# MyView Guidance ResourceLink Reporting Services (RRS)

## For Managers

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carmarthenshire.gov.wales



### ResourceLink Reporting Services (RRS)

#### Introduction

RRS provides the facility for Managers to view/extract predefined information about their staff in real-time from the HR/Payroll System (ResourceLink).

The staff information that is accessible through RRS is based on the post-to-post reporting lines that are set up within the HR/Payroll system (which you can view through your MyPeople tab).

These reports are reviewed, updated, and additional reports are published regularly so please keep checking this service for updates.

#### Accessing the Reporting Services (RRS)

Login in to MyView using one of the following internet browsers:

- Microsoft Edge
- Google Chrome
- Safari

**Please Note:** Reporting Services will <u>not</u> work if you access MyView using Internet Explorer. Reporting Services will be available in the left-hand menu in both your **Me** and **My People** tab, **click** on Reporting Services (RRS).

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Me My People	Q / Team Selector				
Not Selected	Team Selector				
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	Direct Reports for DARIA POLOWSKA	Showing 1 res	ults (0 vaca	nt) / 0 Se	elected
	Select All Deselect All				
	LOWRI WILLIAMS				
	Trade Waste Loader (013771)		Select		+
	- Ø 600003				

Reporting Services will then open in a new tab in your browser:



#### Browsing the Repository

From the landing page any reports you have previously accessed will display in your Recently Viewed Items, if this is your first login this list will be blank, and you will need to access the repository page to find the reports which have been published for you to utilise. To browse the repository, select **View** in the blue title bar, then **Repository** from the dropdown menu:



You will need to expand the folders that appear in the repository to access the reports that have been published:

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Click on the + on the CT folder to reveal the CCC folder.

**Click** on the **+** button against each folder in the left-hand pane to expand to the next subfolder until you get to Adhoc reports which will have 3 folders Employee, Manager and Staff. The manager folder will expand to reveal 2 further folders, Absence and L&D. The contents of each repository folder can be viewed in the right-hand pane.



The buttons at the top of the Repository pane allow you to open and run reports. To select a report, click on the report title.

#### **Running Reports**

To run a report, you can either click on the report title, if you right click on the report title you will be given various options:



#### At present we recommend either clicking Run or Run in New Tab:

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1WDP	WELCOMING DISABLED PEOPLE	EQUALITY16	1	Days				02-10-2006					
1WLDEVGY	IMPROVING YOUR WELSH: WRITTEN	WELSHLAN15	3	Hours				11-06-2007					
1EQPROJAGE	EQUAL PROJECT AGE MODULE	EQUALITY16	1	Hours				26-08-2007					
1EQPROJDIS	EQUAL PROJECT DISABILITIES	EQUALITY16	1	Hours				26-08-2007					
1EQPRO/GEN	EQUAL PROJECT GENDER MODULE	EQUALITY16	1	Hours				26-08-2007					
1EQPROJREL	EQUAL PROJECT RELIGION & BELIEF	EQUALITY16	1.5	Hours				26-08-2007					
1EQPROJSOR	EQUAL PROJECT SEXUAL	EQUALITY16	1.5	Hours				26-08-2007					
1EQPROJWL	EQUAL PROJECT: WELSH LANGUAGE	EQUALITY16	1.5	Hours				26-08-2007					
1CEXCONF	CHIEF EXECUTIVES CONFERENCE	LEAD 8/MAN07	0.5	Days				28-09-2007					
1DATABA	DATA PROTECTION - COURSE	POLCYPRO20	2	Hours				04-11-2008					
1DSEINT	DSE INTERACTIVE	HELTHSAF06	0.5	Hours				28-05-2009					

The report output will display on screen (employee numbers and names have been redacted from the example above).

There are a number of different formats of report which have been published, however the functionality within each report remains the same:

- Exporting the report
- Navigating the report
- Searching within the report
- Filtering columns within the report
- Amending the predefined report filters (based on your security permissions)

#### Navigating the toolbar:

Using the Report Column functionality:

Within each report you can set individual filters on each column within the report or you can change the formatting or sort on that column.

**Left click on the column heading** and these additional options will appear in the order they are mentioned:

- Formatting Columns allows you to show or hide the columns in the report
- Column Filters The column filters icon will allow you to define an individual filter for that column using predefined filter definitions dependent on the field type e.g:

	ilter column: Start Date		
	Show all rows		
	Show only rows where		
	Equals		
	Equals		
	• · · · · · · · · · · · · · · · · · · ·		
	Is not equal to	ОК	Cancel
	Is not equal to Is between	ок	Cancel
00	Is not equal to Is between Is not between	ок 474	Cancel
00	Is not equal to Is between Is not between Is on or before	ок 474 592	Cancel A A
00	Is not equal to Is between Is not between Is on or before Is before	ок 474 592 437	Cancel A A A
00	Is not equal to Is between Is not between Is on or before Is before Is on or after	ок 474 592 437 314	A A A A

Click on the Show only rows where radio button and select the filter to be used. **Please note:** this field is case sensitive so will only return exact matches use the Contains option if you are unsure.

