Introduction
This guide explains how to access, view and export your establishment report. Establishment reports pull together key information about staff and their employment, providing an invaluable snapshot of your organisation. The report is generated in real-time, by automatically running a pre-configured enquiry and displaying the results in table view.

Audience
Directors and Officers of the College.

<table>
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<th>What do you want to do?</th>
<th>Instructions</th>
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<tr>
<td>Access your Establishment Report</td>
<td>From the main menu, select Reports then Global reports→HR Reports→your establishment (e.g. HR, Library, School of SSHP).</td>
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Navigate the results
To navigate scroll to the bottom of the screen:
- Use the horizontal scroll bar to view columns to the right.
- Use the navigation bar to move between pages.
- Use the Rows per page setting to change the number of rows displayed (default=50).

Filter the search results
To refine the results of the search, you can apply filters on one or more columns:
- Enter the value(s) in the column header(s) then click Search.
- Use the wildcard * to ensure you retrieve all relevant values. Can be entered before or after the value.
This method is useful for basic filtering (e.g. on staff group, contract type). If you want to do more complex filtering and manipulation of the results (e.g. on dates), export the data to Excel.

"Level" buttons allow you to customise the view in reports where data is organised into sub-groups.

The Copy to clipboard button only works in Internet Explorer. If you want to export data to Excel it is better to use the Export function.

**Change the columns to display**

1. Click Choose columns at the bottom.

2. Un-check the columns you don’t want to appear in the enquiry.

**Change the layout**

- To adjust the column width grab the edge of the column and move it to the required width.
• To move columns select the column header then drag it to its new position.

• To return the layout to its original click the Reset layout button in the bottom right corner. Note: you can also see the total number of rows in the table and a time stamp telling you when the report was run.

Export the results

1. Click the Export button. The Report Engine window opens.

   Choose columns   Graphical presentation   Create widget   Export

2. Select the format to export to:

   b. Pre-defined [.pdf] – outputs pre-formatted data to PDF.

The remaining options are typically used by super users.

Where to go for help
For data queries please check the ‘your employees’ section in Business World, or contact your HR officer. For additional data requests contact Robert Morrison (HR Data Analytics & Information Systems Manager).