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Overview

The User Report Writer lets you create, edit, delete and print customized reports. A user report may be created at the system or company level. User reports can be generically generated to a new browser window or to a Microsoft Excel file.

Each user report requires a user report type that will determine which fields can be added to a user report.

Note: *A user's security may limit what companies, employees or encrypted fields will be displayed on a user report*

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GROW/AssignmentPro Reporting Options

In addition to user reports, production reports and exports can be used to extract data from the system.

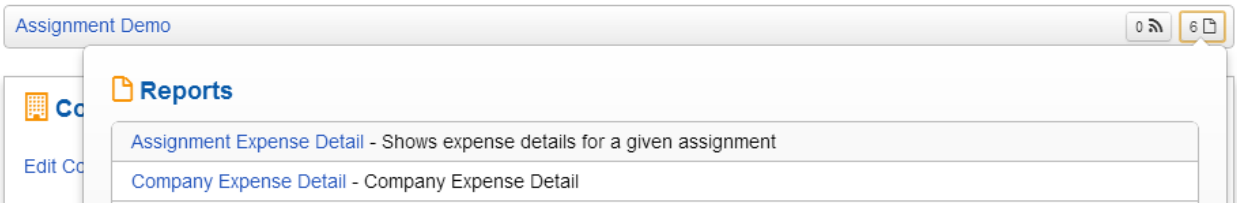
Production Reports

Many production reports exist in the system to support the generic business process needs within GROW/AssignmentPro. Production reports are generated in the RDL report viewer. A user can choose to create a Microsoft EXCEL or Adobe PDF document when running a production report.

Note: Microsoft EXCEL or Adobe PDF documents can be created from production reports.

Navigation: **Configuration** Tab
Documents/Reports menu group
Production Reports menu

Production reports can be displayed on any screen in the system via the Report bar.



Some production reports require parameters. Depending on the screen that the report is created from, parameters may be available to the production report. If a parameter is not found by the system, the user will be prompted for the parameter (or report filter) when the report is executed.

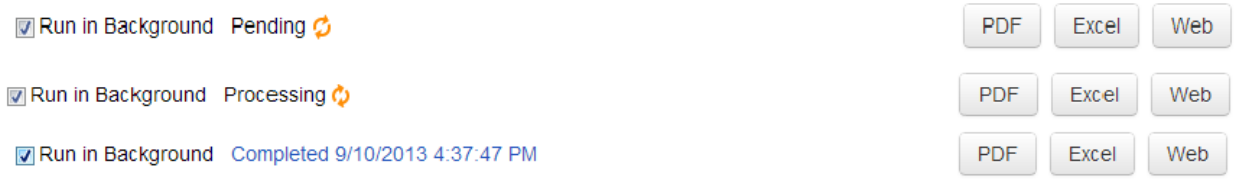
Run in Background

Production reports with large amounts of data can be run in the background while the user is working in other areas of the system. This allows the system to run the report more efficiently while the user no longer needs to wait for the report to finish.

The 'Run in Background' checkbox can be found on any production report parameters screen. Checking this box allows the report to be run in PDF or Excel formats only. A status of the report will appear near the checkbox and when the report is completed, a link to the completed report will display.

This completed link lets the user view the results of the report. The link displays the date/time the report was last run by the current user. Other users will not have access to this link and would need to run the report from their own login to view the results. This is important to note since not all users have the same security rights to all files and/or data so the results may be different depending on the user's security settings.

While the report is running, it displays one of four statuses. The first status is Pending. When this is displayed, the report is ready to run. Second is the Processing status which displays when the report is running. One of two statuses displays for the third step; Completed or Error. Completed displays when the report completes or Error will display if there was an error encountered while the report was running.



The results of the report will display for seven (7) days after the report has been run. After that, the system will clear the link.

Exports

AssignmentPro/GROW includes a mechanism of generating formatted data files that can be human-readable, or used for imports for other systems. The export system can be configured to export any data in the system, and to allow any number of arbitrary inputs. Encrypted data fields are automatically decrypted (provided the user running the report has decryption rights), and the output can optionally be processed with an XSL transform file.

Navigation: **Configuration** Tab
Imports/Exports menu group
Production Reports menu

For more information on Exports, please contact EQUUS Software.

User Reports

User reports can be created for any type of data in the system. They can be created at the system or company level and may be copied anywhere in the system.

System level reports are created on the Home tab, once on the System Published Reports screen click on the 'New User Report' button. A system level report may be filtered by company, but generically will run against all companies unless otherwise specified.

Navigation: **Home** Tab
General menu group
System Reports menu

Company level reports are created on the Companies Tab, once on the Company Published Reports screen click on the 'New User Report' button. Company level reports will automatically be filtered for the company it is created under. A user report type that will be used for company-level reports will require a path to the Company data source (table).

Navigation: **Companies** Tab
Select a Company
Reports menu

Report Security

A user's security rights will limit what is returned by a user report. For instance, if the user doesn't have rights to company ABC, then a report that should normally run against the entire system will not return data for the ABC company when that user runs the report.

Screen rights can be limited by role for the System & Company User Reports

Screen Name	View	Add	Edit	Delete	Execute	Lock	Unlock
System User Report Details	☑	☐	☐	☐	☑	☐	☐

screens. A possible configuration for a client user would grant their role only "View" and "Execute" rights. This will allow them to run reports and change parameters when prompted, but they will be unable to modify or delete the report

Data Encryption

If a data field is encrypted, then the user will see the word (encrypted)instead of the actual encrypted value.

Account Sums

The Account Sums summarize the expenses for any number of accounts, byassignment, into one column on the User Report.

Navigation: **Configuration** Tab
Accounts menu group
Account Sums menu

Note: Account Sums are directly related to the Assignment Table. When setting up a User Report Type, the Assignment Table must be included. Itcan be either the Base table or an Additional Data Source.

To create new account sums, click the + link on the account sums screen.

Accounts Section

To include an account in the Account Sum select the check box in front of the Account Description. All accounts can be selected for the account sum by clicking **Select All**, and deselected by clicking **Select None**.

Accounts | Expense Criteria

Accounts Sort Default Asc.

	Description	Category	Number
☑	Appliance Allowance		004
☑	Appliance Purchase - company owned		005
☑	Appliance Rental		006
☑	Appraisal		jlm_02
☑	Area Cost Allowance		007
☐	Assignment Expense		0001
☑	Assignment Management Fee		11111
☑	Bank Wire Fee Reimbursement		003
☑	Bank Wire Fees		001

Expense Criteria

Account sums can further be defined by adding expense criteria. The **Prompt** check box, when checked, will prompt for the selected criteria each time the User Report is generated. Expenses can be filtered by:

Accounts | Expense Criteria

Expense Criteria

Prompt		Default
☐	Paid To	<ALL>
☐	Payor	<ALL>
☐	From Tax Year	<ALL>
☐	To Tax Year	<ALL>
☐	Policy Standing	<ALL>
☐	Blank Payroll Date	<ALL>
☐	From Payroll Date	
☐	To Payroll Date	
☐	From Report Date	
☐	To Report Date	
☐	From Expense Date	
☐	To Expense Date	

Voucher Status

☑	Draft
☑	Approval In Progress
☑	Approved
☑	Locked
☑	Submitted
☑	Paid
☑	Denied

Save Delete Close

- **Paid To:** Expenses are paid to the employee or other. The drop-down list is <ALL>, Employee, or Other. <ALL> is the default selection and includes expenses paid to the employee and expenses paid to other. If Employee is selected, only expenses paid to the employee are included as part of the account sum total. If Other is selected, only expenses paid to Other are included as part of the account sum total. If you are including Manual TA or Manual WH it will be included when the Paid To is Other or <ALL>.

- **Payor:** Expenses are paid by Home Office, Host Office, We Will Pay, We Paid Client Will Pay, Client Paid, Billing Item, or Other. Custom Payor values are setup in the *System Lookup Maintenance* screen. <ALL> is the default selection and includes expenses paid by all different payor values. If you are including Manual TA or Manual WH it will be included only when the Payor is <ALL>

- **From Tax Year:** This field filters by the Tax Year selected in the Expense Entry Details. <ALL> is the default and will include expenses from all tax years.

