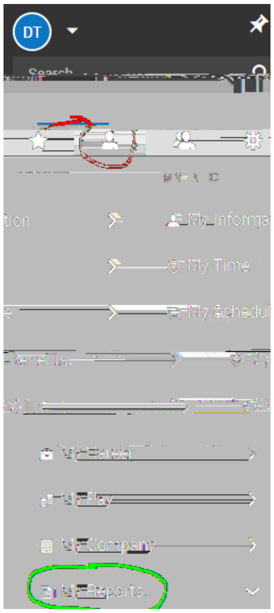
Reporting Basics

This job aid indicates where to find both standard and customized reports in UEIWorkforce. It also provides instructions on how to create a custom report.

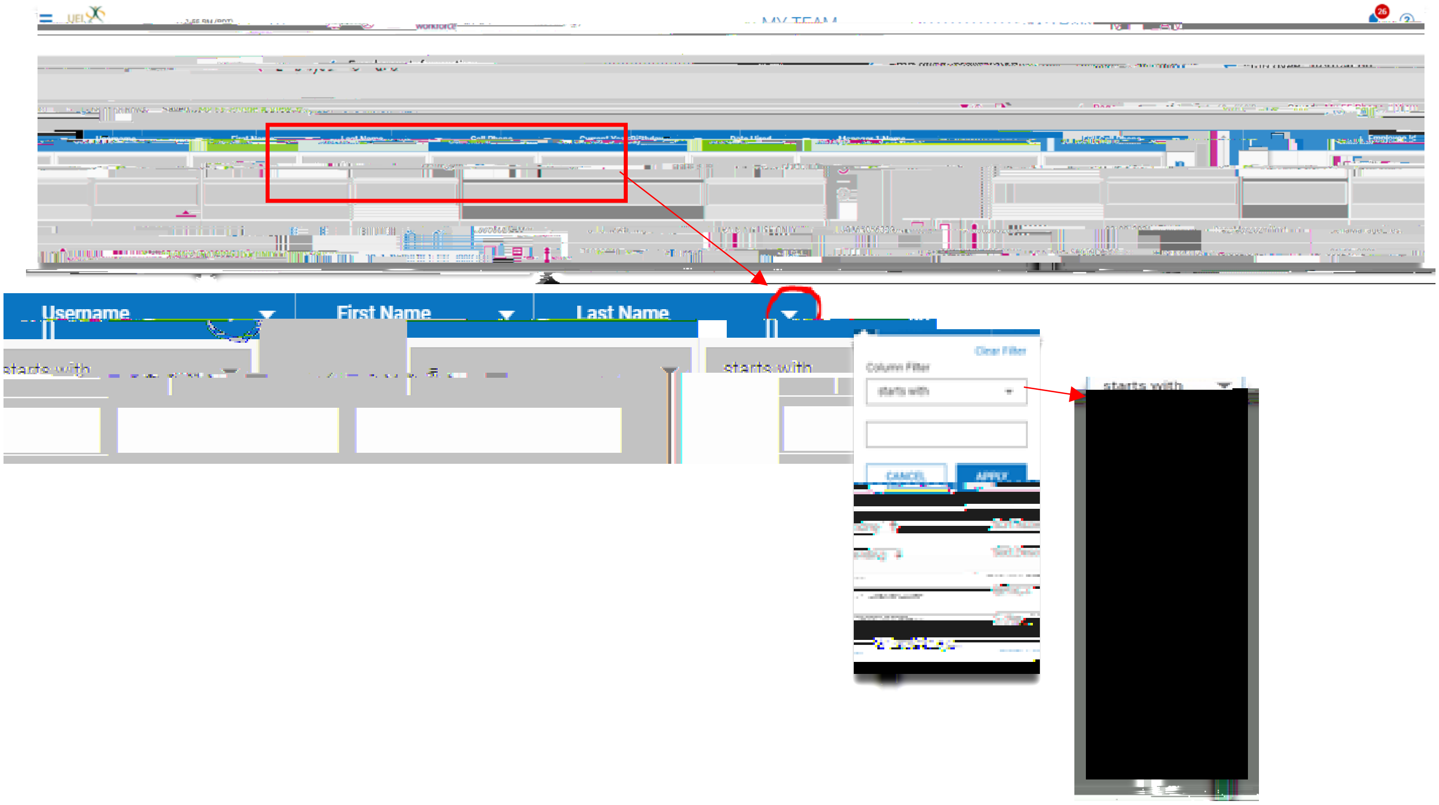

DT
Search
My Informa
My Time
My Schedul
Reports

Standard Reports

A wide selection of standard (ready-made) reports can be found within the main menu under . To find out more about the system's 100+ standard reports, please see .

