

# MyView Guidance ResourceLink Reporting Services (RRS)

## For Managers

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[carmarthenshire.gov.wales](http://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).

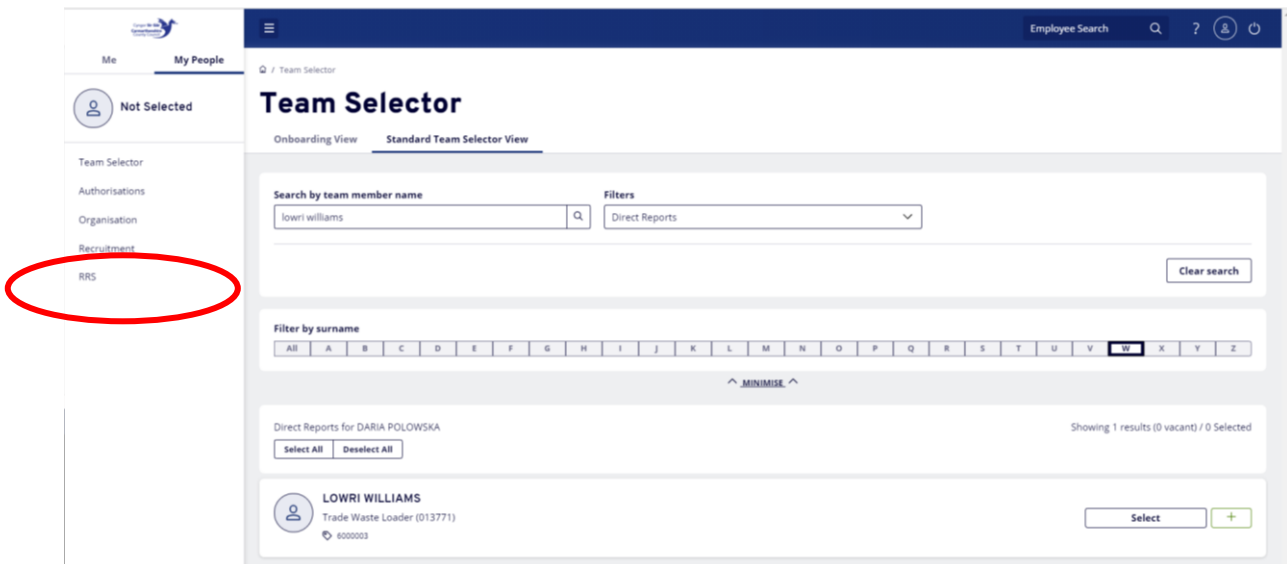
These reports are reviewed, updated, and additional reports are published regularly so please keep checking this service for updates.

## 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 not 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).



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



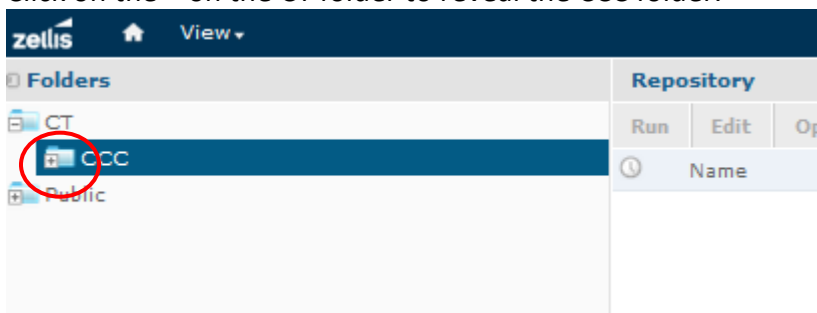
## Browsing the Repository

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:

