

Heartland

Client User Guide: Report Writer

This client user guide for Heartland's Report Writer feature covers creating, editing, filtering, and generating custom reports.

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What is Report Writer?

Report Writer is a quick and efficient way to create custom reports that is easy to understand by users with varying skill sets. It walks the user through selecting a report type, report title, page layout, default report format (PDF or Excel), columns, sorting, totaling, page breaks, filters, column headings, column size, font, and font size. Custom Reports can be added to the On Demand Reports or the Date Range Report list, depending on the report type.

Benefits of the Custom Report Writer

- It is user-friendly so that you can build custom reports with ease.
- The Report Writer feature is offered at no additional charge.
- Most custom reports can be added to your preview scheduled reports and even your payroll package.
- It provides the flexibility of creating reports that show information in a custom manner.
- Reports can be generated in PDF or Excel format.


Types of Custom Reports

HR Report: (*Payroll + HR product Only*) This type of report has a single row of data for each employee. Reports can be generated for an *As Of* date and include the HR-specific categories included with the HR product.

Payroll Employee Report: This type of report has a single row of data for each employee. Reports can be generated for an *As Of* date or a specific payroll run.

Payroll Check Detail Report: This type of report has a single row of data for each employee. Reports can be generated for an *As Of* date or a specific payroll run. Check accumulation fields display the accumulations as they were on the *As Of* date or the specific payroll run.

Date Range Report: This type of report has multiple rows of data for each employee (one row of data per payroll run, within the date range, for each employee). Reports are generated for a date range.

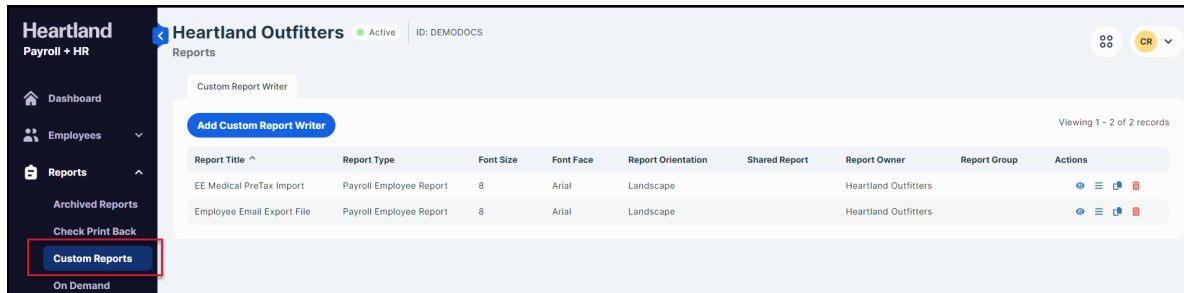
 **Labor Allocation:** *Custom Report Writer was built at the employee level and cannot be utilized for building employer labor allocation reports.*

- Employees are assigned to a Home Department in the system. Even if an employee's wages are allocated to several departments with payroll, the wages will be assigned to the Home Department in Custom Report Writer. Check out your *Labor Allocation Detail* or *Labor Allocation Summary* report for the proper breakdown of employee labor allocation.

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Report Writer in Heartland

Reports → Custom Reports → Custom Report Writer → Add Custom Report Writer



Create a New Custom Report

Select **Add Custom Report Writer**. The first step in the wizard establishes the report type, report title, font and font size, orientation, and report group.

Add Custom Report Writer

1 Create New Report 2 Select Fields 3 Edit Columns 4 Add Report Filters

Create New Report

Report Type *

Report Orientation

Report Title *

Report Group

Font Size

Font Face

Totals Only Summary Report

Next

Report Type is used to select the type of report that will be created.

The **Report Type** **cannot** be changed after the **Save** button has been selected.

Report Title is used to enter a title that will print on the report.

The **Report Title** **can** be changed after the **Save** button has been selected.

Font Size ranges from 6pt – 12pt.

