

## Reporting: Using prompts and filters

This guide provides tips on using report prompts and filters to get just the right amount of information you're looking for. Using these tips avoids having to search through unneeded information, and helps the reports run faster, too.

### PROMPTS

#### 1 ORGANIZATION

The **Organization** prompt allows you to choose how much of the organization should be in the report.

- If you want to capture all of Geisinger, choose **Company Hierarchy → Geisinger**.
- You can choose other organization types such as Company or Service Line.

#### 2 INCLUDE SUBORDINATE ORGANIZATIONS

Be sure to click this checkbox. The report will include not only the people in the organization you selected, but all of the people in organizations that fall under the selected item, too.

#### 3 DATES

Always enter dates. It makes the report run faster.

#### 4 WORKER TYPES

This prompt allows you to select **Employees** and/or **Contingent Workers (CW)** to include in your report.

The screenshot shows a report configuration interface with the following elements:

- Organization**: A dropdown menu with a red asterisk and a callout '1'.
- Job Family**: A dropdown menu with a callout '3'.
- Time Series Start Date**: A date input field with a calendar icon, a red asterisk, and a callout '2'.
- Time Series End Date**: A date input field with a calendar icon, a red asterisk, and a callout '2'.
- Include Subordinate Organizations**: A checkbox with a callout '2'.
- Worker Types**: A dropdown menu with a callout '4'.

At the bottom, there is a filter management section with a text input for "Filter Name", a "Manage Filters" link, a "Save" button, and a status "0 Saved Filters".



**NOTE:** Not all prompts described in this job aid are available on every report, and some reports have more prompts than you see here. It all depends on which report you want to run.

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## PROMPT PARAMETERS (FILTERS)

Create a filter if you frequently use a report with the same selection criteria. **Filters you save aren't shared; they're just for you.** Name your saved filters with something that's meaningful to you.

### CREATE A FILTER

1. Enter the filter criteria.
2. In the **Filter Name** box below, type in a name for your filter.
3. Select **Save**.

This filter will now be available in a drop-down list for future use.

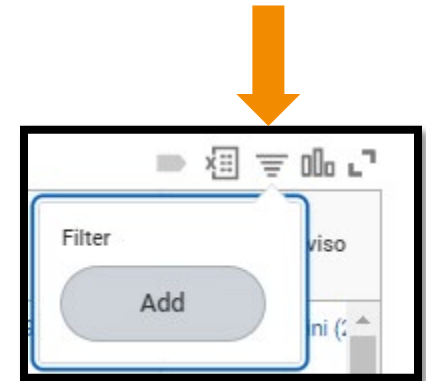
The screenshot shows a form for creating a filter. Fields include Organization, Job Family, Time Series Start Date, Time Series End Date, Include Subordinate Organizations, and Worker Types. At the bottom, there is a 'Filter Name' input field highlighted with an orange box, and a 'Save' button.

## FILTERING AND SORTING

You can use filtering and sorting to further refine report results after the report has run.

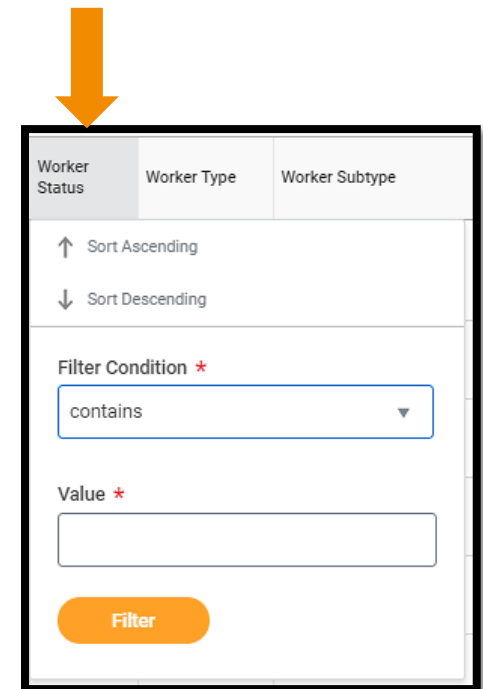
### OPTION 1

1. In the top-right of **some reports**, you will see a funnel icon. Click the funnel.
2. Click **Add**.
3. Follow the prompts to select a report column to identify how you want to filter.
4. Click **Filter**.



### OPTION 2

1. Click the column heading on the report you want to use for sorting or filtering.
2. Use the sort options, if desired.
3. Use the prompts to identify how you want to filter the report results.
4. Click **Filter**.



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### COLUMN PREFERENCES

Some reports allow you to hide, freeze, or move columns around. Your settings will be saved just for you, next time you view the report.

Click the **Columns** icon to see your options.

1. **Freeze** - If you have a very wide report layout you can **freeze** a column in place as the first column. You can then scroll right and left on the report and still see the first column of information. Drag the column to freeze into the gray box at the top of the Column Preferences menu.
2. **Hide** – Use the checkboxes next to column names to hide them on your report results.
3. **Move** – Drag the column names up and down the list to order them how you prefer.
4. Click **Apply**.



**NOTE:** If, at any time, you're not happy with how the report results look after changing column preferences, you can always click the **Reset** button. This will revert the report layout to its original default look.