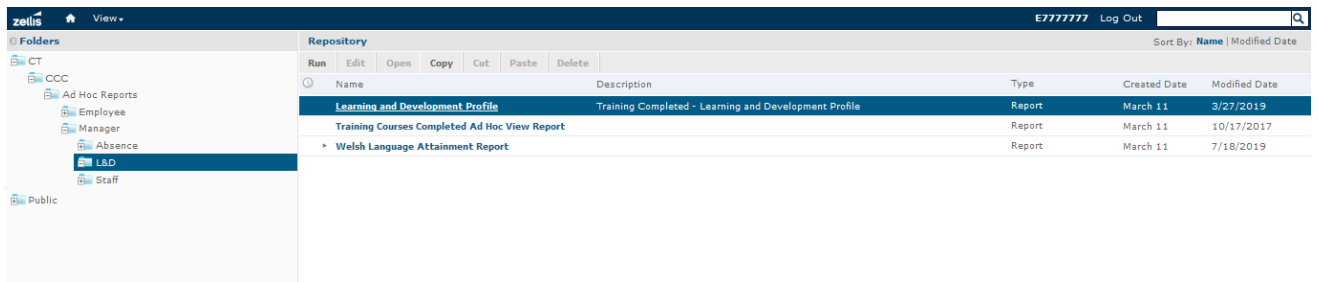


You will need to expand the folders that appear in the repository to access the reports that have been published:

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



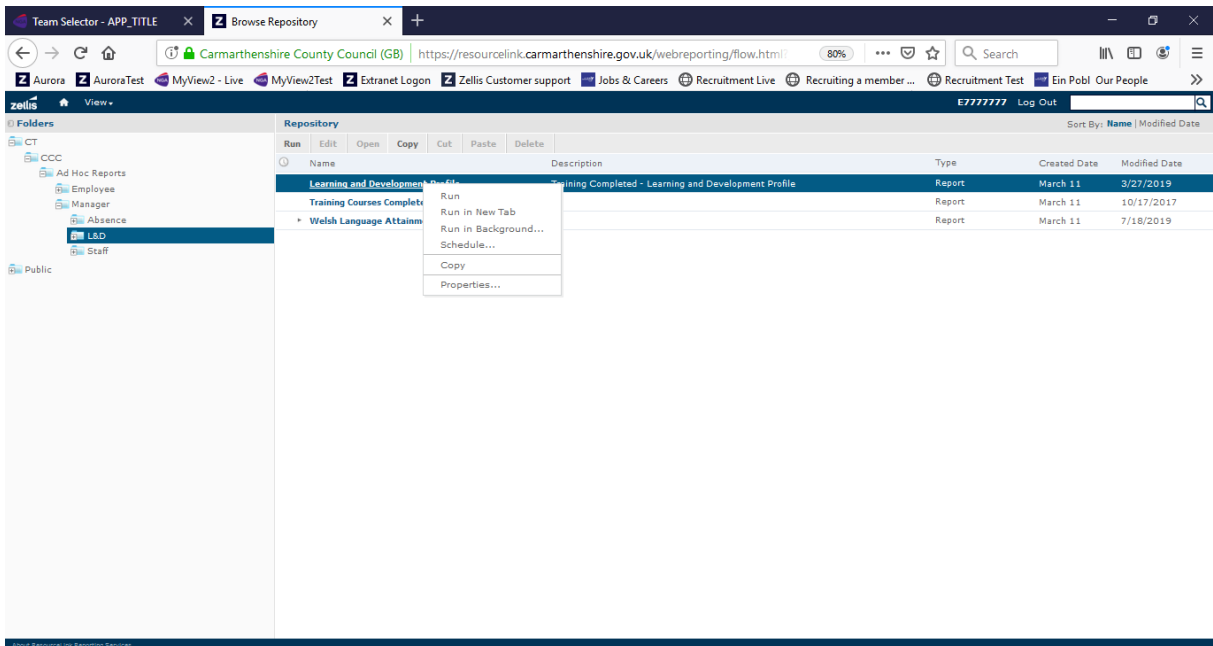
**Click** on the + button against each folder in the left-hand pane to expand to the next sub-folder until you get to Adhoc reports which will have 3 folders Employee, Manager and Staff. The manager folder will expand to reveal 2 further folders, Absence and L&D. The contents of each repository folder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



