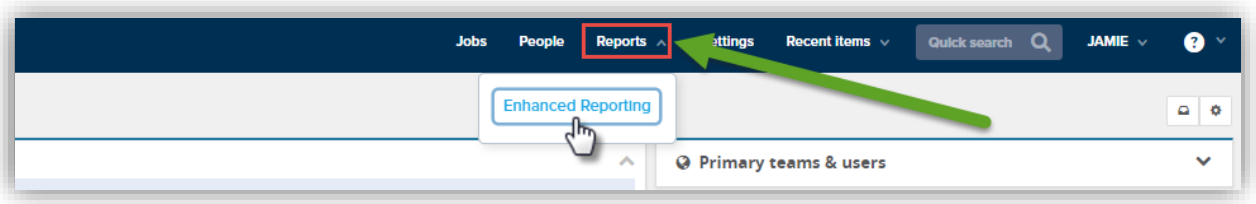
# Enhanced Reporting

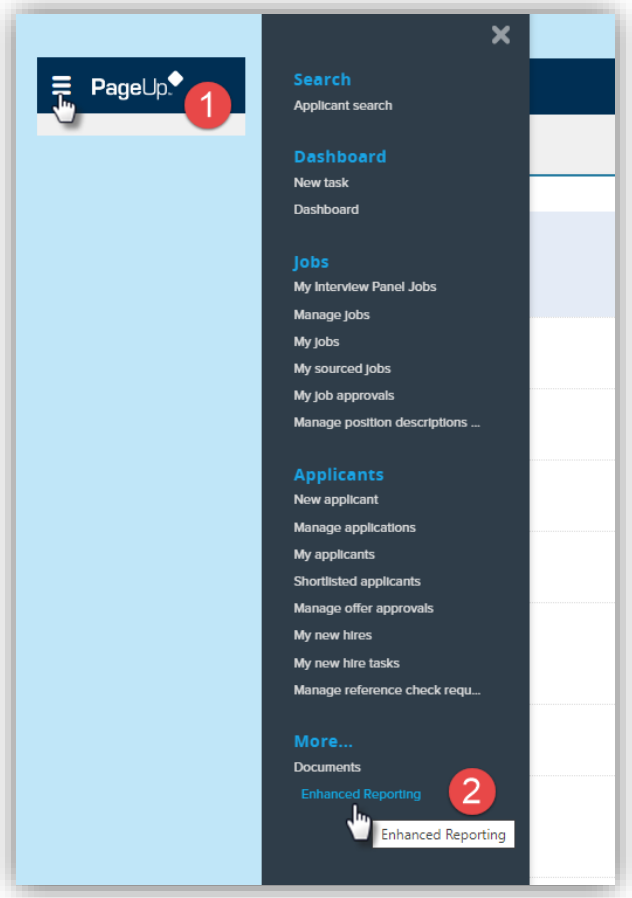
Open PageUp and select the *Reports* tab quick link in the top header. Click *Enhanced Reporting* from the dropdown.