Font Face (style) defaults to Arial.

Additional options include Times New Roman, Tahoma, Microsoft Sans Serif, Courier New, Arial Black, and Verdana.

Report Orientation defaults to *Landscape*. *Portrait* is the other option.

Report Group is used to grant access to reports based on the group assigned to the Client User.

Select Default Report Group. If this field is left blank, the report will not be viewable.

Totals Only Summary Report toggle is used to create reports that have totals only instead of showing employee detail. If you want this, you will need to toggle to Yes.

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Select Fields

The *Select Fields* step is a quick method to select all columns used on the report.

Edit Custom Report Writer

Progress: 1. Create New Report (✓) 2. Select Fields (2) 3. Edit Columns (3) 4. Add Report Filters (4)

Select Fields

Field Category: Employee Data

Available Fields: Search Field (0/100)

Column	Actions
ACA Exempt (Y/N)	+
Address Line 1	+
Address Line 2	+
Adjusted Service Date	+
Age	+
Age	+
Birth Date	+

Category	Column	Actions
Employee Org & Labor	Division Code	+
Employee Org & Labor	Department Code	+
Employee Data	Employee Number	+
Employee Data	Employee Name (First Last)	-

Buttons: Back, Next

Once the **Field Category** is selected, the **Column** box will display all columns for that category.

Columns can be selected from multiple field categories by simply selecting another field category from the drop-down menu. *When assigning the fields, Division Code, Department Code, Employee Number, and Employee Name (First Last) will be displayed by default.*

- **Add** a column by clicking the plus (+) sign next to the desired column.
- **Remove** a column by clicking the minus (-) sign next to the column.
- The number of columns displayed on a report is determined by the report format and column size selected.
 - **PDF Format:** If there isn't enough room to display all columns, then the columns that exceed the printable area on the right will not display.
 - **Excel Format:** A maximum of 256 columns can be selected.

Category	Column	Actions
Employee Data	Employee Number	+
Employee Data	Birth Date	+
Employee Data	Employee First Name	+
Employee Data	Employee Last Name	+
Employee Data	Employee Middle	+

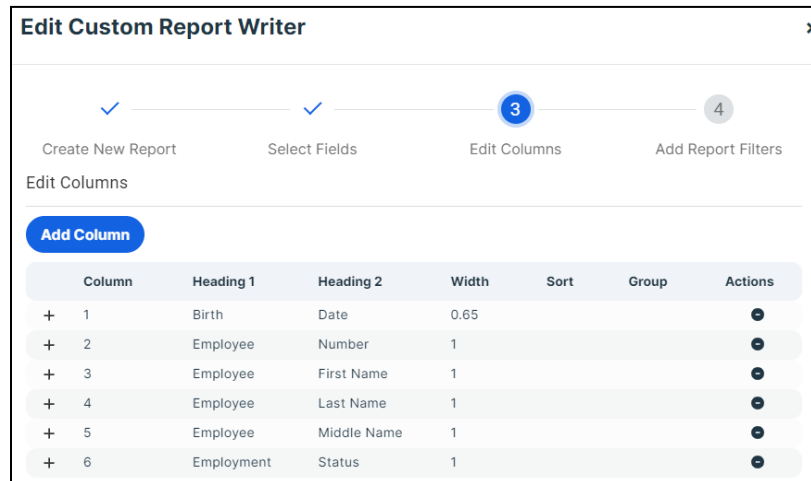
Buttons: Back, Next

💡 We recommend removing the default *Employee Name (First Last)*. Selecting instead the *First Name* and *Last Name* columns individually, as shown above. This is an easier way to sort and filter by employee name.

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Edit Columns

Edit Columns are used to format the report columns, designate sorting, define totals, and page breaks.



The Columns you selected will be listed in the *Edit Columns* section.

- **Edit** the columns by selecting the plus (+) sign next to the column to edit.
- **Remove** a column by selecting the (-) in the Actions column.