- **To Tax Year:** This field filters by the Tax Year selected in the Expense Entry Details. <ALL> is the default and will include expenses to all tax years

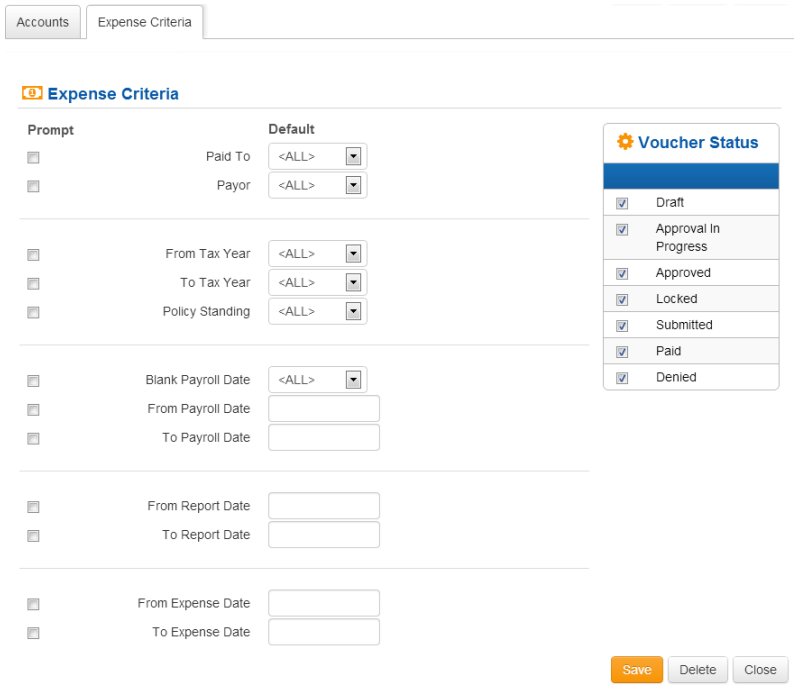
- **Policy Standing:** Expenses are either 'In Policy', 'Exception', or 'Denied'. The Policy Standing drop-down list includes In Policy, Exception, Denied, or Not Denied (include expenses which are 'In Policy'; and include expenses which are 'Exceptions'). <ALL> is the default and will include expenses with a policy standing of In Policy, Exception, and Denied. If you are including Manual TA or Manual WH it will be included when the Policy Standing is Not Denied, In Policy, or <ALL>.

- **Blank Payroll Date:** A drop-down list with three options <ALL>, Yes, No. <ALL> is the default option and includes expenses regardless of whether they have been reported to payroll or not. If the Yes option is selected, only expenses that have not been reported to payroll on a Tax Calc Payroll Report are included as part of the account sum total.

If the No option is selected, only expenses that have been reported to payroll on a Tax Calc Payroll Report are included as part of the account sum total.

- **From Payroll Date**: When populated, only expenses that have been reported to payroll on a Tax Calc Payroll Report with a Payroll Sent Date greater than or equal to the date entered will be included in the account sum total.
- **To Payroll Date**: When populated, only expenses that have been reported to payroll on a Tax Calc Payroll Report with a Payroll Sent Date less than or equal to the date entered will be included in the account sum total.
- **From Report Date:** When populated, only expenses with a Report Date that is greater than or equal to the date entered are included as part of the account sum total.
- **To Report Date:** When populated, only expenses with a Report Date that is up to and including the date entered are included as part of the account sum total.
- **From Expense Date** When populated, all expenses from the date entered are included as part of the account sum total. If you are including Manual TA or Manual WH the Report Date of the Adjustment will be used for the filter.
- **To Expense Date:** When populated, all expenses up to and including the date entered are included as part of the account sum total. If you are including Manual TA or Manual WH the Report Date of the Adjustment will be used for the filter.
- **Voucher Status:** The voucher statuses of Draft, Approval In Progress, Approved, Locked, Submitted, Paid, and Denied are checkbox items. By default all options are checked and all voucher status are included as part of the account sum total. Once an account sum is initially saved, the Voucher Status list is populated. If you would like to exclude expenses that are associated with any vouchers in any of these statuses, uncheck the checkbox next to the status you would

like to exclude. If you are including Manual TA or Manual WH it will beincluded when the Voucher Status(es) selected include Approved, Locked, Submitted, and/or paid.

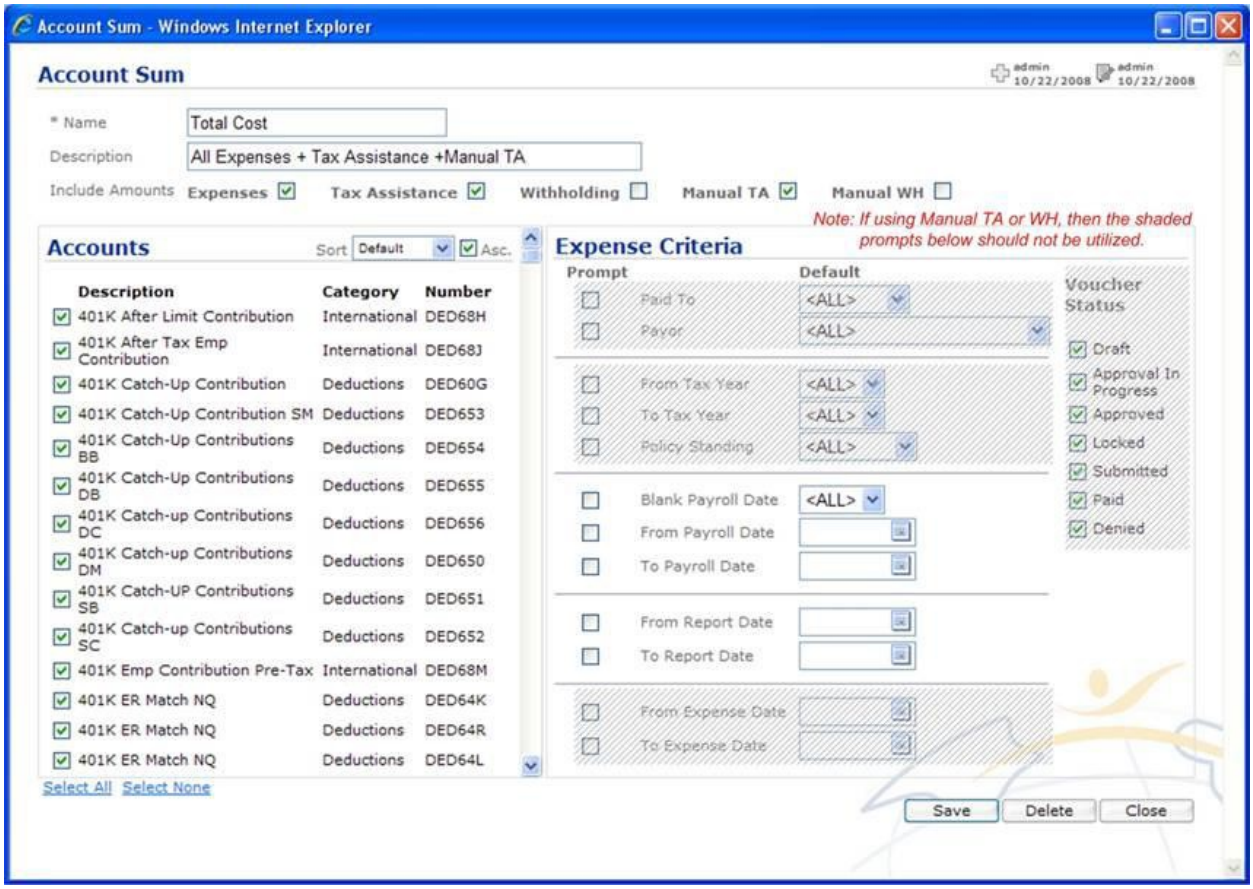


Each User Report definition includes the ability to add one or multiple account sums. Once selected, choose the appropriate account sum from a drop down list and determine what currency to use.

Accounts Sums can be configured to use Expenses, Tax Assistance, Withholding, Manual Tax Assistance, and Manual Withholding.

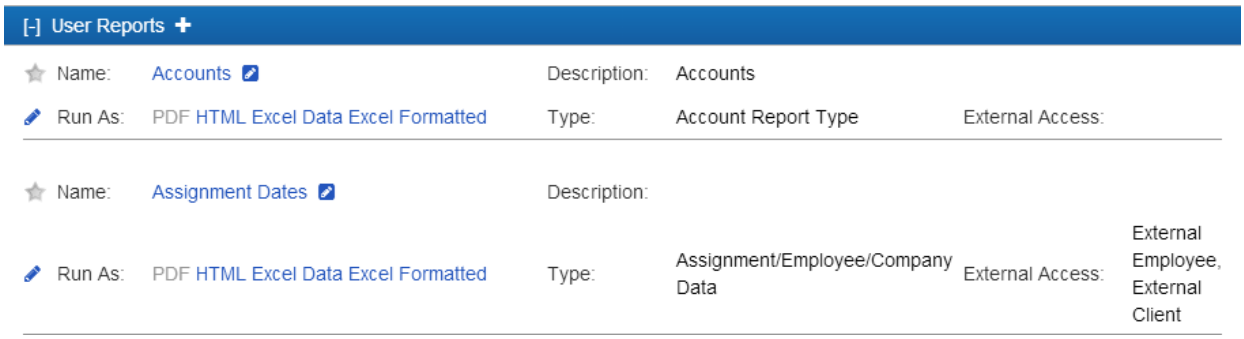
Manual TA and WH are added to the system at the assignment level and are not tied to expenses in the system. To see how each of the filters applies to Manual TA and WH amounts see the filter details above.