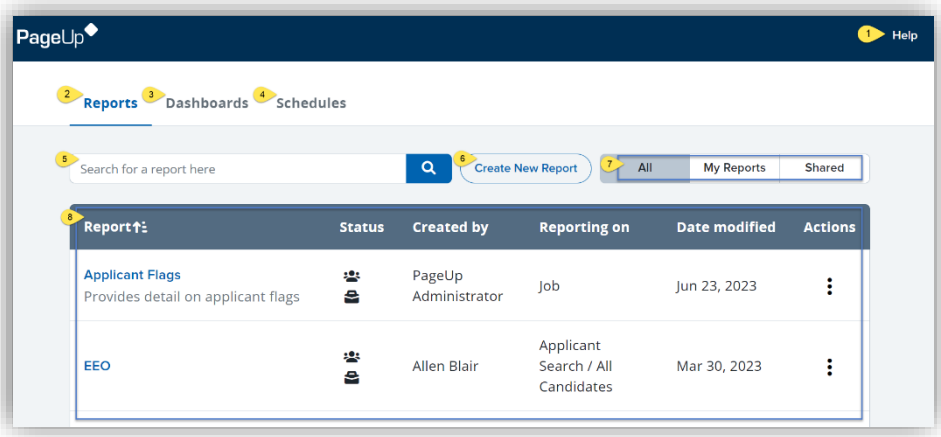

****Note**: If you don't see the tab, reduce the screen size until more selections are visible.

**OR**

From the side "hamburger" menu select More…→ Enhanced Reporting



**Features:**

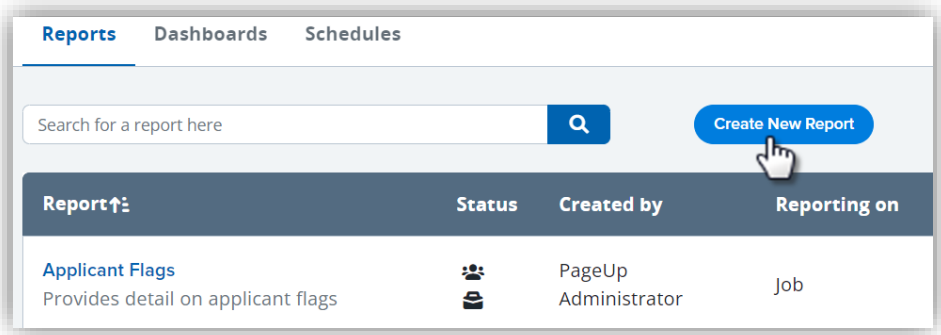



1. **Help** - click to load the **Knowledge Portal** topic of **Enhanced Reporting**.
2. **Reports** tab – view of all the accessible reports. *Displays by default.
3. **Dashboards** tab - click to manage your dashboards.
   ***Note:*** Available for Advanced Analytics clients only
4. **Schedules** tab - click to **manage report run schedules**.
5. **Search** – use to search for reports.
6. **Create New Report** – button to create a new report.
7. **All, My Reports, Shared** buttons - click to filter the report list. *All is the default.
8. **Report list** - displays drafted and published reports.
   - The following column headings can be clicked to sort by ascending or descending **Report**; **Created by**; **Reporting on**; **Date modified**.
   - **Actions** (three black dots in each report row) can include: **View report; Download report; Create draft; Configure; Publish draft; Assign Owner; Share**.
     - NOTE: The options in the action's menu will vary depending on the report you select.

Click the name of the report in the *Report* column to view it.

