

## Reports Training Agenda 1 Hour Online Course

### Using the Report Wizard

- How to get to the Report Wizard
- Impact of Roles on Reporting
- Building Reports
  - Difference between “canned” reports and custom reports
  - Description of Categories
  - Walk through of employee birthday list
    - Difference between specific date and calculated date
    - Condition vs. Criteria
      - Selecting the reporting criteria
      - Narrowing criteria by other fields in Ascentis HR (Field 1)
    - Report viewing options
  - Walk through of benefit remittance report
  - Description of type of custom reports
    - Build custom report without history
    - How to export report to file
  - Build custom report with history
- Difference between Report Wizard on side bar and drop down menu on top bar
- Modify a saved report
- Print a saved report
- Manage reports
- Tricks and Tips
  - Organizing reports
  - Using criteria selections to audit data