# **Beyond - Profile Reports**

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#### Overview

The "Reports" charm has been added to record types within Beyond to allow for easy access to reports directly related to the intended record type.

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Employee	Job Title	

The "Reports" charm has been added to the following record types within Beyond:

- Employee
- Customer
- Contact
- Assignment
- Job Order

This article covers the following:

- 1. Setting Up Permissions
- 2. Searching Reports
- 3. Selecting Report Favorites
- 4. Record Type Specific Reports

#### **Setting Up Permissions**

The only permissions required for this functionality relate to the report access that a user has.

Therefore, the reports that appear within the "Reports" charm on the specific record type, translate directly to the reports the user has access to via Security Groups.

\*Note\* If you utilize custom Security Groups with Advanced Permissions, please verify intended access to "Reports" fields and pages within the Security Groups that require the functionality:

BY PAGE	BY FIELD	Selecting a parent selects children 🗹
Q report	$\times$	
▲ Employee		Access
Reports Page		Access
∧ Customer		✓ Access
Reports Page		Access
▲ Contact		Access
Reports Page		Access
∧ Job Order		✓ Access
Reports Page		Access
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For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "Beyond - Creating Security Groups with Advanced Permissions".

### **Searching Reports**

To view all the reports tied to record types in Beyond, begin by navigating to B Menu > Reports:



Within the "Reports" screen, you will have the ability to do the following:

- Search for a specific report
- View reports based on the Report Group
- View reports based on the Record Type
- View favorite reports
- View all reports

Q Search report name or description	All Report Groups	✓ All Record Types	~	
	FAVORITES	ALL REPORTS		
Showing 0 of 0			(i)	

To view all reports related to an individual record type, select the "All Record Types" dropdown, and select the record type you would like to view the reports for (in this example, we will choose Employee Reports):

Q Search report name or description	All Report Groups 🗸 🗸		All Record Types	^		
	FAVORITES	ALL REPO	All Record Types			
Showing 0 of 0			General Reports (No record type)		Û	
			Employee Reports		0	
	No rep	orts	Customer Reports			
			Contact Reports			
			Job Order Reports			
			Assignment Reports			

After selecting the record type that the reports are associated with, and selecting the "All Reports" tab, you will see a list of employee related reports based on the report access granted via your assigned Security Groups:

<b>Q</b> Searc	h report name or description	All Report Groups	✓ Employee Re	ports	V CLEA	R FILTERS 🗙
		FAVORITES	ALL REPORTS			
Showing	g 20 of 147					í
B	Application Survey Results Displays a list of employees with their Insight :	survey results.		Employee	Employee Info	☆
E	California EITC Notification Federal Earned Income Tax Credit Notification	which is required to send to al	Il California employees.	Employee Em	loyee Reporting	☆
E	Current Timecard Change Log Displays a list of changes made to current tim	L Employee	Log Information	☆		
B	Employee Adjustment Setup Change Log Displays a list of changes made to employee a	g djustment setup records betwe	een a given date range.	Employee	.og Information	☆
B	Employee Application Shows standard application information for a and answers to the online questionnaire.	given employee. Shows employ	yee name, address, phone, email,	Employee	Employee Info	$\overrightarrow{\Delta}$
B	Employee Application HR Center Shows all application information for a given e answers to the online questionnaire.	mployee. Shows employee nar	me, address, phone, email, work e	Employee	Employee Info est codes and	☆
	Employee Audit Displays a list of changes made to employee r	ecords between a given date ra	ange.	Employee Em	loyee Reporting	☆
	Employee Change Log Displays a list of changes made to employee r	ecords between a given date ra	ange.	Employee	.og Information	$\Delta$

\*Note\* The above example is for employee reports. The same process applies when selecting reports for the

other following record types:

- Customer
- Contact
- Assignment
- Job Order

With the list of reports gathered, we will now favorite the reports we want to appear directly within the "Reports" charm.

#### **Selecting Report Favorites**

Per the previous example, we will be favoriting employee reports to appear directly within the "Reports" charm on the employee record.

To favorite a report, select the star symbol next to any of the reports:



Once the star has been selected, the report will be marked as a favorite:

Q Search report name or description	All Report Groups	✓ Employee R	eports 🗸	CLEAR FILTERS
	FAVORITES	ALL REPORTS		
Showing 20 of 147				(j
Application Survey Results Displays a list of employees with their Insig	ht survey results.		Employee Employee	yee Info 🕁
California EITC Notification Federal Earned Income Tax Credit Notificat	ion which is required to send to all (	alifornia employees.	Employee R	eporting 🕁
Current Timecard Change Log Displays a list of changes made to current t	imecard records between a given da	ste range.	Employee Log Info	rmation 🔶
Employee Adjustment Setup Change I Displays a list of changes made to employe	.0g e adjustment setup records betwee	n a given date range.	Log Info	rmation 🛨
Employee Application Shows standard application information for and answers to the online questionnaire.	r a given employee. Shows employe	e name, address, phone, email	Employee Employee Employee	st codes
Employee Application HR Center Shows all application information for a give answers to the online questionnaire.	n employee. Shows employee name	, address, phone, email, work	Employee Employee experience, education, interest code	yee Info es and 🕅 🛣
Employee Audit Displays a list of changes made to employe	e records between a given date ranį	3e.	Employee R	eporting 🕁

To view all favorited reports, select the "Favorites" tab:

Q Search report na	me or description	All Report Groups	✓ Employee Reports		~ CL	EAR FILTERS
		FAVORITES	ALL REPORTS			
Showing 4 of 4						i
Current 1 Displays a	Imecard Change Log list of changes made to current tim	ecard records between a given d	ate range.	Employee	Log Informatio	n 🛨
Employe Displays a	e Adjustment Setup Change Log list of changes made to employee a	g adjustment setup records betwee	n a given date range.	Employee	Log Informatio	n 📩
Shows sta and answe	e Application dard application information for a rrs to the online questionnaire.	given employee. Shows employe	e name, address, phone, email, work e	Employee experience, educa	Employee Int tion, interest code	fo es 🌟
Employe Displays a	e Change Log list of changes made to employee r	records between a given date ranj	ge.	Employee	Log Informatio	an 📩

With the selected reports favorited, we can move on to see how the reports appear and function within the "Reports" charm on the employee record.

### **Record Type Specific Reports**

\*Note\* While the below example is for employee reports, the same process applies for the other following record types:

- Customer
- Contact
- Assignment
- Job Order

Begin by navigating to an employee record you would like to view a report for:

<	Christopher Robin (4295097670) SSR: 111-22-4444 ← ♀ Eagan. MN S5121								Active	E Reports	) Assignments	S E	A Web Use	r Interviews	i Onboarding	E E-Verify	Sync To Sense	<b>≡</b> , Tasks	Alerts Bo	okmark More		
Bookmarks	^	VISIFILE	DETAILS 🗸	DOCUMENTS	MESSAGES	JOB MATCHING	ASSIGNMENTS	STORY	REFERENCES	PAY SETUP 🗸	ONBOARD	ING PAY	THISTORY 🗸	CUSTO	M DATA V	VIKI PAGE	DATAFRENZY	EMPLOYEE	PAGE MO	RE 🗸		t≡
No bookmarks add	ed.	∧ Sna	apshot																			
Christopher	•	Id 429509	7670								Hire Stat Eligible f	us or Hire	>									
Employee Search		Job Titl	e																			

Select the "Reports" charm on the employee record to see the list of favorited reports related to the employee record type:

<	Christophe SSN: 111-22	r Robin (4295097670) -4444 · 홋 Eagan, MN S	55121						Active	E Reports	Assignments	S E	+ <b>2</b> A Web Us	er Interview	) Onboarding	E E-Verify S	Sync To Sense	<b>≣</b> y ( Tasks Ab	rts Book	J:
Book	marks 🔨	VISIFILE DETAILS V	DOCUMENTS N	MESSAGES JOB MATC	ING ASSIGNMENTS	STORY	REFE	Employee Reports			Y HISTORY 🗸	CUSTO	M DATA	WIKI PAGE	DATAFRENZY	EMPLOYEE	PAGE MOR	KE 🗸		1Ξ
No		. Countrat						3 FAVORITE REPORTS		_										
Recer	nt History	∧ Snapsnot						Employee Messages	5											
*	Christopher	ld 4295097670						Employee Change L	.og		>									
۵	Reports 📋	Job Title						E Employee Hours												
	Employee							VIEW ALL EMPLOYEE R	REPORTS											-
<b>A</b>	Dashboard 📋	✓ Note																		

Selecting one of the favorited reports will open the report and automatically populate the relevant employee information based on the record.

Selecting "View All Employee Reports" will bring you to a list of all employee related reports, directly within the

#### employee record:

Christopher Robin (4295097670) SSN: 111-22-4444 · 💎 Eagan. MN 55121	e 📴 📋 😧 🗘 📩 💭 🔤	Ξ Ε 🔇 ☴, 🚺 Ω : carding E-Verify Sync To Sense Tasks Alerts Bookmark More
Bookmarks Added. No bookmarks added. Recent History A Vorlistopher	SAGES JOB MATCHING ASSIGNMENTS STORY REFE Employee Reports > Number Reports ■ Employee Messages ■ Employee Change Log ■ Employee Hours	renzyemployee page more ♥ 1Ξ
Employee     South     Christopher Robin (4295097670)	VIEW ALL EMPLOYEE REPORTS	€ 6 € € 0 1 1
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Christopher : Christopher : Christopher :	Q Search report name or description Showing 20 of 20	Ō
Reports     Employee     Search     Desbhaard	Application Survey Results     Employee Info Displays a list of employees with their insight survey results.     Earliers ETC Notification     Research Terrel Result Results     Research Terrel Research Research Terrel Research Research Research     Research	☆ ☆
	Current Timecard Change Log Diploys a list of changes made to current timecard records between a given date range.	☆
	Employee Aquisament Setup Change Log     Log Information     Displays a fair of changes made to employee adjustment setup records between a given date range.     Employee Application     Employee Application     Shows sanded application information for a given employee. Shows employee name, address, phone, email, work esperience, education, interest codes	☆
	end answers to use writing detectionmere.  Employee Application HR center  Shows a deplotation information for a given employee. Shows employee name, address, phone, email, work experience, education, interest codes and answers to the online questionnaire.	*
	Employee Audit         Encodover Reporting           Displays a list of dranges made to employee records between a given date range.         Encodover Reporting           Employee Change Log         Encodover a given date range.         Encodover Reporting	☆ ★

Within this screen, you have the ability to do the following:

- Search for reports that relate to the specific record type
- Favorite and un-favorite reports related to the specific record type
- View reports related to the specific record type

Viewing the report within this screen will also automatically populate the relevant employee information based on the record.

## **Related Articles**