F	ilter column: Forename			
	O Show all rows			
	Show only rows where			
	Equals			
	Equals			
	Is not equal to		ок	Cancel
	Contains			
900	Does not contain			A
900	Starts with		· -	A
300	Does not start with			A
	Ends with			
900	Does not end with			A .

You can apply multiple filters within a report (1 per column) and then export the filtered report to continue any further filtering that maybe required.

- Sort ascending and descending
- Column size

Icon	Name	Description
₽	Formatting/Show column/Hide column	Select Formatting to open the Format Column box. Select Show column or Hide column to show or hide the column.
Y	Column filters	Click to open the Filter column box.
1	Sort ascending	Click to sort fields on the selected column in ascending order.

Icon	Name	Description
+	Sort descending	Click to sort fields on the selected column in ascending order.
•	Column size	Click and drag this icon to make columns wider or narrower.

**Toolbar Buttons** 



The **Back** button will take you back to the repository. On the same bar as the back button from left to right is the save, export, undo, redo, undo all and the input controls. The input control icon shows you the filters applied to the report that has been run. There is also a table below describing all the buttons.

Icon	Name	Description
В	Export	Click this icon to export the View into one of the available formats.
*	Undo	Click this icon to undo the most recent action.
*	Redo	Click this icon to redo the most recently undone action.
Ð	Undo All	Click this icon to revert the report to its state when you last saved.
	Input Controls	Click this icon to see the input controls applied to this report. For more information, refer to "Simple Input Controls".
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You can resize the display by clicking the – or + symbols or adjusting the size using the drop down.

lcon	Name	Description
Ø	Refresh report with latest data	Click this icon to refresh the report data against the data source.
44	First	Click this icon to jump to the first page of the report.
•	Previous	Click this icon to go to the previous page in the report

You can navigate to a different page by typing in the page number and pressing enter or by clicking on the arrow keys either side of the page number field.

Exporting the Report:



To export the report click the **Export** button and select an export format from the drop down box. We advise you to save the report as Excel, XLSX or PDF.

Save the report in the file format you require the table below gives you advice on the appropriate format for your report and troubleshooting export issues.

File Format Option	Format Name	Usage
PDF	Adobe Acrobat	To prevent horizontal truncation of an Ad Hoc report when exported, set the Actual Size option in the Ad Hoc Editor.
Excel (Paginated)	XLS	Not recommended for exporting most tables or crosstabs. Repeats headers and footers on each
Excel	XLS	Ignores page size and produces spreadsheet-like output.
CSV	Comma Separated Values	Characters outside the Latin 1 character set can cause the Excel spreadsheet to look unacceptable. Try saving the file and importing it using Excel's Import functionality.
DOCX	Word	Do not export reports having more than 63 columns. In Microsoft Word, you cannot create tables having more than 63 columns.
RTF	Rich Text Format	Creates a large output file and, therefore, takes longer to export than PDF, for example.
ODT	OpenDocument Text	For best results, minimize the number of rows and columns and make sure they don't overlap.
ODS	OpenDocument Spreadsheet	Same as ODT.
XLSX (Paginated)	Microsoft Open XML Format Spreadsheet	Not recommended for exporting most tables or crosstabs. Repeats headers and footers on each page.
XLSX	Microsoft Open XML Format Spreadsheet	Ignores page size and produces spreadsheet-like output.

Input Controls:

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The input controls button allows you to check/amend the predefined report filters set for the report. It is recommended that **only** date controls are amended by users using this functionality:

ut Controls		
Start Date between		^
2016-10-17 00:00:00		
and		
2017-10-17 00:00:00		
Attended		
Available: 10	Selected: 2	
Search list		Q
[Null]		^
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V		×
Apply OK Reset Cancel	Save	

Date fields can be amended by clicking on the calendar button to the right of the date field:

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Мо	Tu	We	Th	Fr	Sa	Su			
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3	- 4	5	6	7	8	9			
10	11	12	13	14	15	16			
17	18	19	20	21	22	23			
24	25	26	27	28	29	30			
31									
Time: 00:00:00									
Hour									
Minute									
Second									
No	w			Close					

You can then select the appropriate date range by navigating to the appropriate month and year and then clicking on the required day of the month or by clicking on the **Now** button. Please note: if the **Now** button is clicked then the **Time** will need to be adjusted to 00:00:00 using the scroll bar against the Hour, Minute and Second.

Upon selecting the required dates, click **Apply** and then click **OK**. Reset will return the prompts to the original setting, Cancel will take you out of this screen without saving any adjustments and Save will keep save your prompt amendments based on your security profile.

#### Search the Report:

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÷	100% +	search report	े ∢ ►			Page	1	of 426	►	••
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The search report functionality allows you to type specific text that you would like to highlight in a report e.g. if you would like to highlight the surname DAVIES type DAVIES in the search bar and click on the magnifying glass/press enter and the first instance of the surname DAVIES will be highlighted.

#### Returning to the Repository:

To exit a report click the **Back** button.

#### **Exiting Reporting Services:**

Click on **Log Out** in the top right-hand corner of the window.

Should you have any queries about Reporting Services (RRS) reports please email resourcelink@carmarthenshire.gov.uk