To create an account sum that would represent the total cost of a relocation, define the account sum as follows:

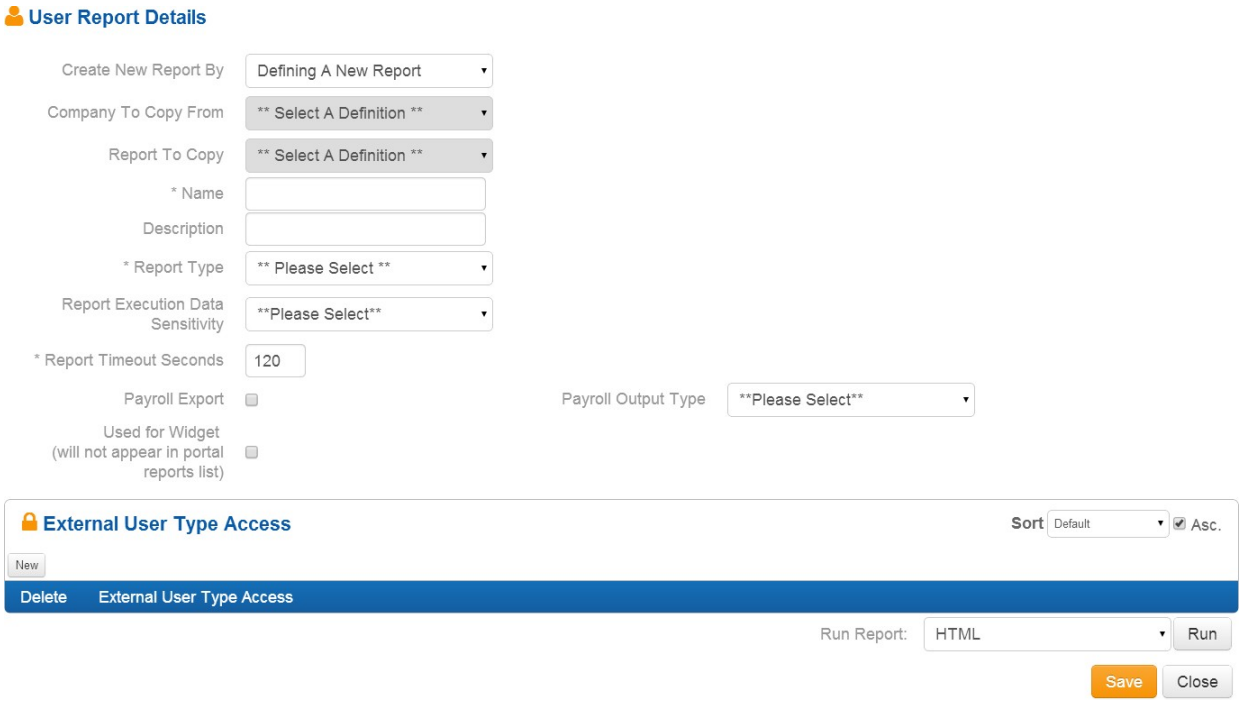


Adding User Reports

To add a new report, click the + link on one of the reports screens.



User Report Details page opens. It allows you to create a new report by defining from scratch, or to copy an existing user report and modifying. You must give the new report a Name and select the report type (what data will you need?). You can specify if it will be used for a payroll export or not and specify the output type.



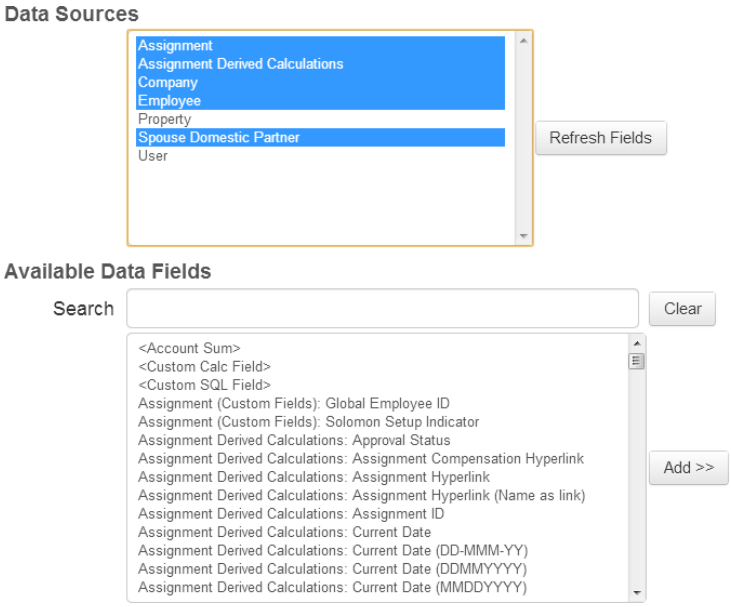
This page also includes a checkbox labeled "Used for Widget (Will not appear in portal reports list)". When this box is checked, the report will not show on the external portal Reports page, even if External User Type Access is added. This field

is related to widgets used on the portal dashboard. In order for a report to be used in a portal dashboard widget, the report must be given External User Type Access for the appropriate user type; however, you may not want the external user to access the report directly, therefore this checkbox should be checked. This checkbox does not appear on the system level User Reports page since system level User Reports do not show on the portal Reports page by default.

Once the report has been saved it can be added to the My Favorites report group. Click ☆ to favorite the report and ★ to remove it from favorites.

Adding Fields to a User Report

All fields associated with the user report type selected can be added to the report. The "Default" fields selected on the user report type screen will determine which fields are loaded by default in the Available Fields list.



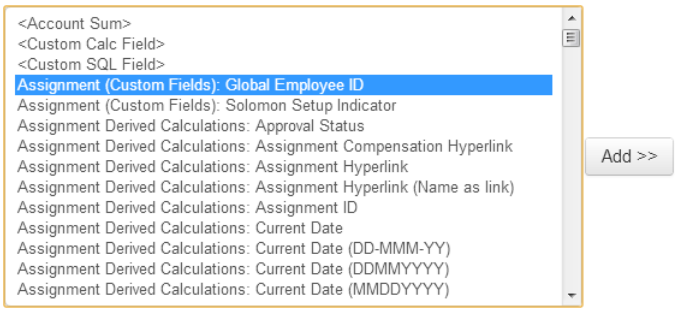
To add more fields to the "Available Fields" list, select more Data Sources from the list and click the "Refresh Fields" button.

To add fields to the user report select the field and click the "Add >>" button. Multiple fields can be selected and added to the user report by selecting the Control or Shift key on your keyboard.

The Search box allows you to filter down the fields to show only what matches your search criteria. You can use the Clear button to remove your filter.

Custom Fields

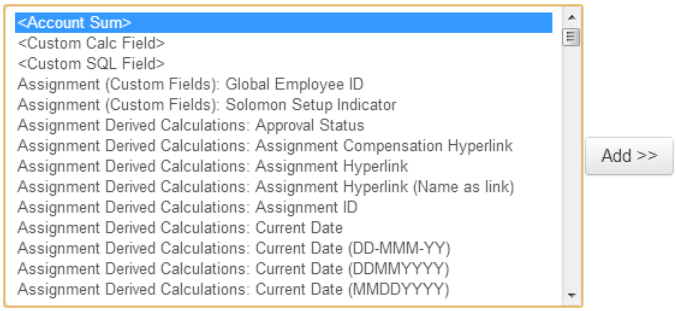
Custom Fields associated with the data sources (tables) identified in the user report type will be automatically available in the Available Fields list for some tables. To add custom fields to a report, simply select the appropriate field and click the "Add >>" button.



