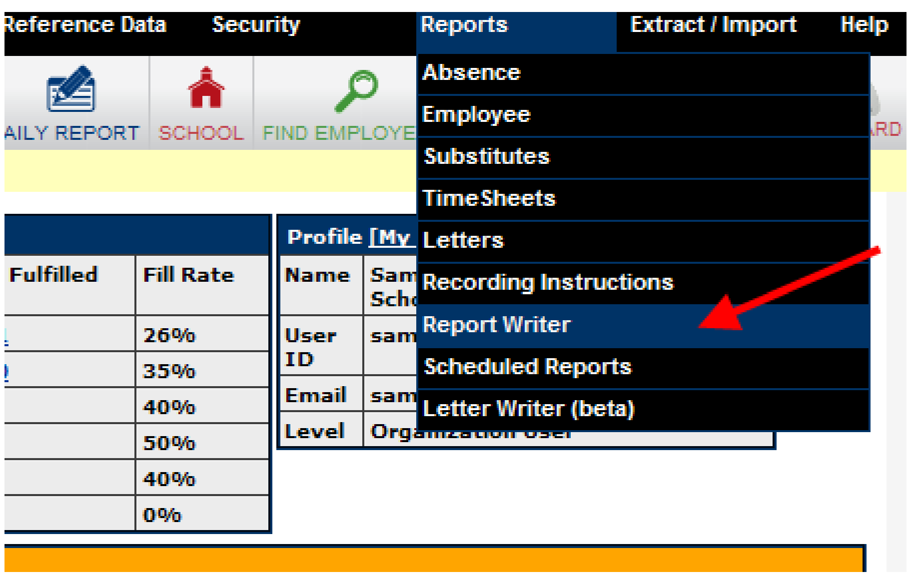
Report Writer — Functionality

One of the great tools in the Aesop program is the ability to run ad-hoc or custom reports from the system. The report writer can be used for anything from generating employee or substitute data in excel to be used for a mail merge, or even creating a very specific report that is designed to merge with your payroll system. The report writer is an extremely easy to use tool that will save you a great deal of time and effort.

Getting Started:

From the main Menu, click Reports>Report Writer.



The first thing you will notice is the various types of reports that can be created in report writer:

Absence Data – This is the most common type of report. The absence data report is used for anything from building that special report that your campus users like to see to building your report for payroll integration

Absence Advanced Notice – this report is used to glean information about how far in advance absences are being entered.

Absence Log Data – this report is used for reporting on how absences were created and filled.

Employee Information – also a popular report, this pulls demographic and skill information for your permanent employees.

Substitute Information – this report pulls demographic and skill information for your substitute employees.

Absence Reason Balances – this report is used to pull absence "Balances" from Aesop.

School Information – school names, ID's, phone numbers, addresses are here.

Absence Reason Type Reference Data – this report holds all of the information on the various entitlement types or absence reasons that you have created.

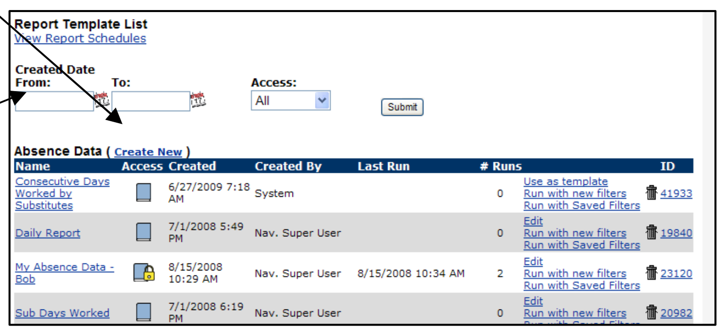
Employee Type Reference Data – holds the data for all of the employee types that you have entered.

Absence Information by Confirmation Number – this report will enable you to run some statistical analysis to see how absences have been created and filled over time.

Organization/Campus User – is used for exporting a list of secretaries and principals, as well as central office users that have been given access to Aesop

Click the "Create New" link to begin creating a report, once you have selected the category of report that you would like to create.

The "Created Date" filter and Access Level filter can be used to limit the visibility of all the reports that have been created so far. It is not necessary to use this filter typically.



Access Level: there are several levels of Access that can be given to a report:

 **Private:** This report can only be seen, edited, and run by me.

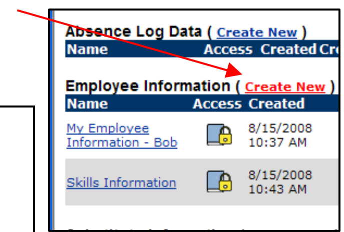
 **Published:** This report can be seen and run by others (defined later), but can only be edited by me.

 **Public:** This report can be seen, edited, and run by others (defined later)

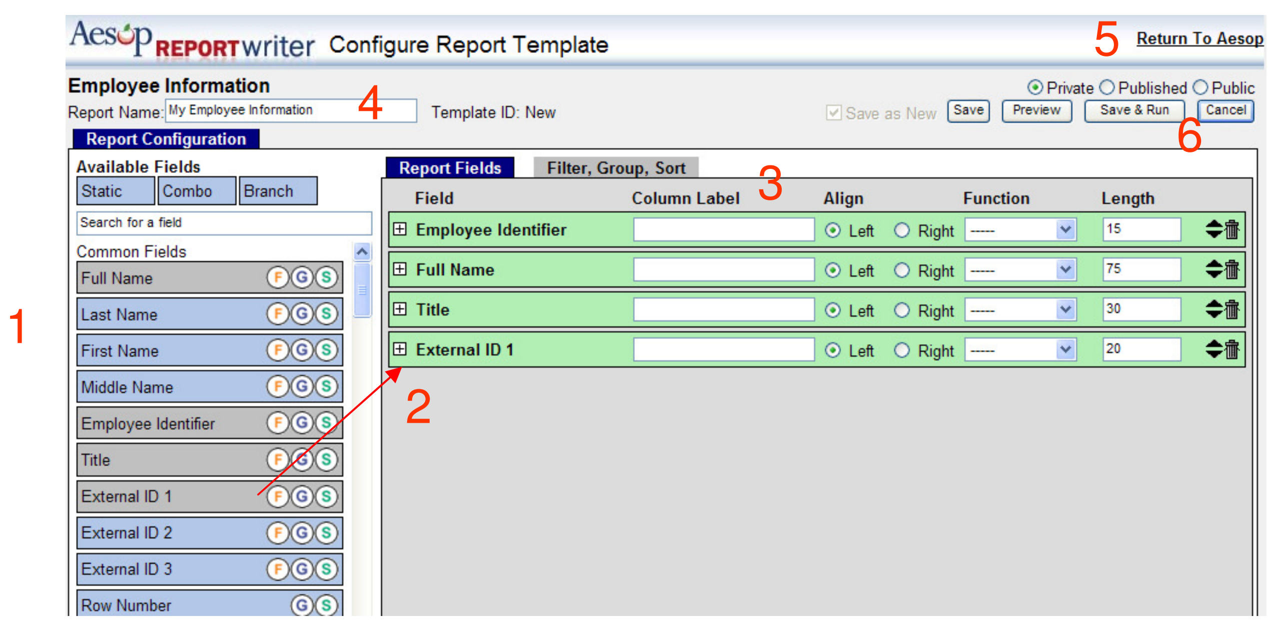
Basic Report Creation (no filtering, grouping, or sorting)

Let's get started by creating a simple "Employee Information" Report.