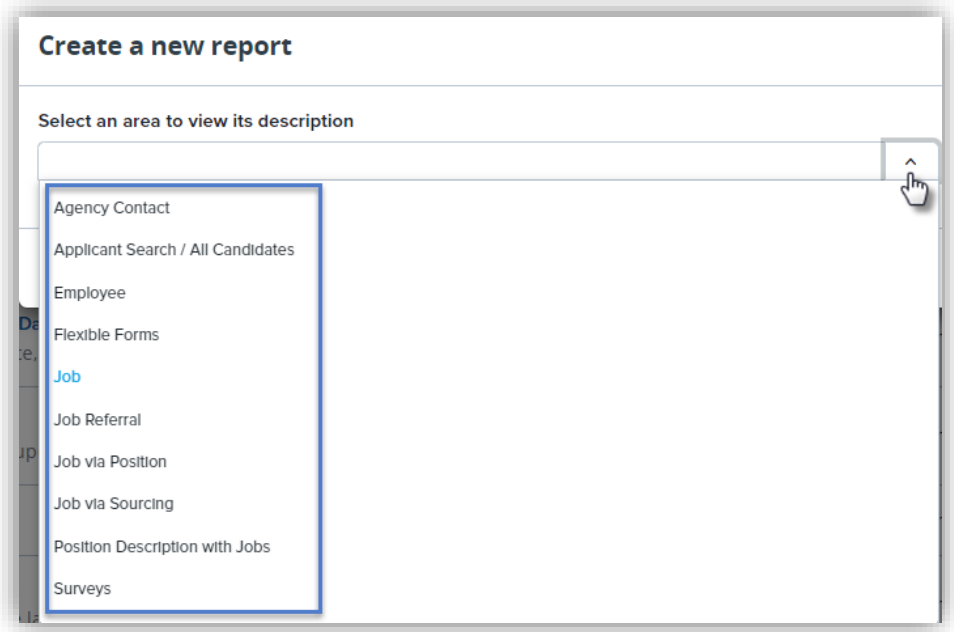
**Creating a report**

From the Enhanced Reporting home page, click *Create New Report.*

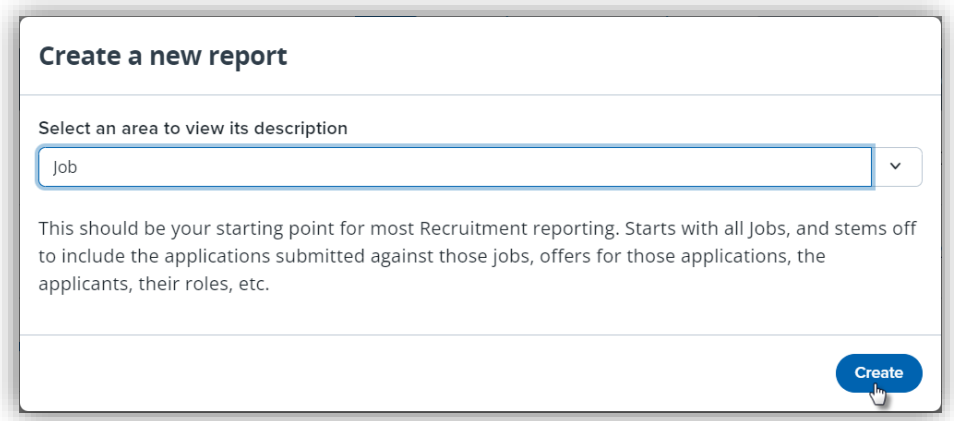


In the new report pop-up window, select a general category or area of report that you wish to start with.

****Note**: The category selected will not restrict the fields you can use for your report. It is a tool that provide options for pre-built reports in each category commonly used in PageUp.



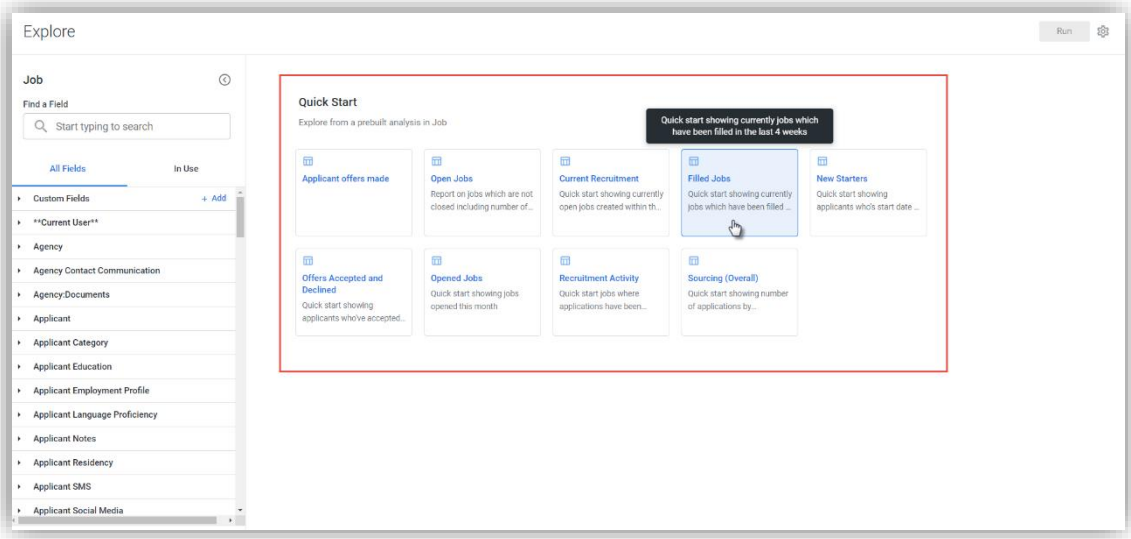

Once a category is selected, click *Create*.