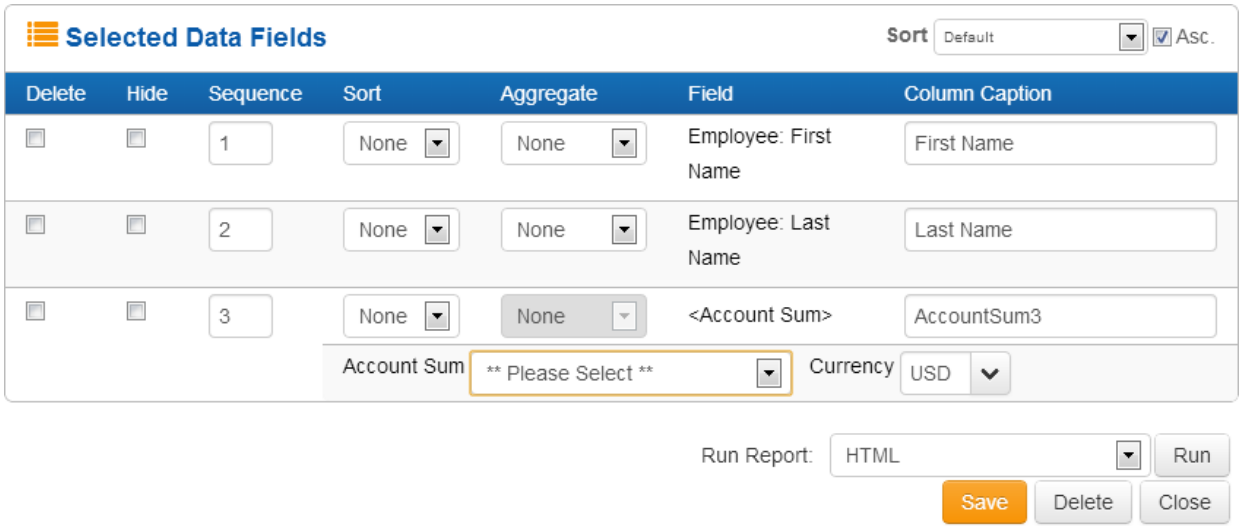
Additionally, custom field tables can be added as additional data sources onthe User Report Type screen.

Account Sums

User Reports Types which include the Assignment Data Source (table) willautomatically include <Account Sum> as an Available Data Field.



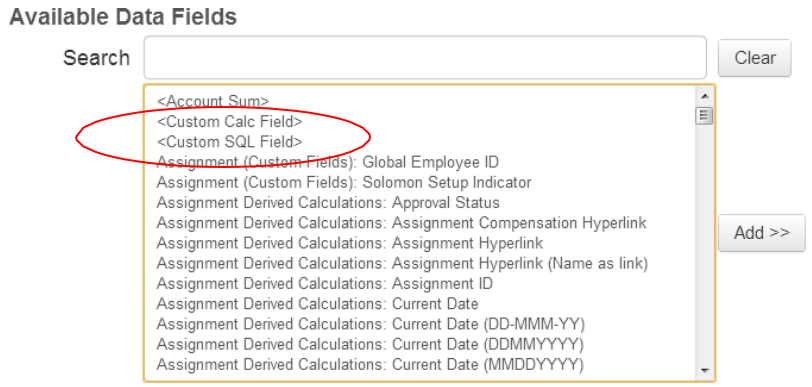
To add include an Account Sum in the report, select <Account Sum> and click the Add button.



Select the account sum from the drop-down list, and pick a currency. The amounts listed in the Account Sum field are in the currency selected. Multiple account sums can be added to one report.

Calculated Fields

There are two kinds of calculated fields available in the User Report writer: Custom Calc Fields and Custom SQL Fields. To add a calculated field to a user report choose **<Custom Calc Field>** or **<Custom SQL Field>** from the top of the Available Data Fields list and click the "**Add > >**" button, thenmodify the field name and formula:



Custom SQL Fields

Custom SQL Fields enable you to create a new field, which is the result of concatenating two or more existing fields, or is the result of a mathematical calculation on numeric fields. This field type allows the user to utilize SQL commands like CASE, DATEDIFF and GETDATE().

When referencing another field in a Custom SQL Field, copy or drag and dropthe Field value into the Formula field. This is different than the Custom Calc Field where the Column Caption is referenced in the Formula field.

It should also be noted that there are eleven Equus functions that are available for use in the Custom SQL Field.

- DBO.EQ_STD_SERVICE_ORDER_VENDOR_AND_STATUS_LIST_BY_TYPE() function will evaluate the status of a service order by vendor and type.
- DBO.EQ_STD_USER_NAME_GET(@SBUILDER_USER_ID) function will return the first and last name of the current user.
- The DBO.EQ_STD_DEPENDENT_BASIC_INFO() function requires the assignment id and a date. It will display dependent information for an assignment, including: first & last name, gender, date of birth, age,

primary citizenship, and status. You can use GetDate() as the date parameter if you'd like to use today's date. The date is used to calculate the dependent's age from the given date parameter and the dependent's birth date.

- DBO.EQ_STD_COUNTRY_CODE_FROM_NAME() function expects the country name as an input and will return the ISO 3166-1 3 Letter Code. If you simply want the code for the Assignment From/To Country, you can use the Assignment Derived Calculations data source, From/To Country Code (3 Char) fields.
- DBO.EQ_STD_STATE_PROVINCE_CODE_FROM_NAME() function expects the country name and state/province name as inputs and will return the Code as listed on the Configuration tab, Countries screen.
- DBO.EQ_STD_HOST_COUNTRY_ISO2_FROM_ASSIGNMENT_ID () function will accept the assignment id and return the 2 character ISO code for the From Country. This same information can also be added to your report using the Assignment Derived Calculations data source, To Country Code (2 Char) field
- DBO.EQ_STD_HOME_COUNTRY_ISO2_FROM_ASSIGNMENT_ID () function will accept the assignment id and return the 2 character ISO code for the From Country. This same information can also be added to your report using the Assignment Derived Calculations data source, From Country Code (2 Char) field
- DBO.EQ_STD_CLASSIFICATION_CLIENT_CODE_FROM_DESCRIPTION_UNIQUE_NAME () function will accept the display value of a classification lookup and the unique name of the field. It will return the Client Code as listed on the Lookup Maintenance page. This may be useful for systems integration.
- DBO.EQ_STD_CLASSIFICATION_CODE_FROM_DESCRIPTION_UNIQUE_NAME () function will accept the display value of a classification lookup and the unique name of the field. It will return the Code as listed on the Lookup Maintenance page. This may be useful for systems integration.
- DBO.EQ_STD_COMPANY_SEGMENT_CODE_FROM_NAME() function will accept the display value of the segment, the segment level, and the company id. It will return the Code as listed on the Segment Lookups detail screen. This may be useful for systems integration.
- DBO.EQ_STD_CUSTOM_FIELD_CODE_FROM_UNIQUE_NAME() function will accept the display value of the custom field, the unique name of the custom field, and the company id. It will return the Code as listed on the Custom Field detail screen, Lookup Values section. The company id is required if the custom field is defined at a company level. This may be useful for systems integration.

All eleven functions are used just as the other functions described above.Please see examples for these functions below.

Below is a list of some of the characters and functions that are supported:

***** multiply symbol in the formula.
/ divide symbol in the formula.
+plus symbol in the formula. Also used for addition or for concatenating two fields.
- subtraction symbol in the formula.
(open parenthesis symbol to the formula.
) close parenthesis symbol to the formula.

Quotes - single quotation marks around highlighted text. Any text added to the formula field by you must be enclosed by single quote marks.

CAST - Used when concatenating a text and a numeric field). CAST will convert a numeric value to a text value or a text value to a numeric value.

Concatenating a text field and a numeric field using the CAST function

Example: combining [Entry: Amount] & [Entry: Currency] fields to produce a new field that takes the format "[Entry: Amount] [Entry: Currency] fields*", such as "3000.00 USD".*

1. First add the Amount and Currency fields from the Available fields list to the report: [Entry: Amount] & [Entry: Currency]

2. Add a Custom SQL Field to the report. Modify its caption and sequence fields as appropriate.

3. The formula field should read: "CAST([Entry: Amount] AS NVARCHAR) + ' ' + [Entry: Currency]"

   Note: Please use NVARCHAR in your cast when your resulting field will be a string

4. If you do not want to see the new concatenated field AND the [Entry: Amount] & [Entry: Currency] fields on the report, check the Hide checkbox next to the [Entry: Amount] & [Entry: Currency] fields.

CASE - "IF THEN" style logic operation to your calculated field, in the format of:
CASE WHEN True_Or_False_expression THEN result_expression [...n] ELSE else_result_expression END

Each section of this statement is described in "Arguments" below:
Arguments:

WHEN True_Or_False_expression is an expression that returns either TRUE or FALSE when evaluated. Any valid SQL Server expression is allowed.

THEN result_expression is the expression that is returned when the WHEN True_Or_False expression evaluates to TRUE. Any valid SQL Server expression is allowed.

[...n] is a placeholder indicating that multiple "WHEN…THEN" clauses can be used. You will have to type these additional clauses yourself into the calculated field builder screen, since only one "WHEN…THEN" clause is provided when you click the CASE Statement button.