1. Click [create new]() under "Employee Information" to get started:

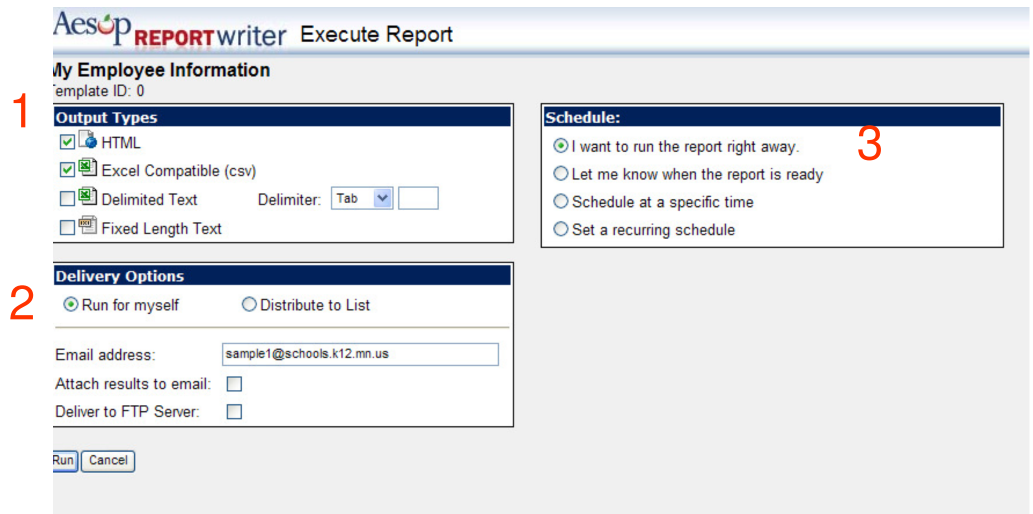


1. On the left hand side, you will see all of the available fields based on the type of report you have chosen. Simply double-click the fields to bring them over to your report "canvas" on the right hand side, or drag and drop the fields there.
2. You can move the fields around in whatever order you'd like
3. You may even customize the column labels for the fields.
4. You can customize the name of your report here.
5. Indicate the level of Access to the Report before saving.
6. "Save and Run" your report.



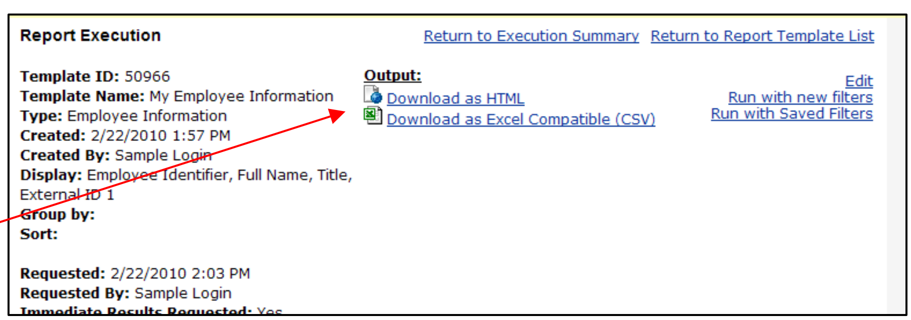
Basic Report Delivery

Reports can be generated on the fly, or they can be scheduled and run on a certain date, or even a recurring schedule. In this example, let's just run the report right way



1. First, choose the type of output that you would like to see. If you want to see the information on a web page, choose "HTML". If you would like to export your data to Excel, choose "Excel Compatible".
2. The most popular option is to "run for myself". We will cover the distribution list component later.
3. Select to "run the report right away"

Once the report is run, you will be able to click the output links in order to see the results of your report



Tip: Right click the link and choose "save target as" to download the file to your hard drive.

Advanced Report Creation

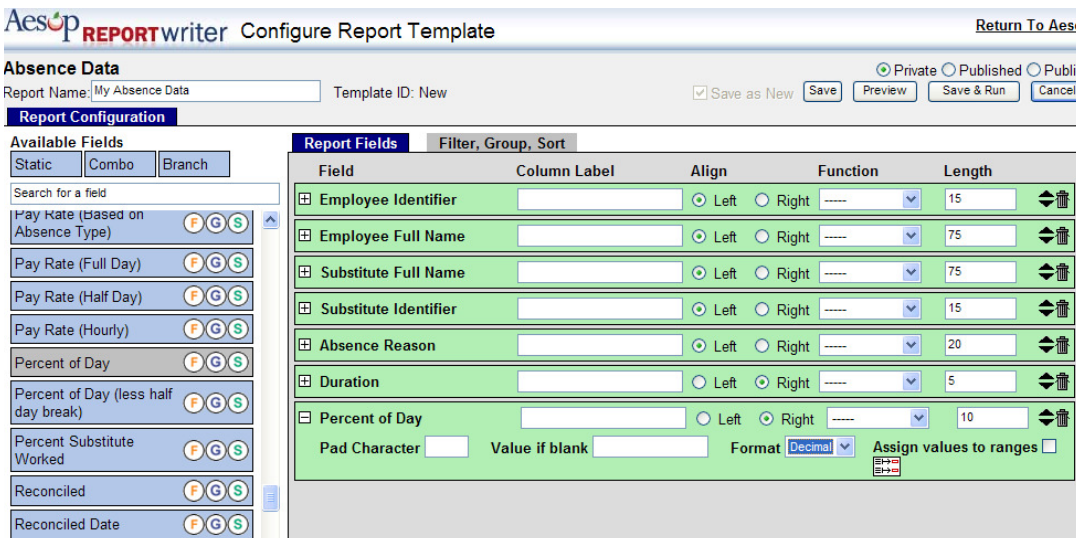
Using Report Writer, you may also create reports and include things like filtering on a certain field, grouping by certain information (including the option to print with page breaks), and also sort certain values to the top or bottom.   This section of the guide will walk you through those features.

Word Problem: Let's say you need to create a report including the employee name, the substitute name, the identifiers for each, the absence reason, the duration, and the percent of day for all absences at South Brighton Elementary School.

First, select which "type" of report you will need (in this case, an absence data report), then follow the following steps: Choosing your fields, filters, output, and delivery.

Step One: Choose your Fields

For this report, we've selected the correct fields, and also we have expanded the "percent of day" to format this as a decimal. Formatting this value as a decimal is your way to present a full day as "1.0" and a half day as "0.5".

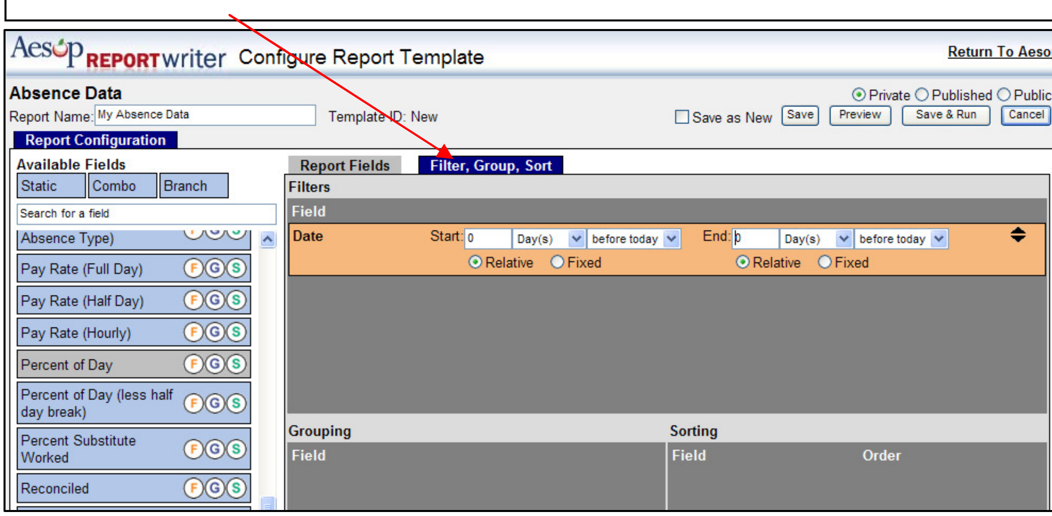


Step Two: Choose your Filters, Grouping and Sorting

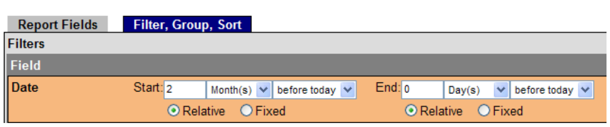
Filtering

Once you click the filter box below, you will have the opportunity to filter the data by a myriad of different options. The most popular filters include

* Date	* Accounting Code	* Reconciled	* Substitute Name
* Filled	* School	* Employee Name	* Absence Reason