In the center of the screen there may be *Quick Start* reports that are pre-built by PageUp.

Hover over any of the report blocks to view a brief description.

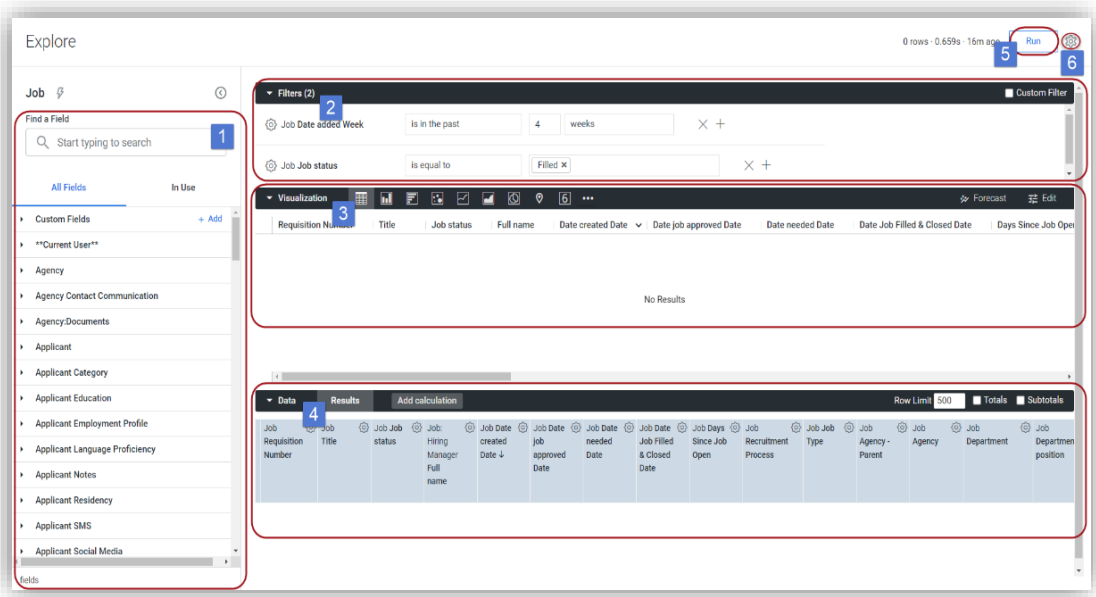
Click on a block to use any of the quick start reports as is or use them as templates for building your own reports.




By selecting a quick start report, the report will be loaded and is available for viewing and/or editing on the *Explore* screen view. You can also choose to build a report from scratch and start adding fields using the fields listed on the left of the screen.

## Explore screen

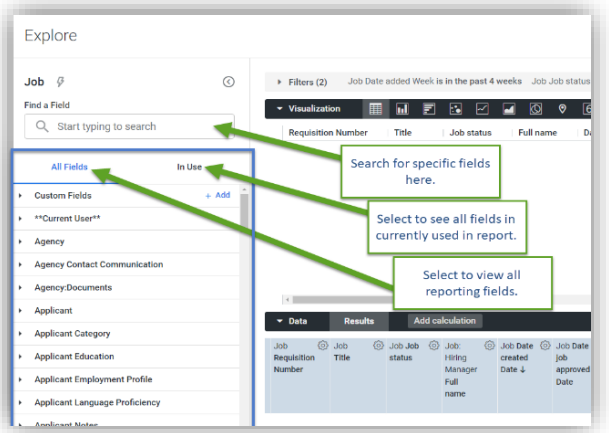
The Explore screen can be divided into 6 areas:

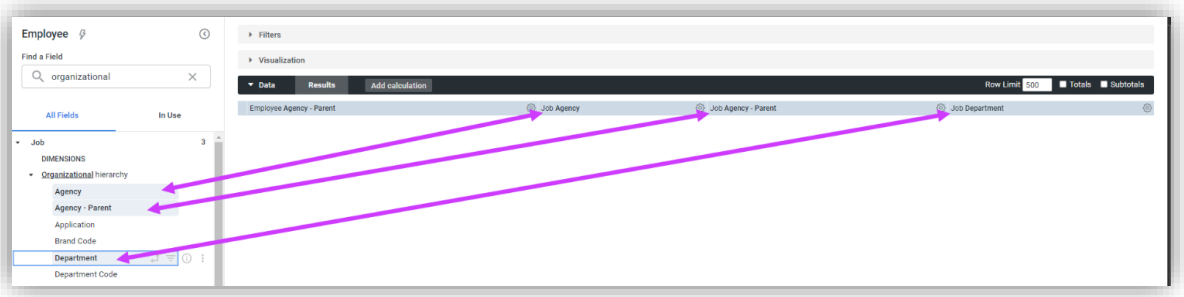



1. Fields
2. Filters
3. Visualization
4. Data
5. Run
6. Report Actions menu

**Fields** – All available fields are shown and can be browsed through when the *All-Fields* tab is selected. Search for specific fields using the top *Find a Field* search bar. The fields are categorized into sections. Determine the best selection based on the category headings returned in the results.

To add a field to the report, click it. When it is added, it will be highlighted grayish blue. The field will also be added as a column in the *Data* viewing area.



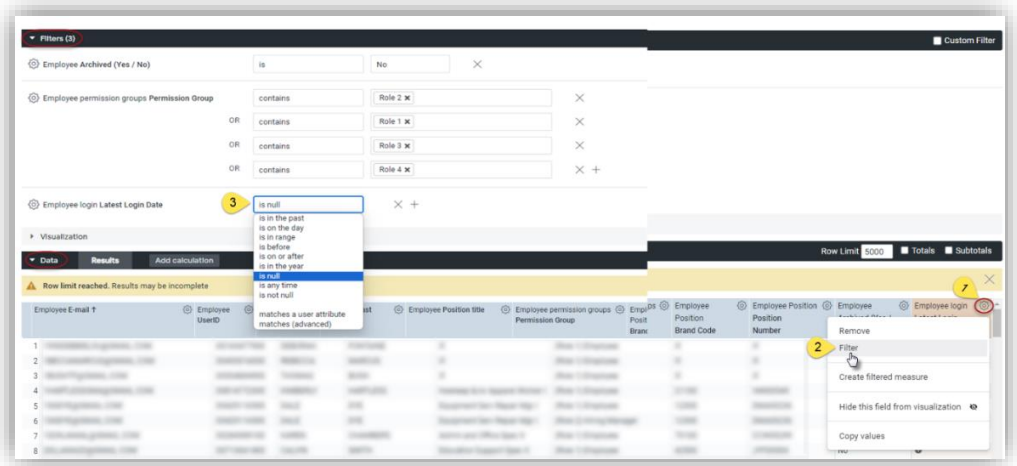




****Note**: To access a PageUp field data dictionary with frequently used reporting fields, click here.

**Filters** – The top of the screen in the main viewing panel of screen. This is where you can edit existing filters and / or create new ones.