ELSE else_result_expression is the expression that is returned if none of the WHEN… THEN operations evaluate to TRUE. If this argument is omitted and no comparison operation evaluates to TRUE, CASE returns NULL. Any valid SQL Server expression is allowed.

Example:

```
CASE
WHEN taxable = 0 THEN 'None'
WHEN taxable < 10000 THEN 'Low'
ELSE 'High'
END
```

Hint: Don't forget the END

COALESCE can be used when the need is to compare a number of data fields and the desired result is to return the first field that is not NULL.

For example, the desired returned value for the calculated field is Assignment End Date, if that is blank then Assignment Extension Date, is that is blank then Assignment Scheduled End Date. To return the desired result the Calculated Field would be written using the COALESCE function as follows:

```
COALESCE([ASSIGNMENT!ACTUAL_END_DATE],
[ASSIGNMENT!CURRENT_EXTENSION_END_DATE],
[ASSIGNMENT!SCHEDULED_END_DATE])
```

DATEDIFF Statement A function that returns the difference between two date fields, in days. The format of the statement is:

DATEDIFF (day, startdate, enddate)
Each section of this statement is described in "Arguments" below:
Arguments:

day is a constant value indicating that the function should return the result of the calculation in days.

startdate is the beginning date for the calculation. startdate is an expression or field that returns a date value, or a character string in a date format.

enddate is the ending date for the calculation. enddate is an expression or field that returns a date value, or a character string in a date format.

Note: Use the function "GetDate()" to get today's date for use in a formula

To Utilize a 'Date Difference' To Display String Values:

From the information provided in 'Date Difference' (please see above), the following calculation enables the report to display VarValues while analyzing date differences.

Ex. 'Actual Close Date Past 30 Days' SQL Calculation:

CASE WHEN DATEDIFF(day,[Property Closing Detail: Actual Close Date], GETDATE()) < 30 THEN 'No' WHEN DATEDIFF(day,[Property Closing Detail: Actual Close Date], GETDATE()) > 30 THEN 'Yes' END

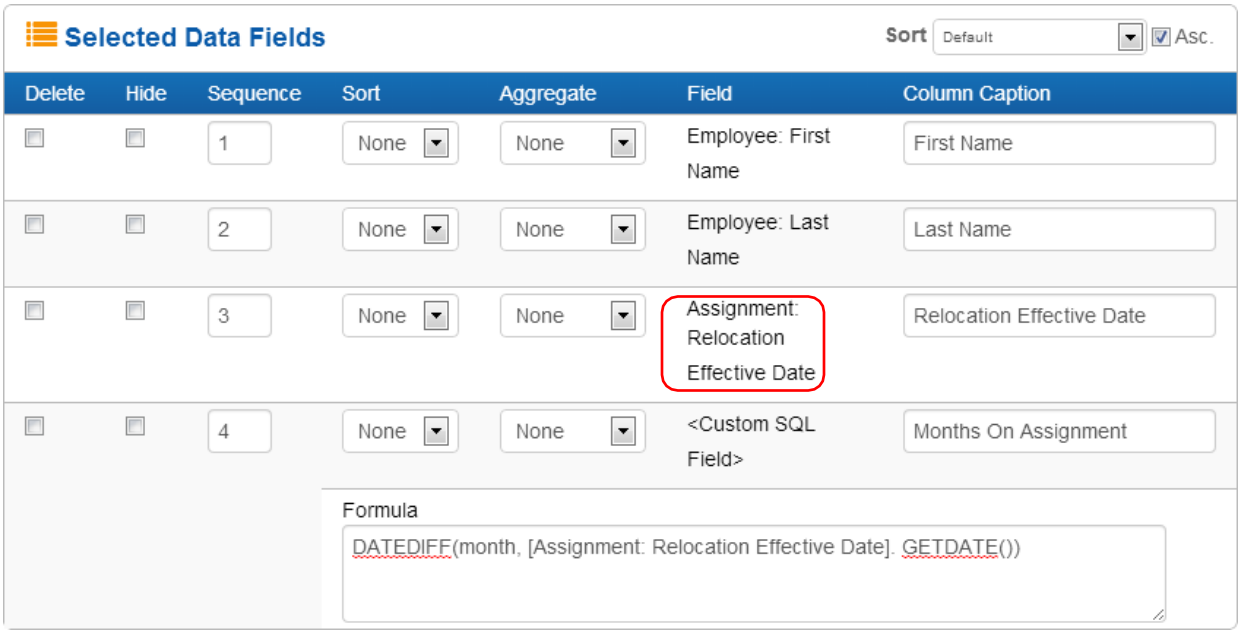
Example: Create a report that includes an total months on assignment

1. First add the [Assignment: Relocation Effective Date] field to the report from the Available Fields List.

2. Next add a <Custom SQL Field> to the report from the Available Fields List. Modify its caption and sequence fields as appropriate.

3. The formula field should read: "DATEDIFF(month,[Assignment: Relocation Effective Date], GETDATE())"

   Note: The Effective Date field does NOT need to be on the report, but the name needs to be referenced exactly in the Custom SQL Field. The value can be copied directly from the Field column. See the selected Field below.



Note: When referencing another Field in a Custom SQL Field, copy or drag & drop the <u>Field</u> value into the Formula field. This is different than the Custom Calc Field where the <u>Column Caption</u> is referenced in the Formula field.

Custom SQL Fields cannot be referenced in other Custom SQL Fields.

Other Examples

The above examples use CAST(), CONVERT() and DATEDIFF(). OtherCustom SQL Field functions include:

GETDATE()

Ex. GETDATE() *(where the current date is 10/16/2011)*

Result: 10/16/2011

CONVERT() – (data_type, expression, style)

Ex. To remove the time portion of a date:
CONVERT (varchar(12), [ASSIGNMENT: Start Date], 101)
(where Start Date is 2/28/2001 11:04:08 AM)

Result: 02/28/2011

Ex. To remove the time portion of a date:
CONVERT (varchar(12), [ASSIGNMENT: Start Date], 103)
(where Start Date is 2/28/2001 11:04:08 AM)

Result: 28/02/2011

NOTE: for a list of styles for date formats, see
http://sqlserverplanet.com/oracleequivalents/trunc-date-sql-server/

ROUND() – (numeric_expression, length [function])

Ex. Round (123.4545, 2);

Result: 123.4500

Ex. Round (123.4545, -2);

Result: 100.00

DATENAME() - (datepart, date)

Ex. DATENAME(month, [Assignment: Relocation Effective Date])

(where Relocation Effective Date is 10/28/2001)

Result: OctoberDATEPART() - (datepart, date)

Ex. DATEPART(month, [Assignment: Relocation Effective Date])
(where Relocation Effective Date is 10/28/2001)

Result: 10

DAY() – (date)
MONTH()– (date)
YEAR()– (date)

Ex. YEAR(GETDATE())
(where the current date is August 18, 2013)

Result: 2013

DATEADD() - (datepart , number, date)

Ex. DATEADD(month, 3, GETDATE()) *(where the current date is10/16/2012)*

Result: 1/16/2013

ABS() – (numeric)

Ex. ABS(-10000)

Result: 10000

LEFT() - (character_expression , integer_expression) RIGHT()- (character_expression , integer_expression)

Ex. LEFT([Employee: Last Name],5) *(where Last Name = 'Reynolds')*

Result: ReynoLEN() – (cExpression)

Ex. LEN(‘EQUUS’)

Result: 5

SUBSTRING() - (value_expression ,start_expression , length_expression)

Ex. SUBSTRING(‘EQUUS’, 1,1)

Result: E

REPLACE() - (string_expression , string_pattern , string_replacement)

Ex. REPLACE('abcdefghicde','cde','xxx')

Result: abxxxfghixxx

UPPER() - (character_expression)LOWER()- (character_expression)

Ex. LOWER(‘EQUUS’)

Result: equus

Ex. UPPER(LEFT('EQUUS',1)) + LOWER(RIGHT('EQUUS',LEN('EQUUS')-1))

Result: Equus

ROW_NUMBER()

Ex. ROW_NUMBER() OVER (ORDER BY [Assignment: RelocationEffective Date])

Result: each row has a numerical value starting withone.