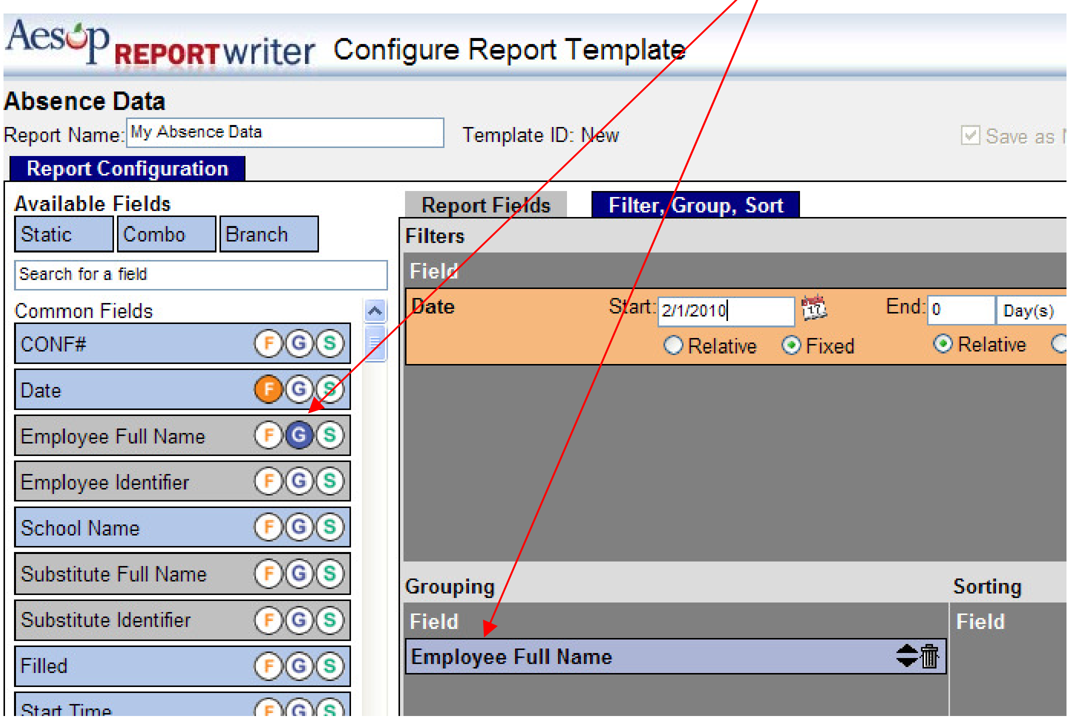


Note: The Date filter can be set either to use a relative date or a specific date. The relative date filter is especially nice if you always want the report to run for the last two months, for example. In that case, your date filter would look something like this



Grouping

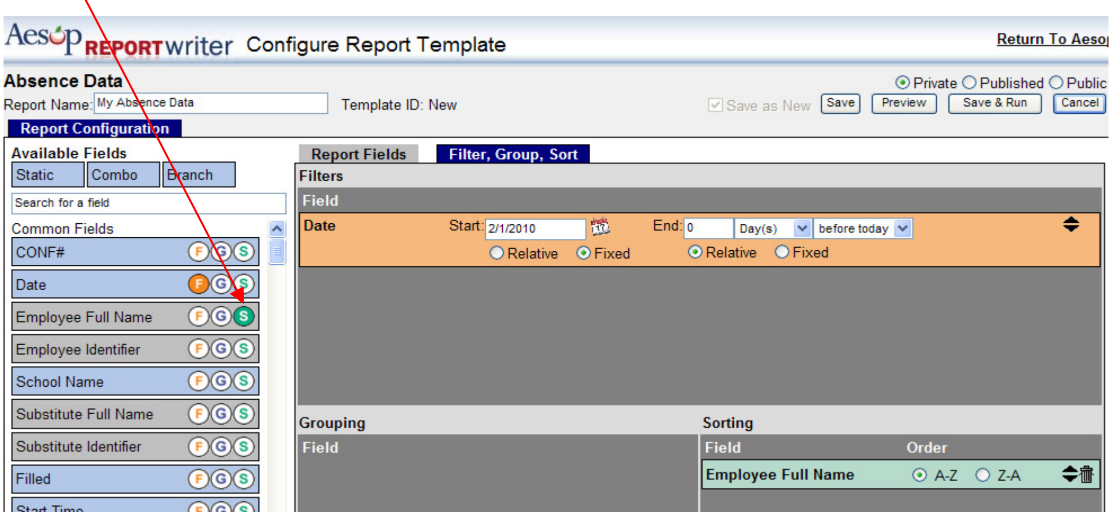
Grouping the data is a powerful way to control how the information is displayed to you if you view the report in HTML. You can either click the G button or drag and drop the field you wish to group by into the group by section of your canvas. In this case, we are choosing to group the information by the employee full name.



By adding multiple "group by" options, you can group by one field as your primary grouping, and the secondary group option can simply be placed underneath the first.

Sorting

Sorting your output is a great way to indicate to the report writer that you would like to see the data in ascending or descending order. The most popular way to sort would be alphabetically by name, or even ascending or descending for the total of a certain value. For example, if you wanted to sort the data by employee name alphabetically, simply click the button or drag and drop the employee full name field into the sorting section of your canvas.

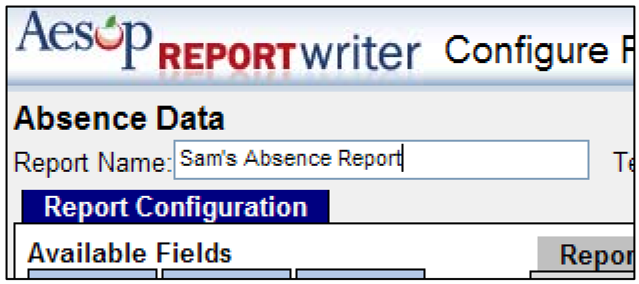


A very interesting sorting option is to sort by the "Percent of Day" field when totaling the data. We will discuss more about "functions" with your data next. However, if you are looking for a report for the substitutes who have worked the most days, or employees who have registered the greatest number of absences, then using the sort function with the report writer to sort in descending order the sum of the "percent of day" can be a powerful way to have Aesop do the heavy lifting for those calculations.

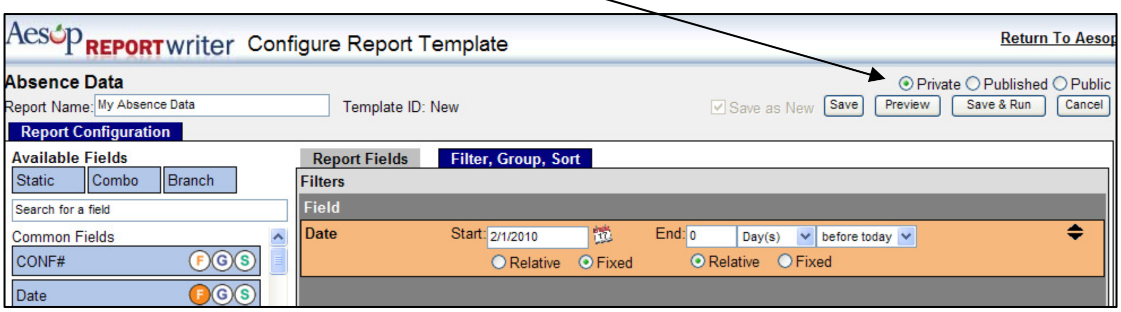
Step Three: Name your Report and Choose the Level of Access

1. Give the report the name that you would like to use

> *You will be able to create reports that are accessible to your campus users later. The name and level of access can be changed at any time.*



2. Indicate the level of access to the report



<u>Access Level:</u> there are several levels of Access that can be given to a report:

Private: This report can only be seen, edited, and run by me.

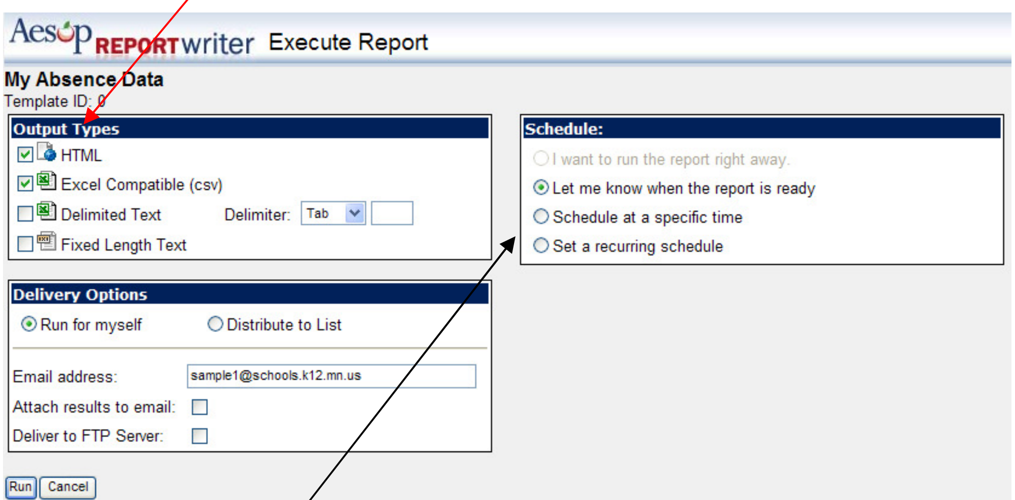
Published: This report can be seen and run by others (defined later), but can only be edited by me.