Heading 1 and **Heading 2** are used to enter column headings that are displayed on the report.

To see one line for the Heading, you can move all verbiage from Heading 1 to Heading 2. There are spacing limits, the Heading verbiage or Column Width may need to be edited.

Hidden Column toggle is used to indicate the column should not be displayed on the report.

Necessary when a column is needed for calculation and/or filtering purposes but should not be displayed on the report.

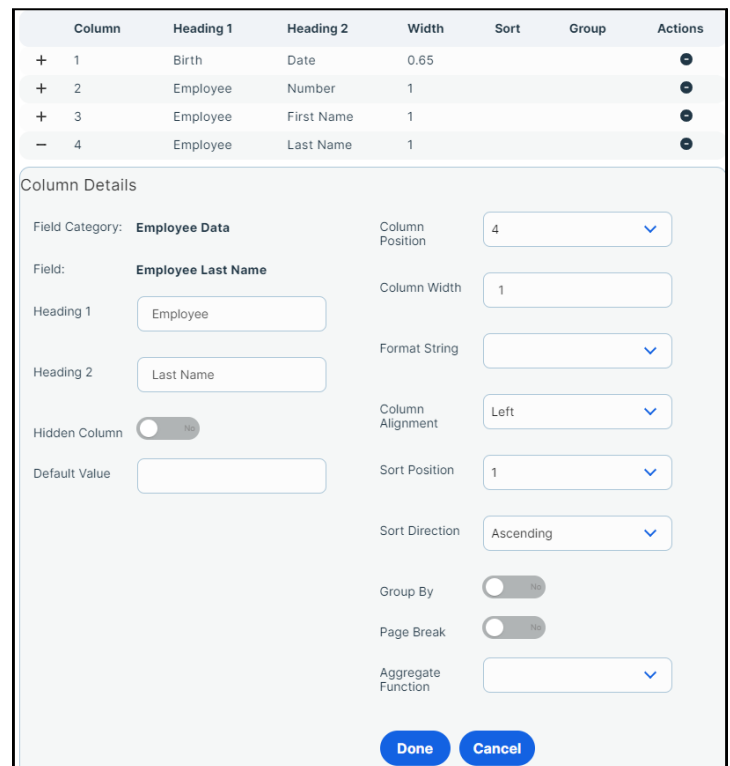
Default Value is used to enter a default value when the value is *null* in the system. The max field length is 50 alphanumeric characters.

Column Position is used to sequence the columns from left to right.

Column Width is used to adjust the width of a column if needed. The database assigns a default column width for each column.

Format String drop-down is used to select a format to display the data.

Column Alignment drop-down is used to select an alignment for each column.



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Edit Columns (cont.)

Sort Position drop-downs are used to define how the report should be sorted.

The first drop-down is used to select a sort position (ex. 1,2,3).

The second drop-down is used to select Ascending (ex. A, B, C) or Descending (ex. Z, X, Y).

Group By toggle is used to group the sorted data. Grouping data allows for the use of subtotals for the group.

This toggle is only enabled if there is a sort selected.

Page Break toggle is used to define page breaks.

This toggle is only enabled if there is a sort selected.

A page break will be inserted whenever the sort field value changes.

Column Details

Field Category: **Employee Data**

Field: **Employee Last Name**

Heading 1: Employee

Heading 2: Last Name

Hidden Column:

Default Value:

Column Position: 4

Column Width: 1

Format String:

Column Alignment: Left

Sort Position: 1

Sort Direction: Ascending

Group By:

Page Break:

Aggregate Function:

Done Cancel

Aggregate Function drop-down is used to define what the column totals represent.

Sum: all field values in the column are added together.

Count: a count of 1 is applied to every field in the column that isn't null.

Average: all field values in the column are added together and then divided by the number of rows to come up with an average.

Minimum Value: all field values in the group columns are searched, and the minimum value is at the end of every group.

Maximum Value: all field values in the group columns are searched, and the maximum value is at the end of every group.