DBO.EQ_STD_SERVICE_ORDER_VENDOR_AND_STATUS_LIST_BY_TYP
E() – (assignment_id, service_order_type_classification_code, service_name_50_character_string)

Ex. DBO.EQ_STD_SERVICE_ORDER_VENDOR_AND_STATUS_LIST_BY_TYPE
([ASSIGNMENT: ID], 'EQVSDB', 'Home Buying')
Effective Date])

Result: If the service is not authorized (regardless if there is a service order or not): "Service not authorized."
If the service is authorized, but there is no serviceorder: "Service not ordered."
If the service is authorized and there is a service order: "Fragomen Global Immigration - Ordered".
If the service is authorized and there are multiple serviceorders: "Equity Corporate Housing – Service Complete; Oakwood Corporate Housing - Ordered"

DBO.[EQ_STD_USER_NAME_GET](current_user_id)
Ex. DBO.[EQ_STD_USER_NAME_GET](@SBUILDER_USER_ID)
(where the current user is Matthew Long)

Result: Returns the first and last name of the currentuser in the system – Matthew Long

DBO.EQ_STD_DEPENDENT_BASIC_INFO(assignment_id, date)
Ex.
DBO.EQ_STD_DEPENDENT_BASIC_INFO([Assignment: ID],GETDATE())
(where there are 2 dependents: Joshua Mendez born April 8 2011 on assignment and Elizabeth Mendez born November 27, 2008 not on assignment, and the current date is March 38, 2013)

Result: Returns for every dependent on an assignmentfirst name, last name, "Date of Birth:" birth date, "Age:"age.
Joshua Mendez, Date of Birth: Apr 8 2011, Age: 1, Status: On Assignment; Elizabeth Mendez, Date of Birth:Nov 27 2008, Age: 4, Status: Not On Assignment

DBO.EQ_STD_COUNTRY_CODE_FROM_NAME(country_name)
Ex.

DBO.EQ_STD_COUNTRY_CODE_FROM_NAME([Employee:
Country of Birth])
(where the Country of Birth is Germany)

Result: Returns the 3 character ISO code for thecountry. DEU

DBO.EQ_STD_HOST_COUNTRY_ISO2_FROM_ASSIGNMENT_ID(assignment_id)
Ex. DBO.EQ_STD_HOST_COUNTRY_ISO2_FROM_ASSIGNMENT_ID([Assignment: ID])
(where the From Country is Germany)

Result: Returns the 2 character ISO code for thecountry. DE
DBO.EQ_STD_HOME_COUNTRY_ISO2_FROM_ASSIGNMENT_ID(assignment_id)
Ex. DBO.EQ_STD_HOME_COUNTRY_ISO2_FROM_ASSIGNMENT_ID([Assignment: ID])
(where the To Country is South Africa)

Result: Returns the 2 character ISO code for thecountry. ZA

DBO.EQ_STD_STATE_PROVINCE_CODE_FROM_NAME(countryname, state/province name)
Ex. DBO. EQ_STD_STATE_PROVINCE_CODE_FROM_NAME
([Temp Living Detail: Country], [Temp Living Detail:State/Province])
(Where the Country is Canada and the Province is Ontario)

Result: Returns the ISO code for the State/Province.CA-ON

DBO.EQ_STD_CLASSIFICATION_CLIENT_CODE_FROM_DESCRIPTION_UNIQUE_NAME
(classification lookup display value, fieldunique name)
Ex. DBO. EQ_STD_ CLASSIFICATION_CLIENT_CODE_FROM_DESCRIPTION_UN
IQUE_NAME ([Employee: Gender], 'EMPLOYEE!GENDER')
(where [Employee: Gender] for the employee is Male and the client code for Male = M)

Result: Returns the Client Code for Gender, as shown onthe Lookup Maintenance screen.
M

DBO.EQ_STD_CLASSIFICATION_CODE_FROM_DESCRIPTION_UNIQUE_NAME
(classification lookup display value, field uniquename)
Ex. DBO. EQ_STD_ CLASSIFICATION_CLIENT_CODE_FROM_DESCRIPTION_UNIQUE_NAME ([Employee: Gender], 'EMPLOYEE!GENDER')
(where [Employee: Gender] for the employee is Male and the code for Male = EQGNML)

Result: Returns the Code for Gender, as shown on theLookup Maintenance screen.
EQGNML

DBO.EQ_STD_COMAPNY_SEGMENT_CODE_FROM_NAME
(segment lookup display value, segment level, company id)
Ex. DBO. EQ_STD_COMPANY_SEGMENT_CODE_FROM__NAME ([Assignment: From Segment Level 1 Lookup], 1, 1) *(where [Assignment: From Segment Level 1 Lookup] for the assignment being reported on is Americas with code AM; and the company id = 1)*

Result: Returns the Code for Segment 1, Company 1,Americas, as shown on the Company Segment Lookupsscreen.
AM

DBO.EQ_STD_CUSTOM_FIELD_CODE_FROM_UNIQUE_NAME()
(segment lookup display value, segment level, company id)
Ex. DBO.EQ_STD_CUSTOM_FIELD_CODE_FROM_UNIQUE_NAME
([Assignment (Custom Field): Large List],
'ASSIGNMENT_CF!CF_TEXT032', 1)
(where Assignment Custom Field Text032 has a Caption of Large List. The assignment being reported on has "Headquarters" as the value for the Large List field and Headquarters is defined with code HQ for company id = 1)

Result: Returns the Code for Custom Field AssignmentText032, Company 1as shown on the Company CustomField definition screen, Lookup Values section.
HQ

*__NOTE:__ If the Custom Field is defined at the system level,you may omit the company id parameter. If a company idis passed, the system will ignore it.

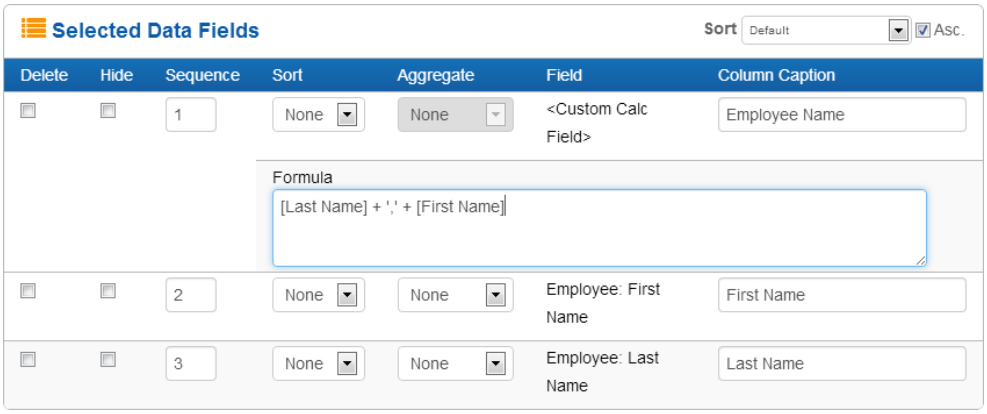
Custom SQL Fields do not support SELECT, UPDATE, DELETE, DROP,EXEC or many other basic SQL commands.

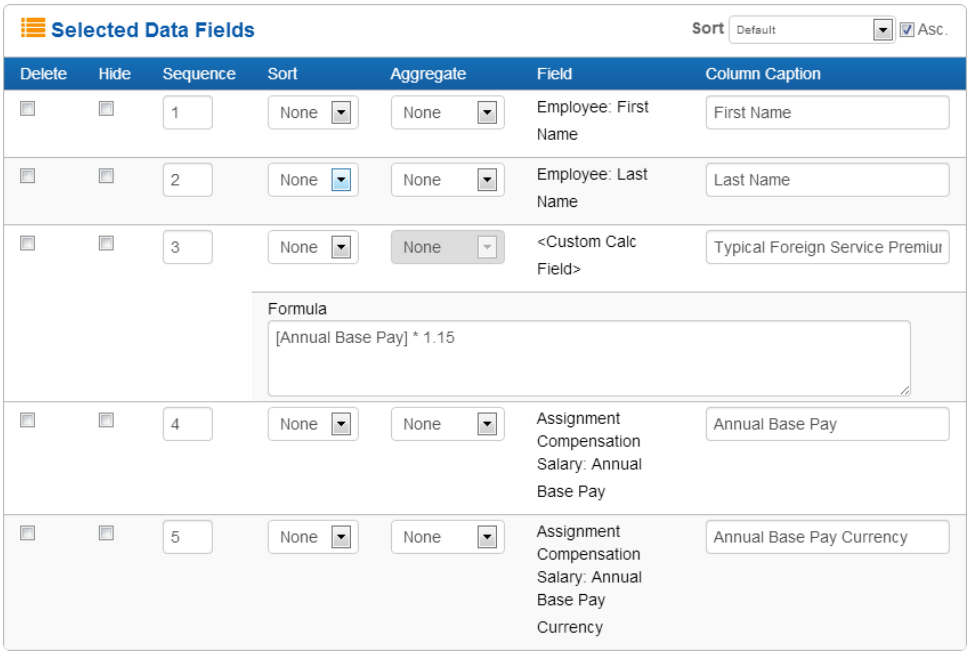
Custom Calc Fields

Simple calculated fields like concatenation or a simple calculation can bedone using the calculated fields.