Public: This report can be seen, edited, and run by others.

Step Four: Choose your output type, schedule, and delivery options:

Output Types: (you may choose multiple)

- **HTML** – you want to see the report on a web page.   This is the best option for nicely formatted reports for viewing and printing.
- **Excel Compatible** – this option is used by those who want to export the data to Excel. This option is also nice for those who wish to make changes in Excel and import the data into Aesop using the import templates.
- **Delimited Text and Fixed Length Text** – these options are used primarily for those folks that are looking to build a file that can be imported to their payroll system.



Schedule:

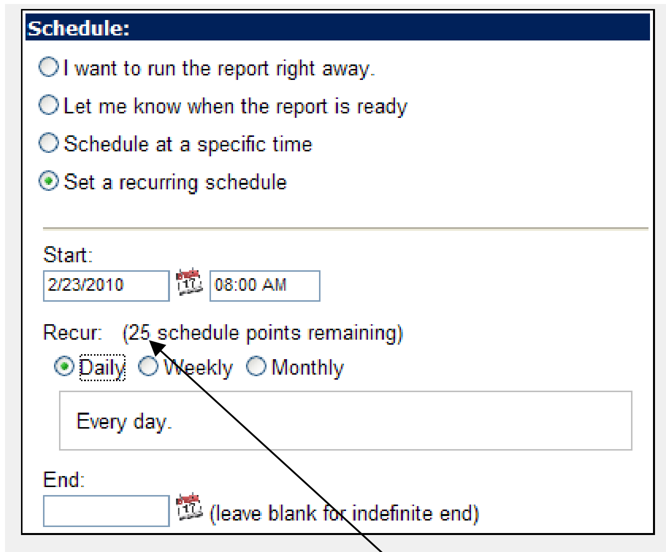
- **Right Away** – this is the most popular option, and will be available as long as you did not choose a date range filter exceeding 30 days
- **Let Me Know** – this scheduling option can be used for lengthy reports. Aesop can process your report and simply let you know (by email) when the report is ready. You do not need to stay on this page, you can continue your work, and the system will email you when the report is done
- **Schedule at a specific time** – This option will allow you to have the report run at a specific time
- **Recurring Schedule** – this report will run at the times that you specify in your schedule setup. More about the recurring schedule is found on the next page.

Recurring Schedules:

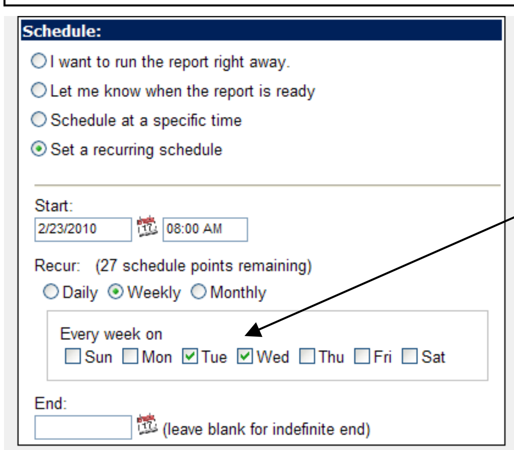
We'd like to take a little time to explain how to set up a recurring schedules for your reports. This is a powerful feature that will assist you with setting up schedules for things like:

- Setting up site based Daily Reports to send to all of your campus users
- Setting up an "unfilled alert" report that can be sent to your campus users only if jobs are unfilled as of a certain point
- Creating your payroll report to run daily on a certain schedule
- And much, much more!

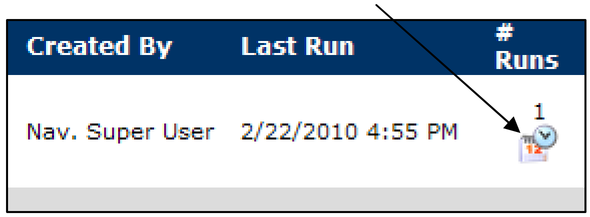
The report schedule to the right would run at 8:00 a.m. each day of the week beginning on 2/23/2010.



When a scheduled report is set up, a certain number of points will be deducted from the district total. A point system is setup in order to provide the same level of access to report scheduling for all of our customers. In general, more points will be used for reports that are more frequent (i.e. daily reports cost more points than weekly reports) and more database intensive (reports with long date ranges use more points than reports with a daily date range). The point usage legend is on the next page.



A weekly schedule like that shown on the left would run this particular report at 8:00 a.m. every Tuesday and Wednesday. When a report is setup with a schedule, you will see the below icon in the report list.



Report Writer **Functionality**

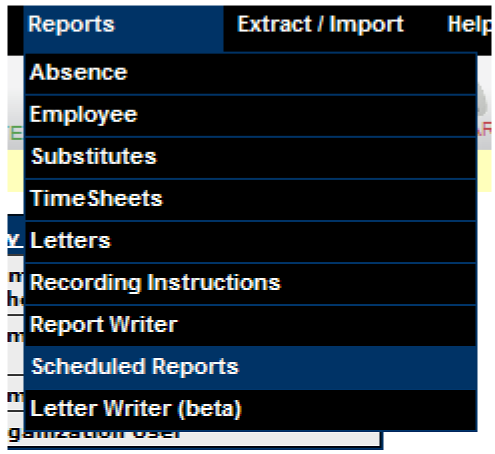
To see all the reports that have been scheduled for your organization, as well as the points that are being used to run each report, click Reference Data>Scheduled Reports.

Daily Schedule (max 31 day date range) – 5 Points

Weekly Schedule – 3 points plus 1 point for any additional day of the week that the report is scheduled for (Running the report on Tuesdays and Thursdays would be 3 points plus 1 additional for the additional day).

Monthly Schedule (max 366 day date range) – 2 points

Ability to schedule and distribute reports – priceless!



This page will show you all of the currently scheduled reports, the details of the current schedule, as well as who scheduled them, and to which distribution list they are going to. To modify the schedule of a report, simply click the icon. To delete a report and free up those points, click the icon.

Scheduled Reports

Name	Type	Scheduled By	Most Recent Run	Points	Delivery
Schedule: 2:41 AM 2/24/2010					
AAATest	Absence Data	Nav. Super User		0	
Schedule: 4:30 AM 2/24/2010					
An Absence Data	Absence Data	logigear logigear		2	
Schedule: 4:28 AM On the first Mon of every 1 month(s) starting 2/24/2010 and ending 10/3/2011					
An Absence Data	Absence Data	Nav. Super User		0	
Schedule: 4:34 AM 2/24/2010					
My Absence Data	Absence Data	logigear logigear		8	
Schedule: 4:27 AM Every week on Sun,Mon,Tue,Wed,Thu,Fri, and Sat starting 2/24/2010 and ending 8/24/2010					

Permissions for which users can create and schedule reports and manage distribution lists can be found under Security>Organization User Profiles. The categories are as follows. Distribution lists are discussed on the next page.

Distribution Lists	All None All Allowed	Advanced
	Create	☑
	Delete	☑
	Edit	☑

Report Writer - Access Level	All None All Allowed	Advanced
	Create Private	☑
	Create Public	☑
	Create Published	☑
	Edit Public	☑
	Letter Writer	☑
	Schedule Reports	☑
	Send to Distribution List	☑
	View Public	☑
	View Published	☑

Distribution Lists:

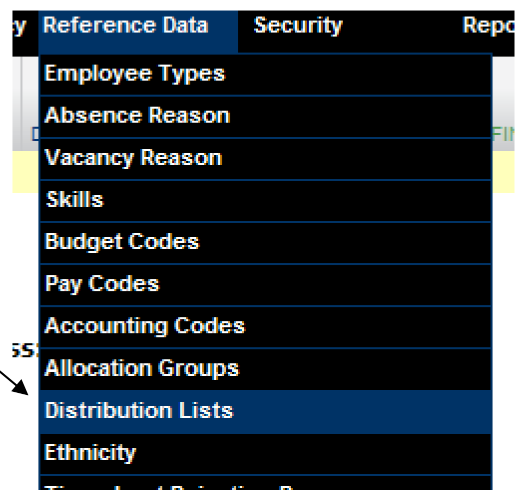
Creating a distribution lists for your report combined with a scheduled report is really a great way to send site or permission specific reports to your users on a scheduled basis.