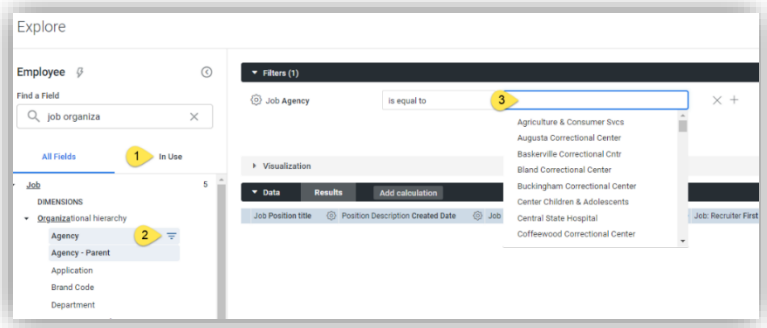
To filter on a specific field in your report:

1. Find the field in the column in the data area of the screen.
2. Click the cog in the field column heading to see the field data options. Select *Filter* from the drop down.
3. Define your filter in the top *Filters* section, based on your specific criteria.



**OR**

1. Select the *In Use* field tab.
2. Find the field you wish to filter and click the *Filter by field* icon with three horizontal lines.
3. The field will be added to the *Filters* section and from there you can adjust the filter as needed.

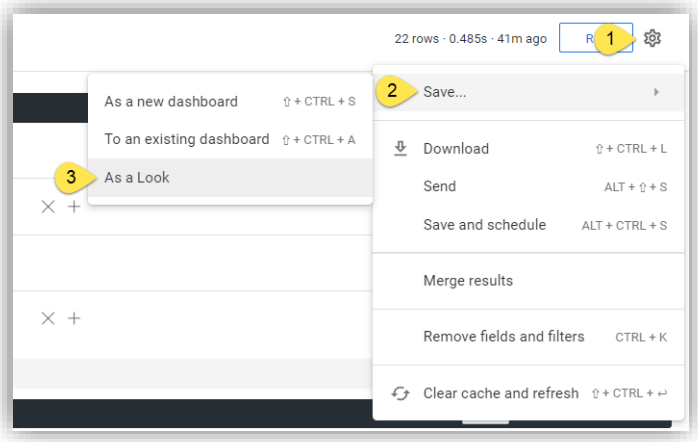


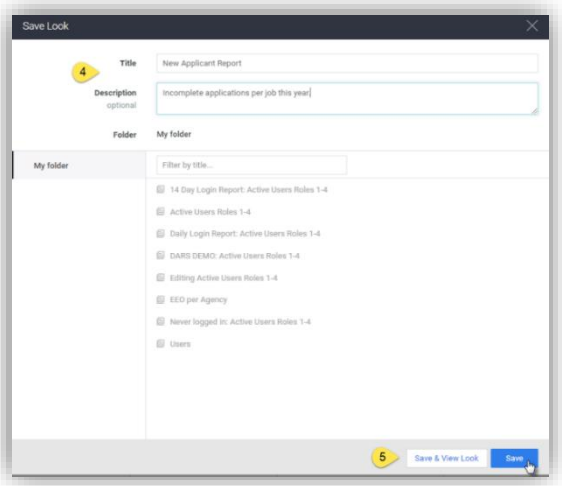

## Visualization

Refer to [Knowledge Portal article]() for more information.

## Saving a report

1. In the Explore view, use the top right cog to view the report menu options.
2. Click *Save*
3. Click *As a Look* (*This means it will display the visualization you selected whenever you initially load the report*)
4. In the *Save Look* pop-up window enter your report *Title* and optional *Description*
5. *Save* by clicking one of the buttons at the bottom of the screen