Add Report Filters

Report filters are used to include or exclude employees from a report. Multiple filters can be utilized.

Edit Custom Report Writer

Progress: Create New Report ✓ | Select Fields ✓ | Edit Columns ✓ | Add Report Filters 4

Report Filters

Add Filter

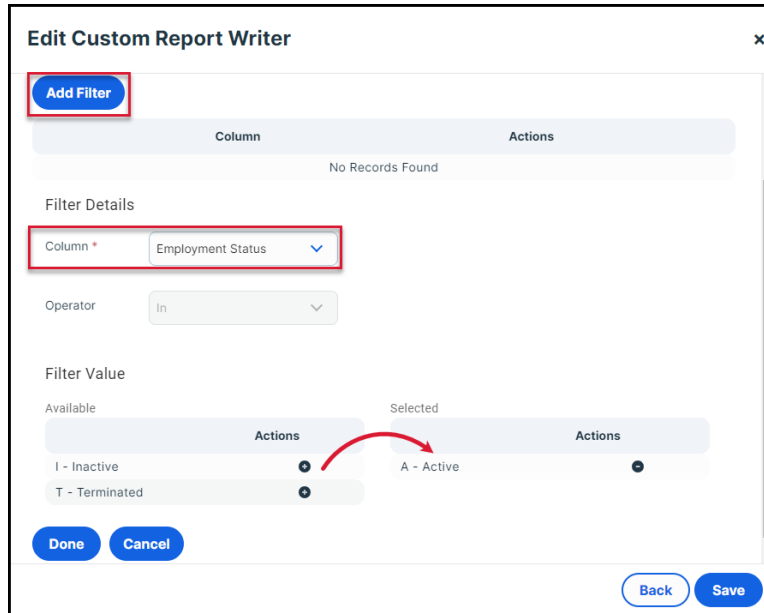
Column	Actions
No Records Found	

Back Save

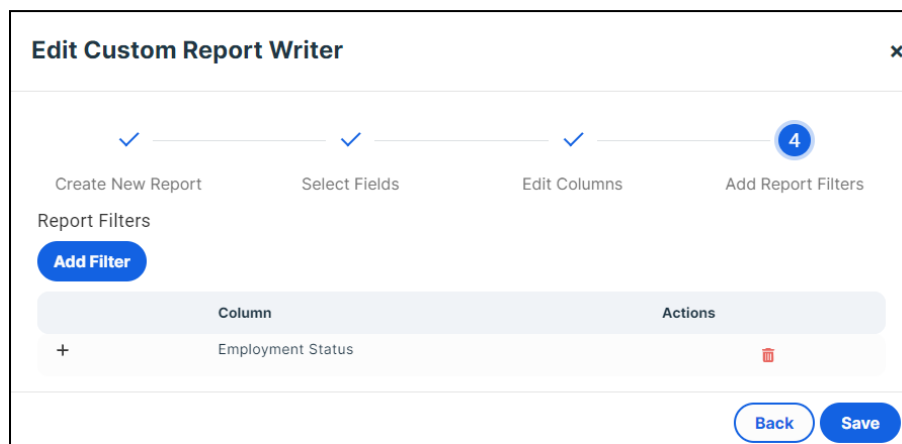
- Report Filters are *AND* commands. Report results only show data that meets *ALL filters*. If no data generates and there is more than one filter, the filters will need to be adjusted or removed.
- All employees will be displayed on the report if there isn't a report filter.