If you have not yet set up "Campus Users" or "Organization Users", please see documentation on Administrative Permissions to learn how to easily set these up.

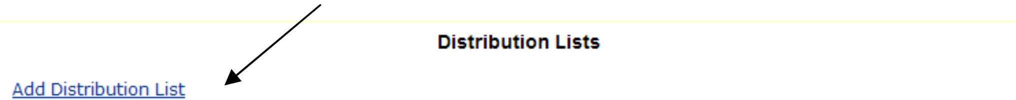
The Distribution List component of Aesop will send reports to the user based on the combination of their school visibility, permission, and employee type profiles. This means that you can set up one Distribution list with all of your Campus Users included in it, and when the report is run, Aesop will send only the appropriate information based on the profile of the person that it is being sent to!

We are going to step out of the report writer briefly to show you where the Distribution Lists are created. *Note: You may only need one distribution list!*

Click Reference Data>Distribution Lists to get started



Click "Add Distribution List"

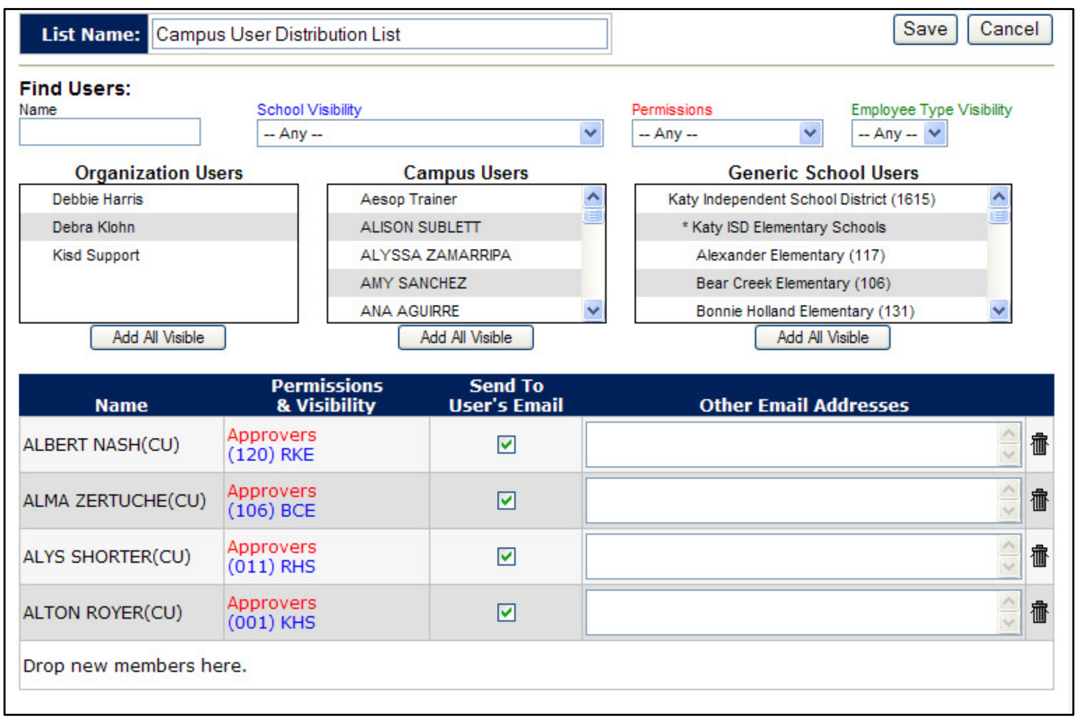


Steps for Creating Distribution Lists:

1. Name your Distribution list (if you are setting this up to go to all principals and secretaries, a name like “Campus User Distribution List” should work fine.

2. Add members to your distribution list – you can add the campus users by using the “add all visible” option, or simply by double clicking the names of the users or “drag and drop” functionality. Notice that the “permissions and visibility” column automatically understands the permission, visibility, and employee type profile that you have given your campus user previously.

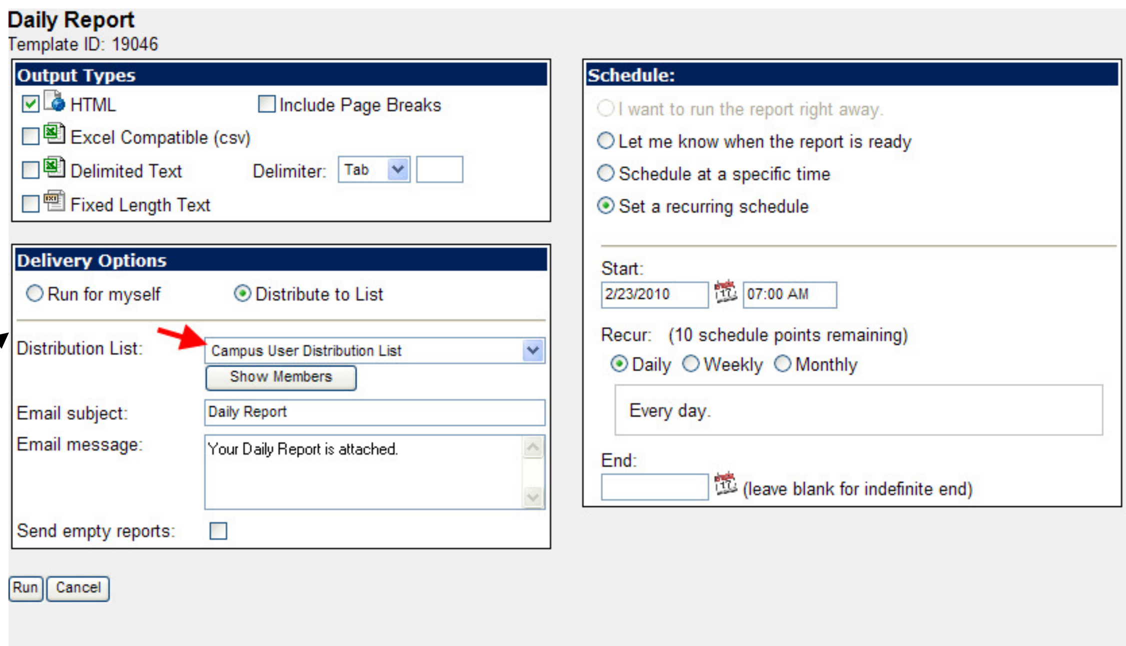
3. You may even add more email addresses to the distribution list (as many as necessary). The emails that you add under “other email addresses” will be used as additional email recipients under the same “permissions and visibility” as the profile on the left hand side

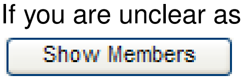


Aesop Best Practice: You might find it beneficial to create a distribution list for “secretaries”, one for “principals”, and another for *both* secretaries and principals. This way, when you schedule a report for distribution, you could have it sent to either or both groups, respectively. To easily access campus users with a certain permission, use the red permissions drop down at the top of the distribution list creation tool to pull all users with a specific permission profile.

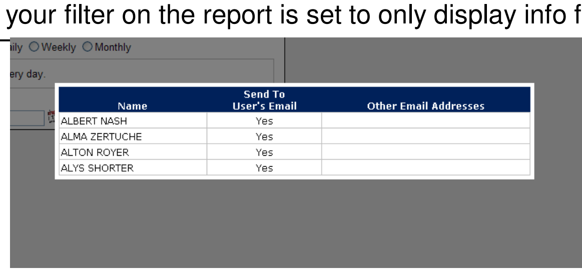
Scheduling a report to send to a Distribution List:

Let's skip back to the Report Scheduling page now that we have created a Distribution List. When you schedule the report, schedule it to go to the distribution list that you have setup, knowing that the CONTENTS of the report will be based on the school visibility, permission, and employee type profiles that have been granted to each user.



If you are unclear as to who is part of a particular distribution list, you can simply click the 

button in order to be reminded as to who is part of the list. Also – note that you have complete control over the email subject line, as well as the email message itself. See also that you can elect **not** to send empty reports. This can be a snazzy way to set up a report only to send an unfilled job alert if you have jobs that are still unfilled as of a certain time (provided your filter on the report is set to only display info for unfilled jobs).