Sorting Reports

Report data can be sorted using the drop-down menus next to each column header

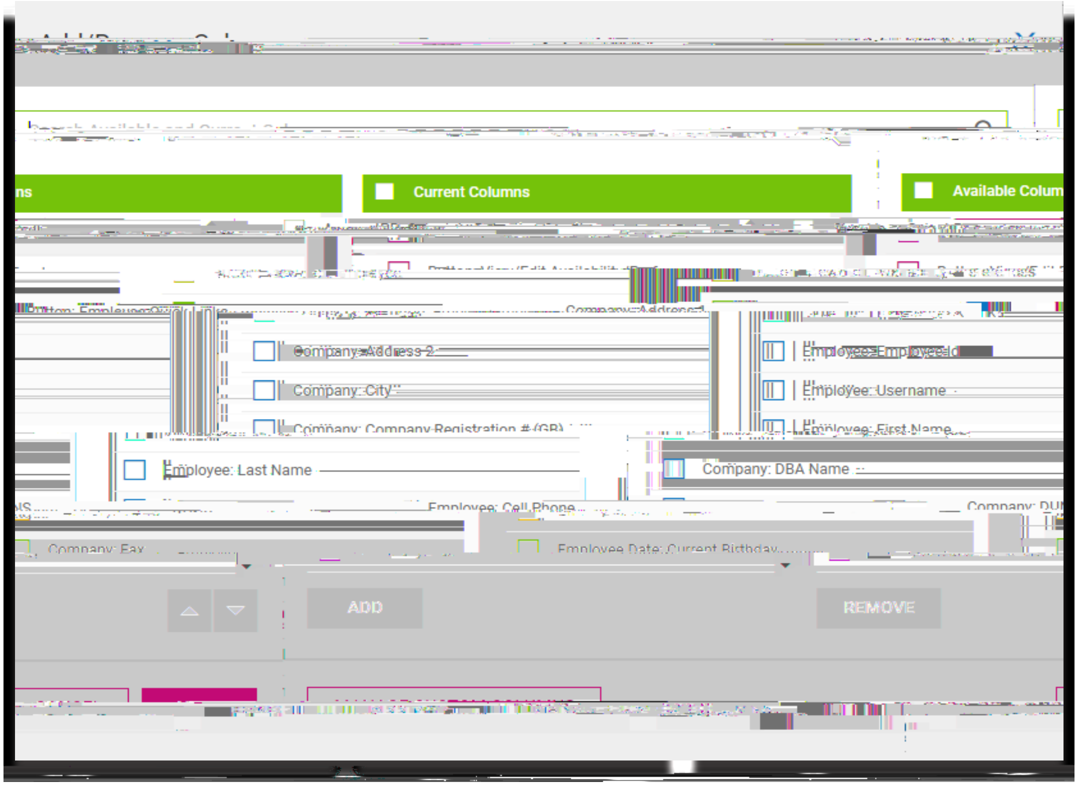

MY TEAM
Username
First Name
Last Name
starts with
Clear Filter
Column Filter
starts with
CANCEL
APPLY
starts with

On the right is a key to the sorting option symbols.

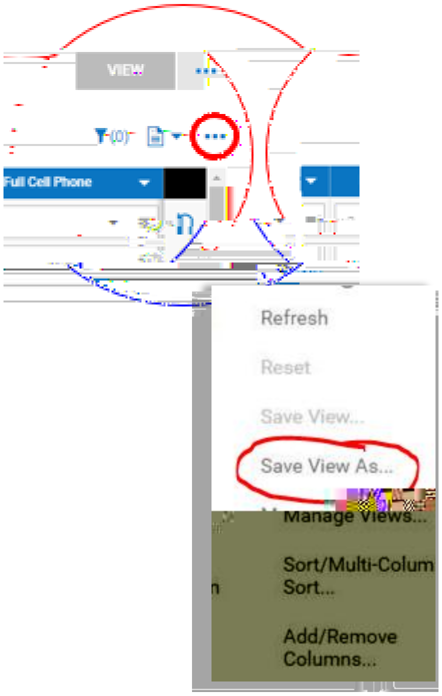
Creating Custom Reports

Custom reports can be built from most views within UEIWorkforce. For this purpose, we willuse the Employee Information view.