(continued)

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- To add a report filter, select **Add Filter**, select the desired **Column** and **Operator** from the drop-downs, and define the **Filter Value**.
 - In the above screenshot, the Report Filter will ensure **only active employees** display.
- The **Operator** options are dependent upon the **Column** selected.
- A list of all the Operators:
 - = (Equal)
 - Like**
 - != (Not Equal)
 - > (Greater Than)
 - >= (Greater Than or Equal)
 - < (Less Than)
 - <= (Less Than or Equal)
 - In** (Includes)

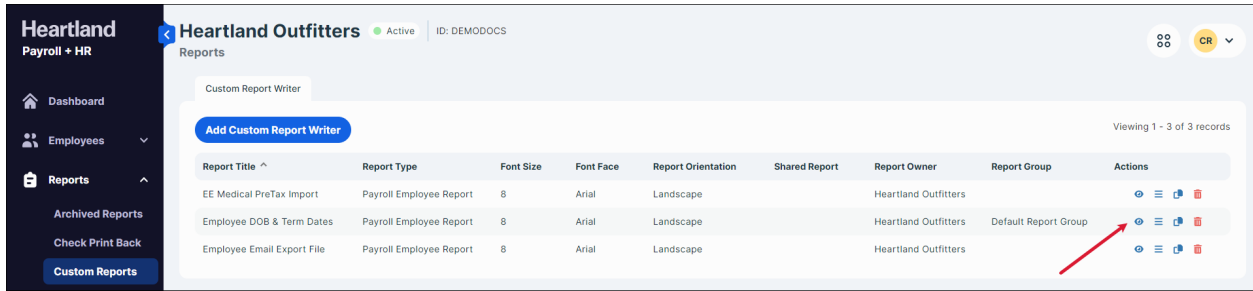


Select *Done* after each new filter. They will be visible with an option to delete (trashcan) each filter.
Select *Save* to finish the report.

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Previewing Reports

To Preview Reports, select the Eye icon located next to the desired report.



The Eye icon will give you the following pop-up box.

Legal drop-down is used to select a legal company if there is more than one.

As Of Date is used to create a report based on the date entered. If left blank, any accumulations on the report will be based on the current system date.

Employee data, such as names, addresses, etc., will display the current values in the database as long as the As Of Date is blank.

Pay Groups select the applicable option if there are multiple.

Payroll drop-down lists all payrolls processed, allowing the report to be run for a specific pay date.

Output Type drop-down is used to select the format for the report.

The default is PDF.

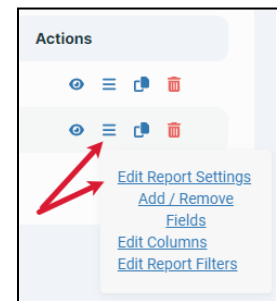
Excel is the other option.

The pop-up form titled 'Employee DOB & Term Dates' contains the following fields: Legal (Heartland Outfitters), As Of Date (MM/DD/YYYY), Pay Groups (Bi-Weekly), Payroll, and Output Type (PDF). A 'Run Report' button is located at the bottom right.

Report Preview

Select **Run Report**, and a new PDF window or Excel file will open. Review the newly created custom report for errors and discrepancies. If there are none, you have finished the custom report!

Client ID: DEMODOCS		EMPLOYEE DOB & TERM DATES			
Client Name: Heartland Outfitters		Heartland Outfitters DBA: Heartland Outfitters			
Birth Date	Employee Number	Employee First Name	Employee Last Name	Employee Middle Name	Employment Status
1/1/1990	101	Alex	Associate		A
2/1/1991	102	Isaac	Instructor		A
3/1/1992	103	Otto	Operator		A
4/1/1993	104	Lucas	Laborer		A



If all columns are not visible, close the report; select the menu icon to edit the custom report.

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Scheduling Reports for your Payroll Package

If you would like your report delivered with your payroll package, please contact your Payroll Support Team. They can add your custom report to your payroll package, or you can run the report when needed in *Custom Report Writer*.

What are the limitations of Report Writer?

Report Writer can do many things, but below are a few things it cannot do.

- ACA Reporting
- Certified Payroll Reports
- General Ledger Reports
- Job Costing
- Labor Allocation
- Positive Pay File Reports
- Date Range reports with wages
- Workers' Compensation rates cannot be pulled in

Need assistance?

Please contact your Payroll Support Team at 1-877-729-2968.