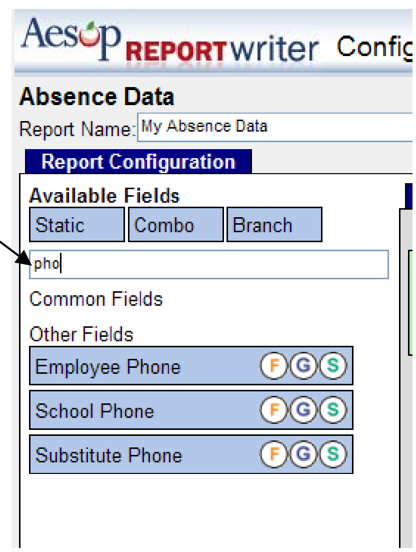


Advanced Report Writer Features:

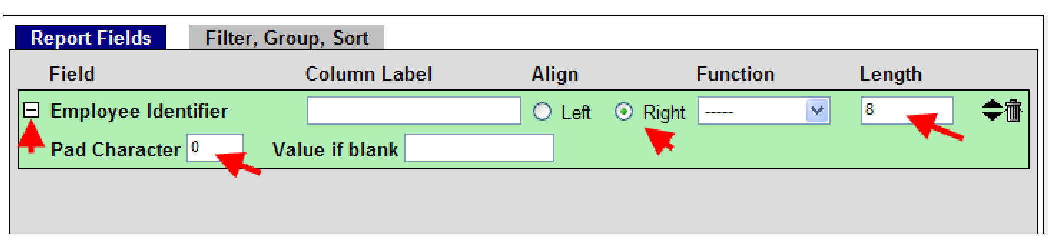
Now that you have the basics down, let's talk about some of the advanced features of the report writer. We will talk about the following:

* Searching for a field
* Functions
* Padding a Character
* Aligning to left or right
* Format Options
* Assign Values to Ranges
* Static Fields
* Combo Fields
* Branch Fields

Field Search: Because of the sheer number of fields that are available in the report writer, it can be nice to have the option to "search" for a particular field by name. Once you begin typing the name of the field that you wish to look for, the system will immediately display the names of the fields that match

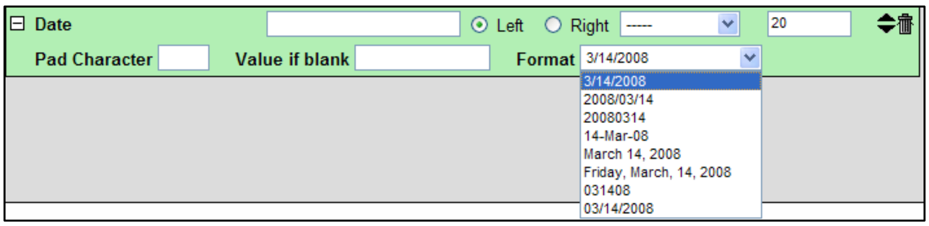


Padding Characters and **Aligning** to the left or right: These are used mostly for the creation of payroll files in a fixed length format. In some cases, your payroll system may need to have the employee number listed as a 8 digit value. However, because some employees may have employee numbers that are less than 8 digits, you may need to display that value aligned to the right, and pad the value with zeroes in order to allow the data to transition to your payroll system. (example). The below is an example of this setup.

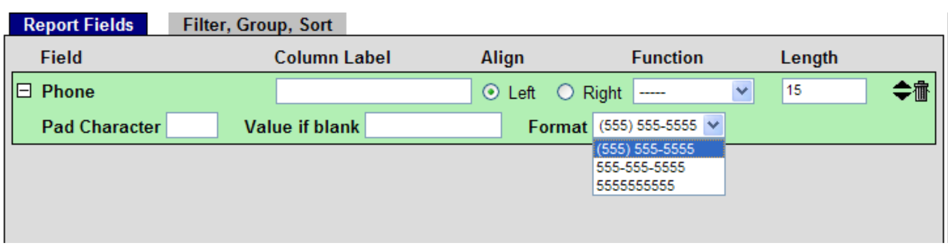


Formatting Fields:

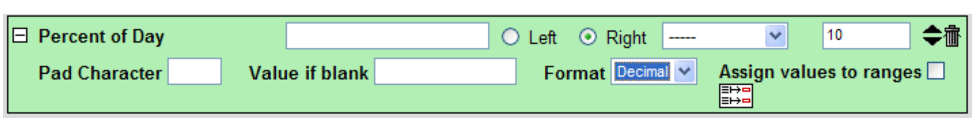
Fields can be formatted in a number of ways. To access the formatting options for a certain field, click the small plus sign to the left of the field name after adding the field to your report canvas. The options for formatting the fields differ by field type. Some common formatting options are shown below:



The format for a phone number may be modified as well to meet your needs.

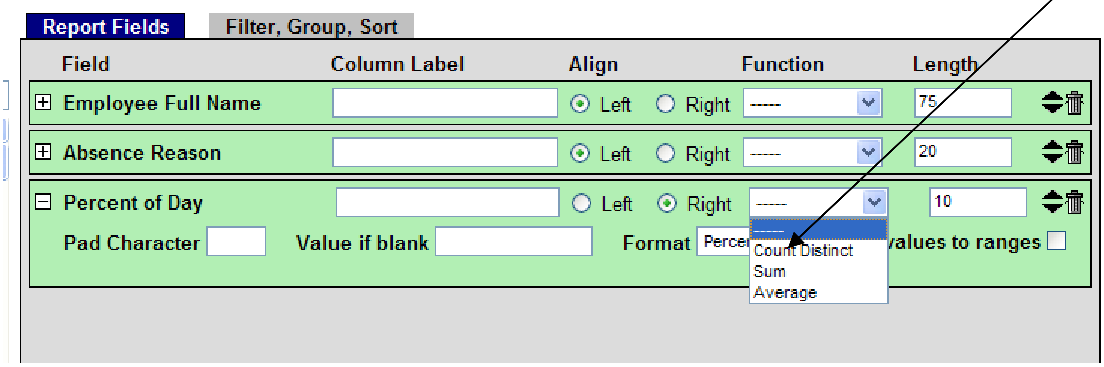


One of the most popular formatting options is to format the “Percent of Day” field to a “Decimal” value instead of a “Percent”. This will display Full Day output as a 1.0 as opposed to a 100% value.

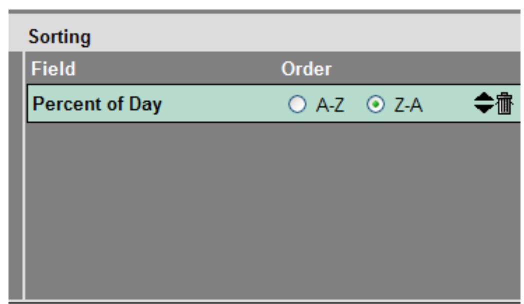


Field Functions – this feature is very popular especially for numeric fields. For example, let's take the "Percent of Day" field that you learned how to set in a decimal value in the last step. Wouldn't it be great to be able to add all of those 1.0's for Full Days together?

Using the "Sum" function on the percent of day field, this will actually take the number of times that certain employee took a particular absence reason and add the days together for whatever date range you have specified. Functions include "Sum", "Count Distinct" and "Average" for numeric fields



Then, if you SORT the data in descending order, that will show you the summed values from the MOST to the LEAST absent employee.



By adding the "absence reason" column in your report, you will get the totals by employee for each absence reason. If the absence reason were taken out, you would get the totals by employee regardless of the absence reason selected.

Sheldon, Mike	BEREAVEMENT	28.00
Willaims, Clyde	Personal Time Off > Emergency Leave	24.00
Crilley, James	Personal Day	23.50
Custodian	(Vacancy Position)	21.00
Zoes, Victor	BEREAVEMENT	20.00
Apple, Larry	Sick Day	19.50
Floater	(Vacancy Position)	19.50
Bueller, Ferris	Assault Lv-Cnslt Sup	19.00
Walker, Brian	Assault Lv-Cnslt Sup	19.00
Shahidi, Suzie	Assault Lv-Cnslt Sup	17.50
Hamels, Cole	Jury Duty	15.86
Bueller, Ferris	Sick Day	13.00
Cross, Doug	Personal Time Off > Personal Leave	13.00

Assign Values to Ranges:

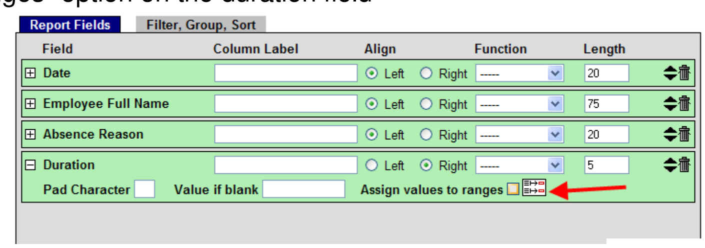
This particular feature allows you to “round” data for numeric fields, and also assign other text values based on the output of text fields. One way to use this would be for the “Duration” field. Let’s say that you want for absences that are less than 2 hours to report as 2 hours, absences from 2-4 hours to report as 4 hours, absences from 4-6 hours to report as 6 hours, and 6-8 hours to report as 8 hours. This is a perfect job for the “values to ranges” tool.