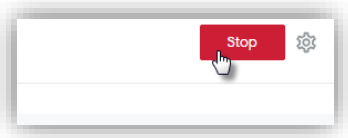


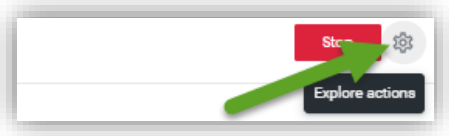
**Clone an existing report**

1. Open the report you wish to clone and edit
2. The report view screen will begin to load.

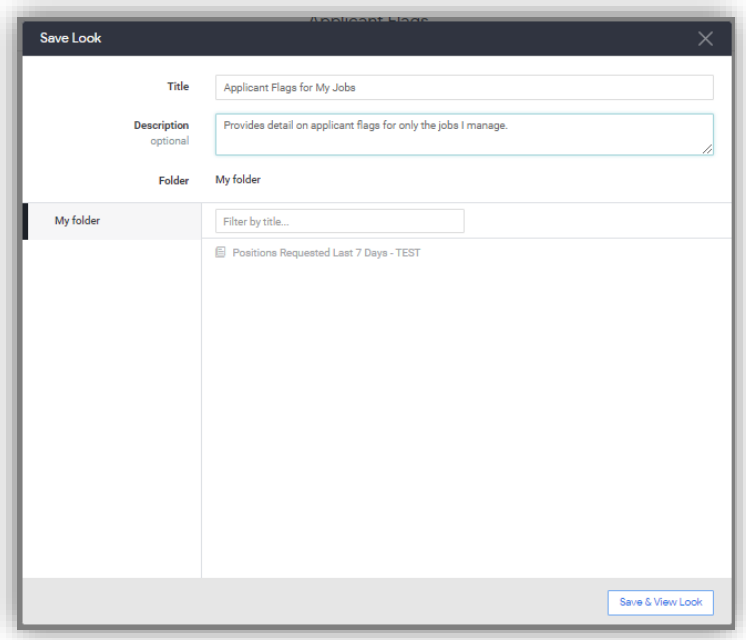
   **If you don't need to view the visualization, press the red *Stop* button in the top right of the screen. It may take a few seconds to appear.




3. Click the cog at the top right of the screen to open the report menu. Select *Save* → *Save As…*



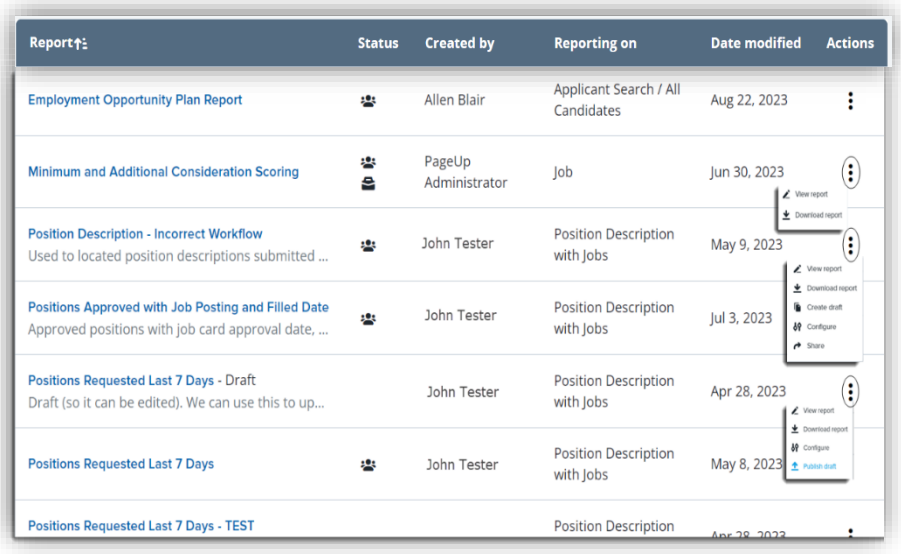

4. A pop-up *Save* window appears. In the *Title* field rename the report. Save the report.




5. If you wish to edit the report, go to the same cog menu and select edit (Cog → Edit)
6. To delete the report, select Cog → *Move to trash*

**Actions menu**

- The report menu options vary based on who created it, who owns it, and whether it is shared or a draft.
- The reports you have created and shared cannot be edited unless a draft is created, or the report is unshared. This prevents changes to be made while others are viewing the report.
- Reports can be scheduled to run on a regular basis in your format of choice and sent to multiple email recipients.




**For additional reporting information, see Knowledge portal articles here.**

**Additional PageUp resources are on DHRM's Talent Acquisition page here.**