To add a calculated field to a user report, select "<Calculated Field>" fromthe available field list and click 'Add'. Then modify the field name and formula.

Examples:





Note: To reference another field in a calculated field, copy the Column Caption of the field that you want to use into the Formula and place squarebrackets ("[" and "]") around the caption. This is different than the CustomSQL Field where the Field value is referenced in the Formula field.

Data Fields

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Edit Data Fields

Selected Data Fields

Sort Default Asc.

Hide	Sequence	Sort	Aggregate	Field	Column Caption
No	1			Employee: Company	Company
No	2			Employee: First Name	First Name
No	3			Employee: ID	ID
No	4			Employee: Last Name	Last Name
No	5			<Custom Calc Field>	Edit Assignment Info
		Formula:	'View/Edit'		
No	6			Assignment: Relocation Effective Date	Relocation Effective Date
No	7			<Custom Calc Field>	CW Template Exists?
		Formula:	iif([CWTemplateID] is NULL, 'Add New', 'View/Edit')		
No	8			Assignment: Relocation System Number	Relocation System Number
No	9			ASSIGNMENT COMP & PAYROLL INFO: Asgn Primary Payroll System	Asgn Primary Payroll System
No	10			ASSIGNMENT COMP & PAYROLL INFO: Asgn Secondary Payroll System	Asgn Secondary Payroll System
No	11			ASSIGNMENT COMP & PAYROLL INFO: Current Annual Base Pay Amount	Current Annual Base Pay Amount
No	12			ASSIGNMENT COMP & PAYROLL INFO: Current Annual Base Pay Currency	Current Annual Base Pay Currency
No	13			ASSIGNMENT COMP & PAYROLL INFO: Current Home Family Size	Current Home Family Size
No	14			ASSIGNMENT COMP & PAYROLL INFO: Current Host Family Size	Current Host Family Size
No	15			Assignment: ID	ID
No	16			<Custom Calc Field>	Salary Information
		Formula:	iif([Base Pay Amount]>0, [Base Pay Amount], 'Add New') + ' ' + iif([Base Pay Currency] is not null,[Base Pay Currency], '?')		
No	17			Comp Worksheet Assignment Template: ID	ID
No	18			<Custom Calc Field>	Home/Host family Size
		Formula:	iif([Home Family Size] is not null, [Home Family Size], '?') + '/' +iif([Host Family Size] is not null, [Host Family Size], '?')		

When creating Calculated Fields that reference other fields on the report, usethe caption values from the user report. For example, if the name for one

column/caption is "UnitPrice", and another "Quantity", the expression wouldbe:

[UnitPrice] * [Quantity]

When creating an Evaluation Clause for a filter, enclose strings with single quotes:

[LastName] = 'Jones'

Decimals and scientific notation are permissible for numeric values. Forexample:

[Birthdate] < #1/31/82#

OPERATORS

Concatenation is allowed using Boolean AND, OR, and NOT operators. Youcan use parentheses to group clauses and force precedence. The AND operator has precedence over other operators. For example:
(LastName = 'Smith' OR LastName = 'Jones') AND FirstName = 'John' When creating comparison expressions, the following operators are allowed:

<
>
<=
>=
<>
=
IN
LIKE

The following arithmetic operators are also supported in the Evaluation Clause:

+ (addition)
- (subtraction)
* (multiplication)
/ (division)
% (modulus)

STRING OPERATORS

To concatenate a string, use the + character. Whether string comparisons are case-sensitive or not is determined by the value of the DataSet class's CaseSensitive property. However, you can override that value with the DataTable class's CaseSensitive property.

FUNCTIONS
The following functions are also supported:

CONVERT

Description	Converts given expression to a specified .NET Framework Type (see end of document for comparison of SQL Server data types to .NET Framework data types).
Syntax	Convert(*expression*, *type*)
Arguments	*expression*-- The expression to convert. *type*-- The .NET Framework type to which the value will be converted.

Example: myDataColumn.Expression="Convert(total, 'System.Int32')". Use the syntax 'System.datatypename' in front of the name of the data type youare converting to. The data type must be enclosed in tics.

All conversions are valid with the following exceptions: Boolean can be coerced to and from Byte, SByte, Int16, Int32, Int64, UInt16, UInt32, UInt64, String and itself only. Char can be coerced to and from Int32, UInt32, String, and itself only. DateTime can be coerced to and from Stringand itself only. TimeSpan can be coerced to and from String and itself only.See the end of this document for a list of SQL Server data types and their corresponding .NET Framework data types.

LEN

Description	Gets the length of a string
Syntax	LEN(*expression*)
Arguments	*expression*-- The string to be evaluated.

Example: myDataColumn.Expression="Len(ItemName)"

ISNULL

Description	Checks an expression and either returns the checked expression or a replacement value.
Syntax	ISNULL(*expression*, *replacementvalue*)
Arguments	*expression*-- The expression to check. *replacementvalue*-- If expression is a null reference (Nothing), *replacementvalue* is returned.

Example: myDataColumn.Expression="IsNull(price, -1)"

IIF

Description	Gets one of two values depending on the result of a logical expression.
Syntax	IIF(*expr*, *truepart*, *falsepart*)
Arguments	*expr*-- The expression to evaluate. *truepart*-- The value to return if the expression is true. *falsepart*-- The value to return if the expression is false.

Example: myDataColumn.Expression = "IIF(total>1000, 'expensive', 'dear')

TRIM

Description	Removes all leading and trailing blank characters like\r,\n,\t, ' '
Syntax	TRIM(*expression*)
Arguments	*expression*-- The expression to trim.

SUBSTRING

Description	Gets a sub-string of a specified length, starting at a specified point in the string.
Syntax	SUBSTRING(*expression, start, length*)
Arguments	*expression*-- The source string for the substring. *start*-- Integer that specifies where the substring begins. *length*-- Integer that specifies the length of the substring.

Example: myDataColumn.Expression = "SUBSTRING(phone, 7, 8)"

Comparison of SQL Server and .NET Framework data types

SQL Server Data Type	.NET Framework type
Bigint	Int64

Binary	Byte[]
Bit	Boolean
Char	String Char[]
Datetime	DateTime
Decimal	Decimal
Float	Double
Image	Byte[]
Int	Int32
Money	Decimal
Nchar	String Char[]
Ntext	String Char[]
Numeric	Decimal
nvarchar	String Char[]
real	Single
smalldatetime	DateTime
smallint	Int16
smallmoney	Decimal
sql_variant	Object *
text	String Char[]
timestamp	Byte[]
tinyint	Byte
uniqueidentifier	Guid
varbinary	Byte[]
varchar	String Char[]

Sort

The sort order of the data on a user report can be set in the “Sort” column inthe Selected Data Fields grid. A sort order can be specified for multiple fields, but the fields must be sequenced the same as the order by rules are defined.

Ex. If you wish to sort by Last Name then by First Name, then the Last Name field must be before the First Name field in sequence. Alternatively, ifthe First Name field is prior to the Last Name field, then the report will be sorted by First Name, then by Last Name.

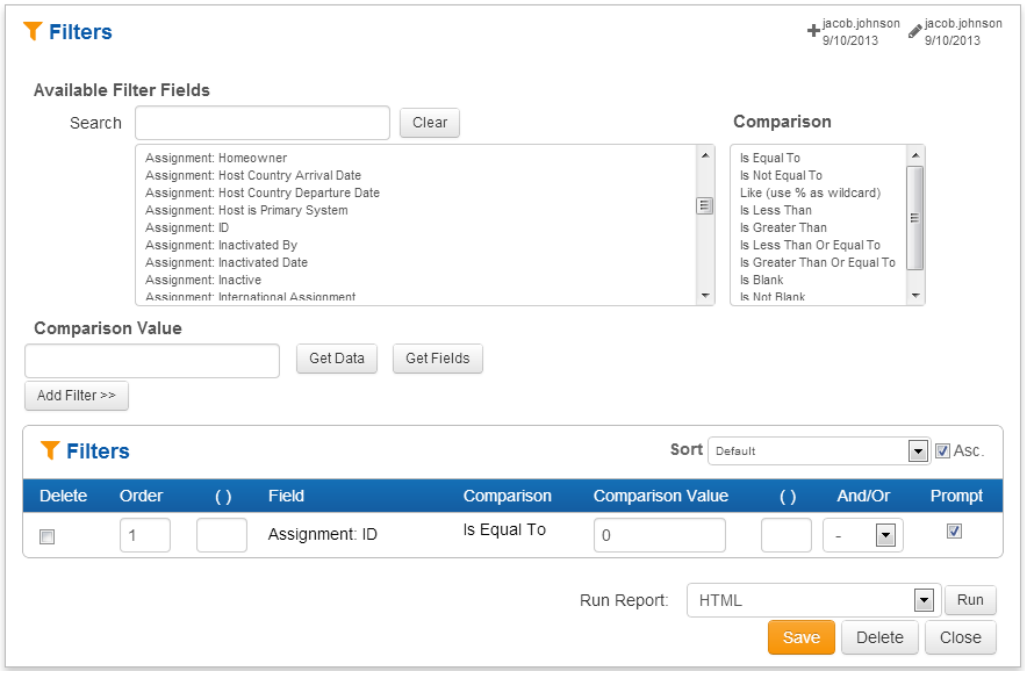
Aggregation

Simple aggregation can be performed to give a COUNT of the values returned in a report or a SUM of values returned in a report. Other aggregation values (MIN, MAX, AVG, CNTDIST STD DEV, VAR) are alsoavailable.