First, let’s take the duration field as it would naturally show the values. Notice how the duration column on the right is calculating the exact duration of each absence day in hours.

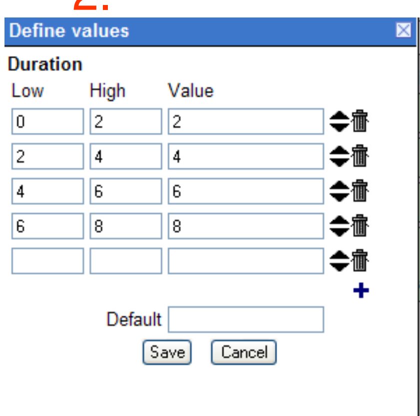
Date	Employee Full Name	Absence Reason	Duration
1/23/2010	Arnold, Colleen	Jury Duty	7.00
1/26/2010	Apple, Larry	Jury Duty	7.50
1/26/2010	Arnold, Colleen	Jury Duty	7.00
1/26/2010	Crilley, James	Personal Day	7.50
1/26/2010	Cruz, Sherry	Personal Time Off > Personal Leave	7.50
1/26/2010	Morris, Eric	Sick Leave > Immed. Family	3.98
1/27/2010	Apple, Larry	Sick Leave > Personal	7.50
1/27/2010	Arnold, Colleen	Jury Duty	7.00
1/27/2010	Bueller, Ferris	Professional Dev	7.00
1/27/2010	FUERTE, RICKY	Personal Time Off > Sick Day	7.50
1/27/2010	Haas-Davis, Leah	Bereavement > Immediate Family	7.00
1/27/2010	Kolmus, Richard	Personal Day	7.00
1/28/2010	Abrams, Steve	Personal Day	7.50
1/28/2010	Gomes, Lois	Personal Time Off > Sick Day	7.50
1/28/2010	MATSUOKA, SAM	Sick Leave > Personal	3.25
1/28/2010	Steamhouse, Matt	Personal Day	7.50
1/29/2010	Bueller, Ferris	Sick Leave > Immed. Family	7.00
1/29/2010	Faber, Chris	Bereavement > Immediate Family	7.00
1/29/2010	Goins, Aaron	Personal Time Off > Emergency Leave	3.00

Next, let’s add the “assign values to ranges” option on the duration field

1.



2.



It’s as easy as 1,2, 3! Click the box to access the tool. Set your range values, watch your output round to the values that you have specified the very next time you run the report.

3.

2/23/2010

Duration
8
8
8
8
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4
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8
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4
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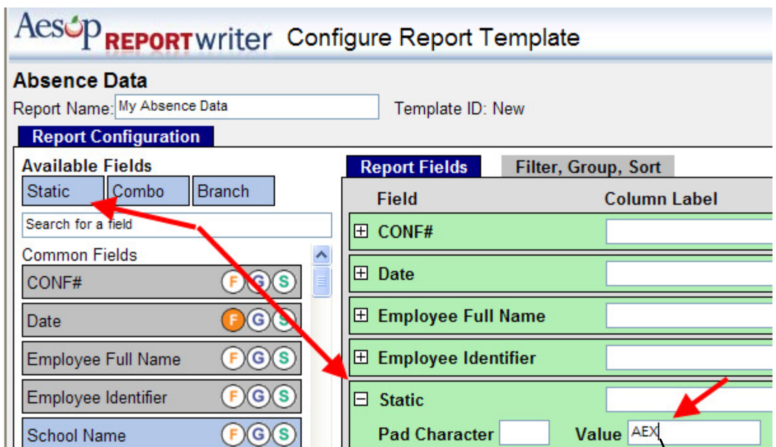
8

Static Fields: A static field is simply a million dollar way to say "I will tell you what the value of this field should be every time. When you add a Static Field to a report, all you do is indicate the value and length of the field that you would like to be shown below. This type of field is typically used when your payroll system needs information from Aesop that includes a value in a field that is not stored in the system.

If the above paragraph does not make sense to you, you probably don't need to use one of these fields. ☺ An example is shown below

Simply drag and drop the static field into your report, then simply define the value that you want to show in this field (AEX). The report output will then include that particular output in that field. The use of the static field is most commonly found when creating a "fixed length" text file for a payroll integration

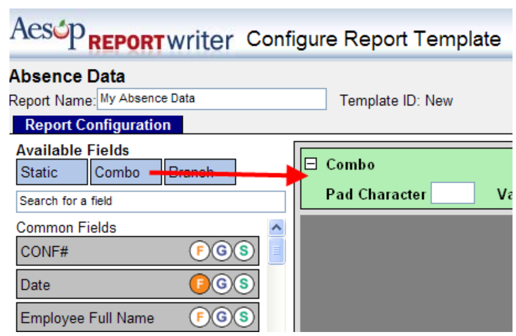


38294602	2/18/2010	Advanced English Teacher		AEX
38294603	2/18/2010	Advanced English Teacher		AEX
38294604	2/18/2010	Advanced English Teacher		AEX
38294605	2/18/2010	Advanced English Teacher		AEX
38294606	2/17/2010	Advanced English Teacher		AEX
38294607	2/17/2010	Advanced English Teacher		AEX
38294608	2/17/2010	Advanced English Teacher		AEX
38294609	2/17/2010	Advanced English Teacher		AEX
38294610	2/17/2010	Advanced English Teacher		AEX
38294611	2/17/2010	Advanced English Teacher		AEX
38294612	2/17/2010	Griffin, Tammy	651651561	AEX
38294613	2/17/2010	Advanced English Teacher		AEX
38294613	2/18/2010	Advanced English Teacher		AEX

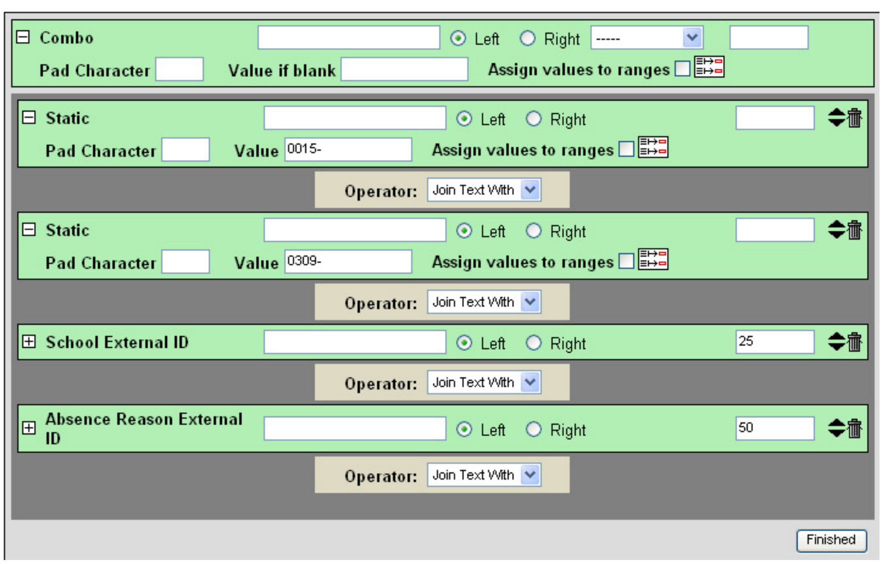
Combo Fields: these fields can be used when you actually need to dynamically create the contents of a field by using several different parts (perhaps combined with some static fields) to create a field on the fly. "Huh?", you say? Let's take an example. Accounting codes and budget codes are classic examples of where you might use these. Let's say you have an accounting code that is comprised of the following data elements:

- A code for your county of 0015 followed by a dash then
- A cost strip for your district of 0309 followed by a dash then
- The school number followed by a dash then
- A code indicating the employee type followed by a dash then
- A code for the absence reason.