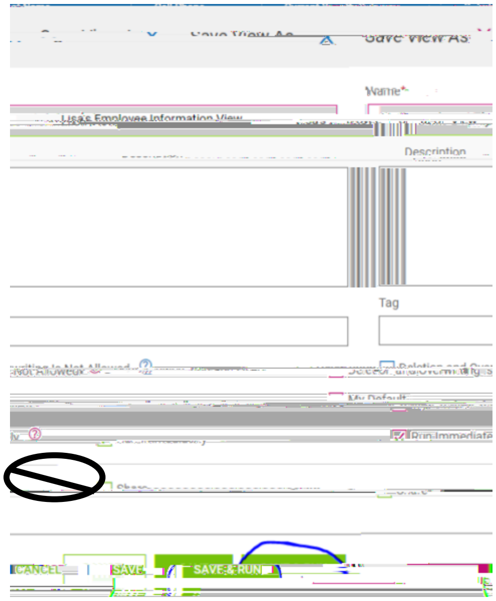
4. In the pop-up below, on the right are the view's current columns. To the left are additional available columns. To add columns, on the left, check the boxes next to the columns you would like to include in your view. Select . To remove columns from your view, on the left, check the boxes next to the columns you would like removed. Then, select . Finally, select to apply the changes.


Current Columns
Available Colum
Company: Address 2
Company: City
Company: Company Registration # (GB)
Employee: EmployeeId
Employee: Username
Employee: First Name
Employee: Last Name
Company: DBA Name
Employee: Cell Phone
Company: Fax
Employee Date: Current Birthday
ADD
REMOVE

5. To save, from the *Action Menu* (ellipsis), select . Name the view.


VIEW
Full Cell Phone
Refresh
Reset
Save View...
Save View As...
Manage Views...
Sort/Multi-Column Sort...
Add/Remove Columns...

6. In the pop-up, complete the fields as instructed and be sure to select *Run Immediately*. IMPORTANT: Do NOT select *Share*. Finally, select


Save View As
Name*
User Employee Information View
Description
Tag
My Default
Run Immediately
Share
CANCEL
SAVE
SAVE & RUN

5. When adding a new email schedule, fill out each field as needed.

¶ Be sure to select a day/days and time for the email to be delivered.

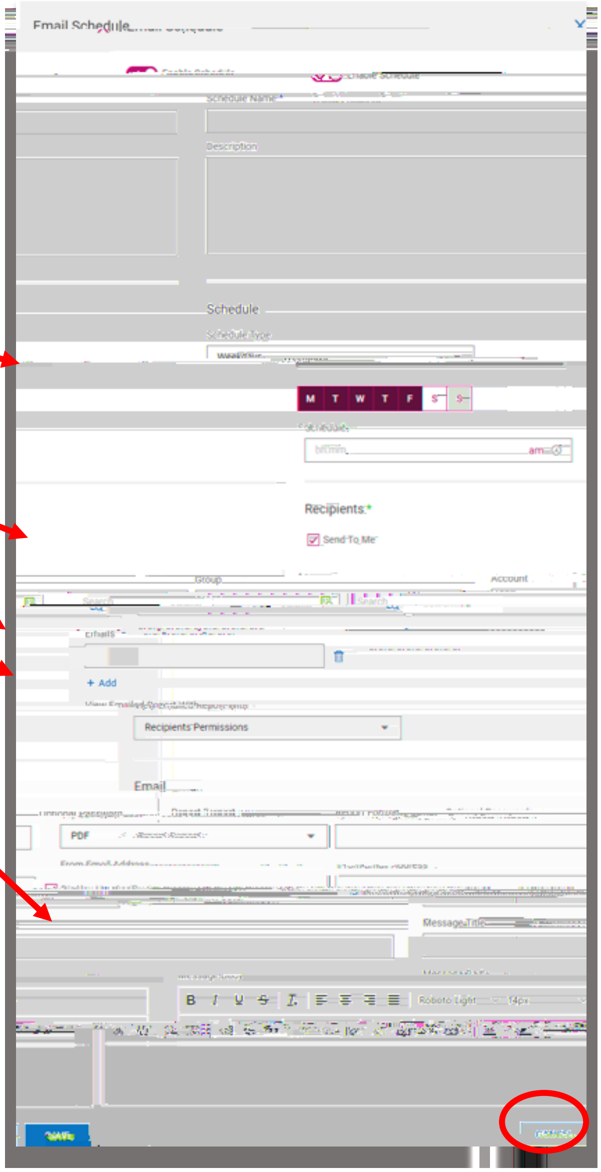
¶ Check the box to have the report emailed to yourself.

¶ Enter the email of the selected recipient.

¶ To add additional recipients, select .

¶ You may also choose to enter in an email title and custom message.

¶ Once completed, select .


Email Schedule
Schedule Name*
Description
Schedule
Schedule Type
M T W T F S S
Schedule
hh:mm am
Recipients*
☑ Send To Me
Group
Account
Emails*
+ Add
Recipients Permissions
Email
PDF
Message Title
B I U S
Roboto Light
14px
SAVE

Questions? Contact UEI Human Resources at uei-hr@csus.edu or call (916) 278-7003.