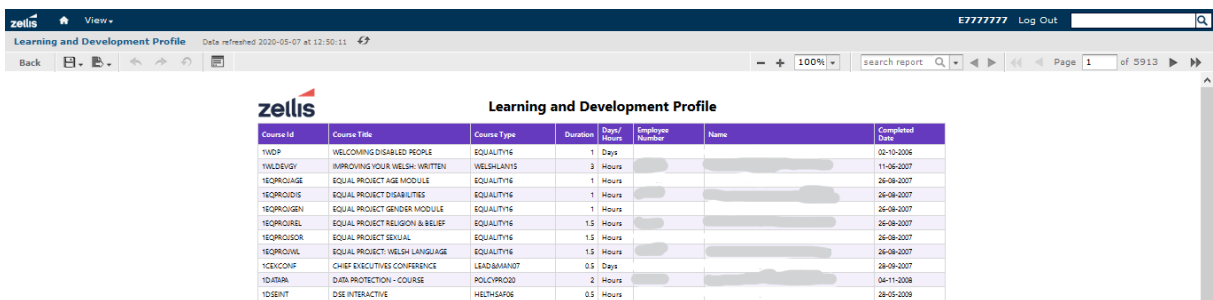
The buttons at the top of the Repository pane allow you to open and run reports. To select a report, click on the report title.

## 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**:



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 dependant on the field type e.g:

Filter column: Start Date

Show all rows

Show only rows where

Equals

Is not equal to

Is between

Is not between

Is on or before

Is before

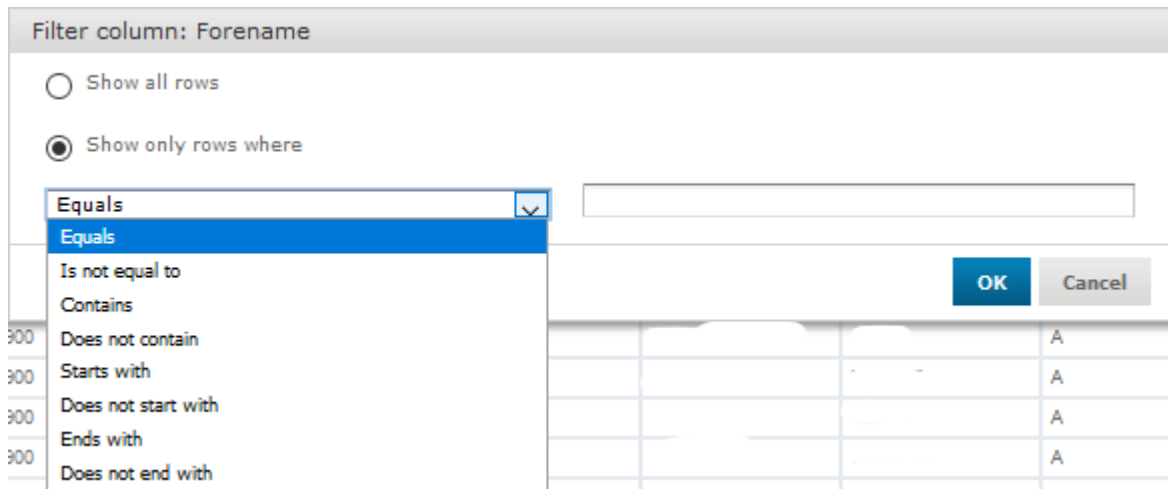
Is on or after

Is after

OK Cancel

474			A
592			A
437			A
314			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.



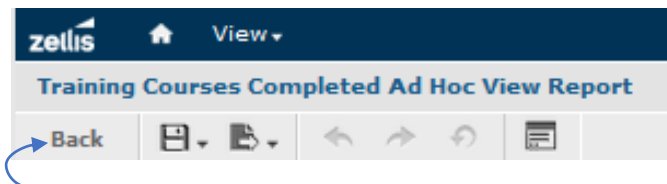
You can apply multiple filters within a report (1 per column) and then export the filtered report to continue any further filtering that maybe required.