Previously, you would have needed to store all of these separate codes in Aesop, and you would need to select the correct code from a gigantic drop down list. Why not see if the combo field can be put to work as follows. It would look something like that shown below. First, drag the combo field over into your report canvas, then lets start to add the fields that we need



You can see in the below screen shot that we have simply built our "combo" field based on the values found in various areas of the program. By combining static fields with external ID's, we've created a powerful combination field that will dynamically change as the underlying data elements change with each absence!

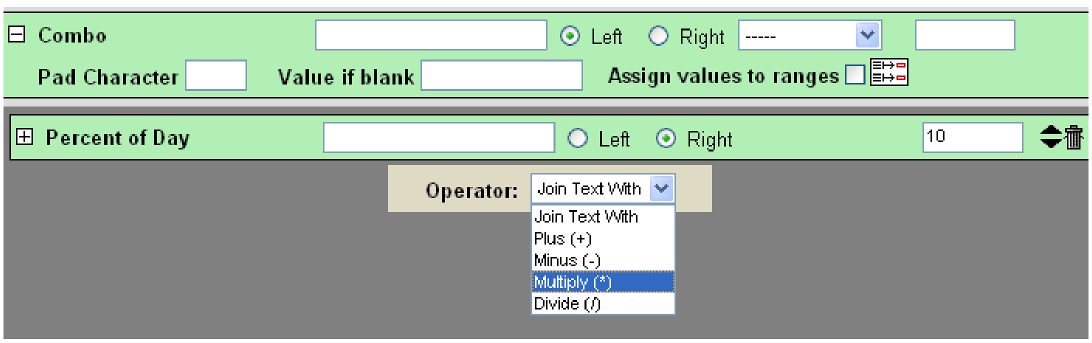


Example of output:

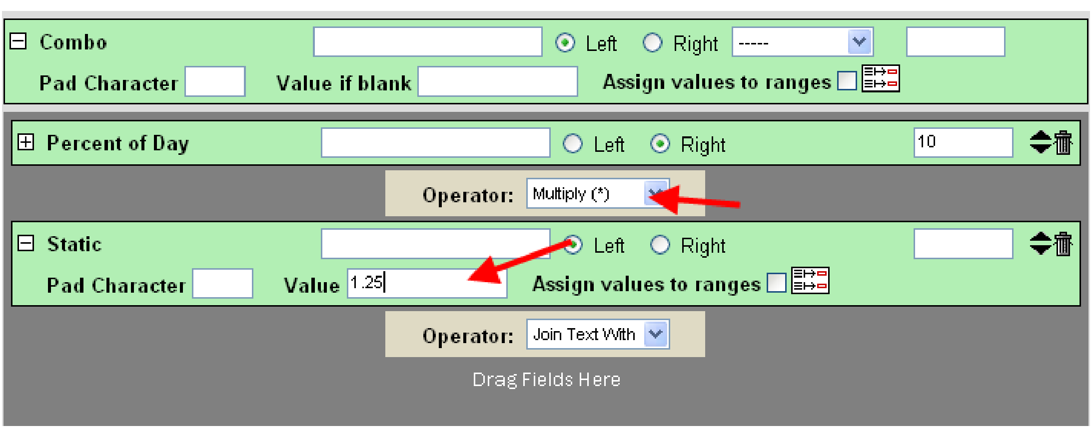
0015-0309-13211321-LGVN
0015-0309-13211321-PER
0015-0309-13211321-LGVN
0015-0309-13211321-PER
0015-0309-13211321-LGVN
0015-0309-13211321-LGVN
0015-0309-13211321-LGVN
0015-0309-13211321-LGVN
0015-0309-13211321-LGVN
0015-0309-13211321-LGVN
0015-0309-13211321-LGVN

Additionally, with combo fields, you are able to do some calculations by using the “operator” function. Let’s use the operator to take the percent of day and multiply it by 1.25 to give us 125% of the value that would have naturally been calculated.

First, create your combo field and choose the percent of day as the field you want to calculate based on:



Next, add the value that you wish to multiply the percent of day (or whatever field you have chosen) as a static field. The output will then take the percent of day and do the math within that field. Make sure if you are doing something like this that you format the percent of day to “decimal” first.

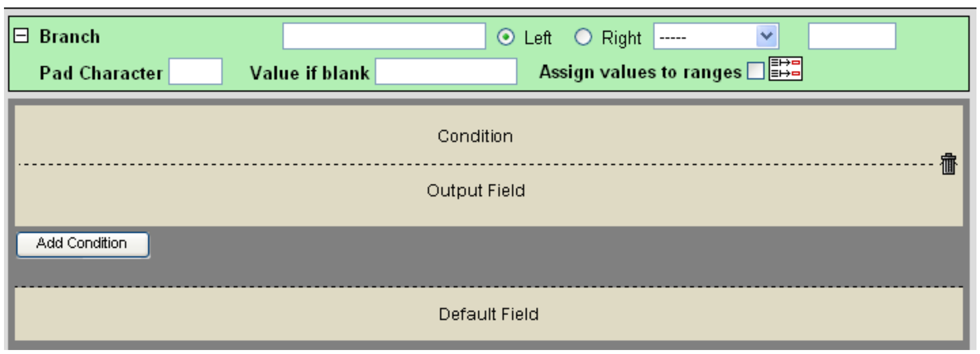


One of the great things about this feature is that you can actually add a combo field INSIDE a branch field (and vice versa) for the ultimate in flexibility. We will discuss branch fields next.

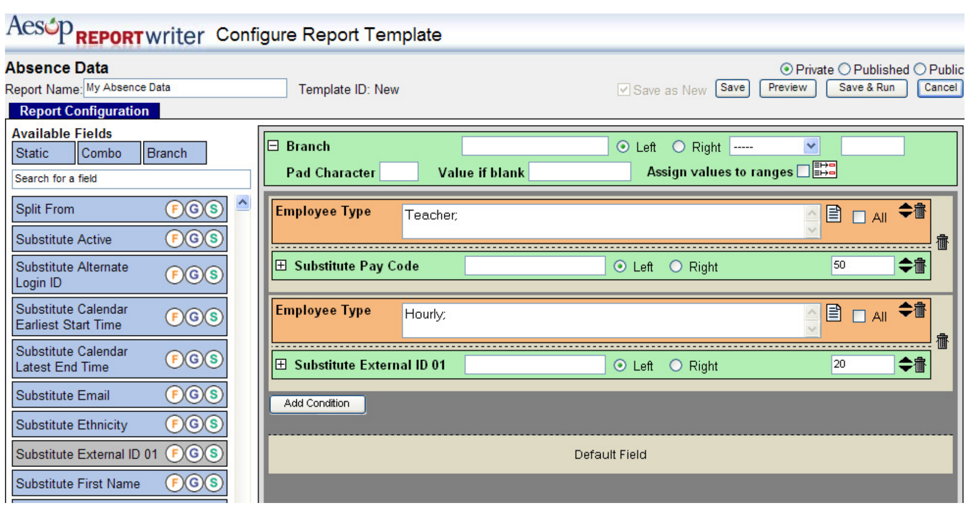
Branch Fields:

Branch fields will actually allow you to create logic WITHIN a field of the report writer. A classic case might be something like this. "If the employee type is X, then I want this certain field to pull the pay code of the substitute record. If the employee type is Y, then I want this certain field to pull the substitutes external ID. This will allow you to actually create logic in the system so that one field can pull from two different places. Included in the branch field is the ability to actually do math on the output of the field as well. In other words, if you wanted to say "if an employee type is "x", then bring in the percent day for the absence and multiply it by 1.25 (thus adding 25% to the duration of the absence). The branch field is by far the most powerful and complex type of field in the report writer repertoire, and is not for the faint of heart!

This is how the branch field looks before you supply the values:



By dragging the employee type field into the first value, we have indicated that if the employee type is "Teacher", show the substitute pay code. If the employee type is "hourly", show the substitute external ID in this field. You can add as many conditions as necessary, and you will also have the opportunity to list the "default" field if none of the conditions are met.



In conclusion, Aesop's report writer tool can be used to create ad hoc reports in a variety of formats. These formats can be created to match payroll import specifications, HR department specifications, or even the sometimes whimsical desires of your secretaries and principals. These reports can be scheduled to run at a certain time, or even set on a recurring schedule. As always, if you need help running or creating a report, don't hesitate to contact our Aesop Client Services team via phone, email, or live help.