- 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.
	Column filters	Click to open the Filter column box.
	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.

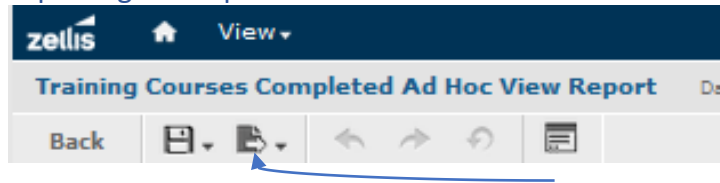
Icon	Name	Description
	Export	Click this icon to export the View into one of the available formats.
	Undo	Click this icon to undo the most recent action.
	Redo	Click this icon to redo the most recently undone action.
	Undo All	Click this icon to revert the report to its state when you last saved.
	Input Controls	Click this icon to see the input controls applied to this report. For more information, refer to "Simple Input Controls".

You can resize the display by clicking the – or + symbols or adjusting the size using the drop down.

Icon	Name	Description
	Refresh report with latest data	Click this icon to refresh the report data against the data source.
	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:



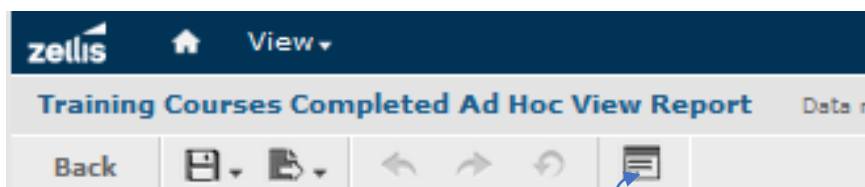
To export the report click the **Export** button and select an export format from the drop down box. We advise you to save the report as Excel, XLSX or PDF.



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.

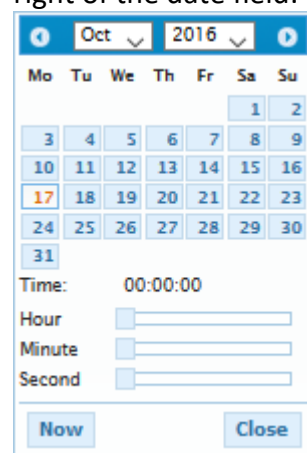
<b>File Format Option</b>	<b>Format Name</b>	<b>Usage</b>
PDF	Adobe Acrobat	To prevent horizontal truncation of an Ad Hoc report when exported, set the Actual Size option in the Ad Hoc Editor.
Excel (Paginated)	XLS	Not recommended for exporting most tables or crosstabs. Repeats headers and footers on 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:



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:

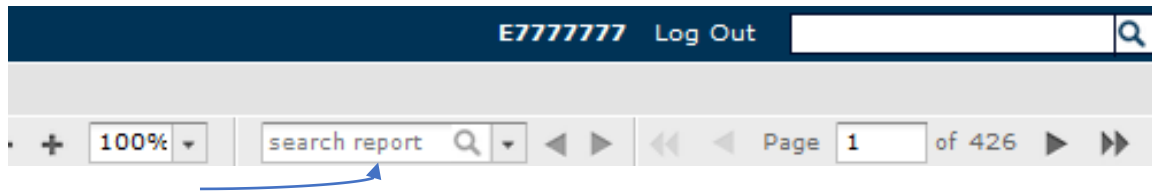
Date fields can be amended by clicking on the calendar button to the right of the date field:



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:



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](mailto:resourcelink@carmarthenshire.gov.uk)