An example of the COUNT aggregation can be seen in Example #1.

Filters

Filters can be added to user reports using any available data field associatedwith the reports user report type. To add a report filter, select a field from the list and a comparison value to execute the filter. Then either enter a comparison value or click the "Get Data" button to load a list of possible values. When the appropriate value is in the Comparison Value field, click the "Add Filter >>" button. The Search box allows you to filter down the fields to show only what matches your search criteria. You can use the Clearbutton to remove your filter.



If multiple filters are applied to the report, the user must specify if all of the filters should apply (AND) or only one of the filters need to be true (OR). The parentheses fields are available for more complex filters.

The comparison value for a filter can be modified when the report isexecuted, if the "Prompt" field is checked for the filter.

If "Prompt" is selected, and the report is "Run", the following pop-up will appear prior to completing the report;

If the filters have a comparison of 'Is Equal To' or 'Not Equal To', and the comparison value is a look-up field, a type-ahead drop down menu will be

available. If you begin to type into the field, the system will retrieve matching items and display them for selection in the drop down list below it.

In some cases, the type-ahead feature will not be present. This happenswhen;

- There are too many rows returned
- There was a timeout

Both of these options can be changed to match the report's needs by goingto the "System Preferences" location of the application. 2000 rows is the maximum number of rows that can be displayed even if the setting is set to larger amount. An image of where to make these changes is below;

Filters will filter data from the report pre-aggregation. Here's an example:Here

are your report results pre-filter:

Policy	**Count**	**Average Amount**
Long-term	75	70,000 USD
Short-term	25	40,000 USD
Executive	15	80,000 USD

If your report included 5 short-term people with 0 USD for their amount then adding a filter of Amount <> 0 would change the report results:

Policy	**Count**	**Average Amount**
Long-term	75	70,000 USD
Short-term	20	50,000 USD
Executive	15	80,000 USD

Advanced Filters

If the Aggregate field is being used on the report, then the advanced filterswill be available. Using the same example as above, if we wanted to filter the report results you would need to reference the Policy, Count or Average Amount fields. You could NOT reference a field used in one of the calculations (Ex. AssignmentID or Amount).

You could add an advanced filter for an average amount > 50000 USD. That would give the following report result:

Policy	**Count**	**Average Amount**
Long-term	75	70,000 USD
Executive	15	80,000 USD

This is an example of a report that uses both the standard and advanced filters. The example report shows all primary cost estimates and includes atotal by category and employee.

Selected Data Fields Sort Default Asc.

Hide	Sequence	Sort	Aggregate	Field	Column Caption
No	1	Asc		Assignment: Relocation System Number	Relocation System Number
No	2			<Custom Calc Field>	Category
		Formula: IIF([Line Item Section] = 'Base Compensation' OR [Line Item Section] = 'Allowance', [Line Item Section], [Line Item Section] = '-' + [Line Item Sub Section])			
No	3			Cost Estimate Line Item View: Line Item Section	Line Item Section
No	4			Cost Estimate Line Item View: Line Item Sub Section	Line Item Sub Section
No	5			Cost Estimate Line Item View: Primary Estimate	Primary Estimate
No	6		Sum	Cost Estimate Line Item View: System Amount Year1	System Amount Year1
No	7		Sum	Cost Estimate Line Item View: System Amount Year2	System Amount Year2
No	8		Sum	Cost Estimate Line Item View: System Amount Year3	System Amount Year3
No	9		Sum	Cost Estimate Line Item View: System Amount Year4	System Amount Year4
No	10		Sum	Cost Estimate Line Item View: System Amount Year5	System Amount Year5
No	11		Sum	Cost Estimate Line Item View: System Amount Year6	System Amount Year6
No	12			Cost Estimate View: Data Entry Currency	Data Entry Currency
No	13		Sum	Cost Estimate Line Item View: Amount Total	Amount Total
No	14	Asc		<Custom SQL Field>	CategorySortOrder
		Formula: CASE WHEN [Cost Estimate Line Item View: Line Item Section] = 'Base Compensation' THEN 1 WHEN [Cost Estimate Line Item View: Line Item section] = 'Allowances' THEN 2 WHEN [Cost Estimate Line Item View: Line Item Section] = 'Relocation' THEN 3 WHEN [Cost Estimate Line Item View: Line Item Section] = 'Tax Costs' THEN 4 END			

Filters jacob.johnson 9/25/2013 jacob.johnson 9/25/2013

Edit Filters

Filters Sort Default Asc.

Order	( )	Field	Comparison	Comparison Value	( )	And/Or	Prompt
1		Cost Estimate Line Item View: Primary Estimate	Is Equal To	Yes			No

Advanced Filters jacob.johnson 9/25/2013 jacob.johnson 9/25/2013

Edit Filters

Advanced Filters Sort Default Asc.

Order	( )	Field	Comparison	Comparison Value	( )	And/Or
1		Cost Estimate Line Item View: Amount Total	Is Not Equal To	.00		

Here are the results of the user report that we defined above:

Cost Estimate Summary

Employee Number	Category	Year1	Year 2	Year 3	Year 4	Year 5	Year 6	Total	Currency
2186	Base Compensation	250,000.00	0.00	0.00	0.00	0.00	0.00	250,000.00	USD
2186	Allowances	42,000.00	0.00	0.00	0.00	0.00	0.00	42,000.00	USD
2186	Relocation - Initial Expat Costs	10,000.00	0.00	0.00	0.00	0.00	0.00	10,000.00	USD
2186	Tax Costs - Actual Tax	238,182.99	0.00	0.00	0.00	0.00	0.00	238,182.99	USD
2186	Tax Costs - Hypothetical Tax	(74,531.60)	0.00	0.00	0.00	0.00	0.00	(74,531.60)	USD
	Sub Totals:	465,651.39	0.00	0.00	0.00	0.00	0.00	465,651.39	USD
2190	Base Compensation	240,000.00	252,000.00	264,600.00	0.00	0.00	0.00	756,600.00	GBP
2190	Allowances	180,788.18	180,788.18	180,788.18	0.00	0.00	0.00	542,364.54	GBP
2190	Tax Costs - Actual Tax	385,566.01	393,760.75	402,364.47	0.00	0.00	0.00	1,181,691.23	GBP
2190	Tax Costs - Hypothetical Tax	(80,969.45)	(85,898.61)	(91,074.80)	0.00	0.00	0.00	(257,942.86)	GBP
	Sub Totals:	725,384.74	740,650.32	756,677.85	0.00	0.00	0.00	2,222,712.91	GBP
2193	Base Compensation	150,000.00	0.00	0.00	0.00	0.00	0.00	150,000.00	USD
2193	Allowances	10,000.00	0.00	0.00	0.00	0.00	0.00	10,000.00	USD
2193	Tax Costs - Actual Tax	54,040.05	0.00	0.00	0.00	0.00	0.00	54,040.05	USD
2193	Tax Costs - Hypothetical Tax	(40,782.89)	0.00	0.00	0.00	0.00	0.00	(40,782.89)	USD
	Sub Totals:	173,257.16	0.00	0.00	0.00	0.00	0.00	173,257.16	USD

Report Formatting

Data Formatting

The Formatting Options screen allows users to customize how the resulting will be formatted. These options do not affect Excel Data formatted reports,all formatting is purposefully stripped.
Suppresses Formatting for Merge Data Sources: Suppresses the format from applying to documents resulting from a merge with the user report (ie Merge Documents, Email Templates, Billing Invoices, etc)
Amount columns have default format of #,##0.00. Other options include Unspecified, Whole Amount, Compact Amount, Expanded Amount, Generic Amount, and Custom Format.
With the exception of Custom Format, all format types are sensitive to the current user's culture. For example, a Short Date in the US is formatted M/d/yyyy (eg 6/15/2009), but a Short Date in France is formatted dd/mm/yyyy (eg 15/06/2009). For simplicity, the example formats listed below assume a US culture.

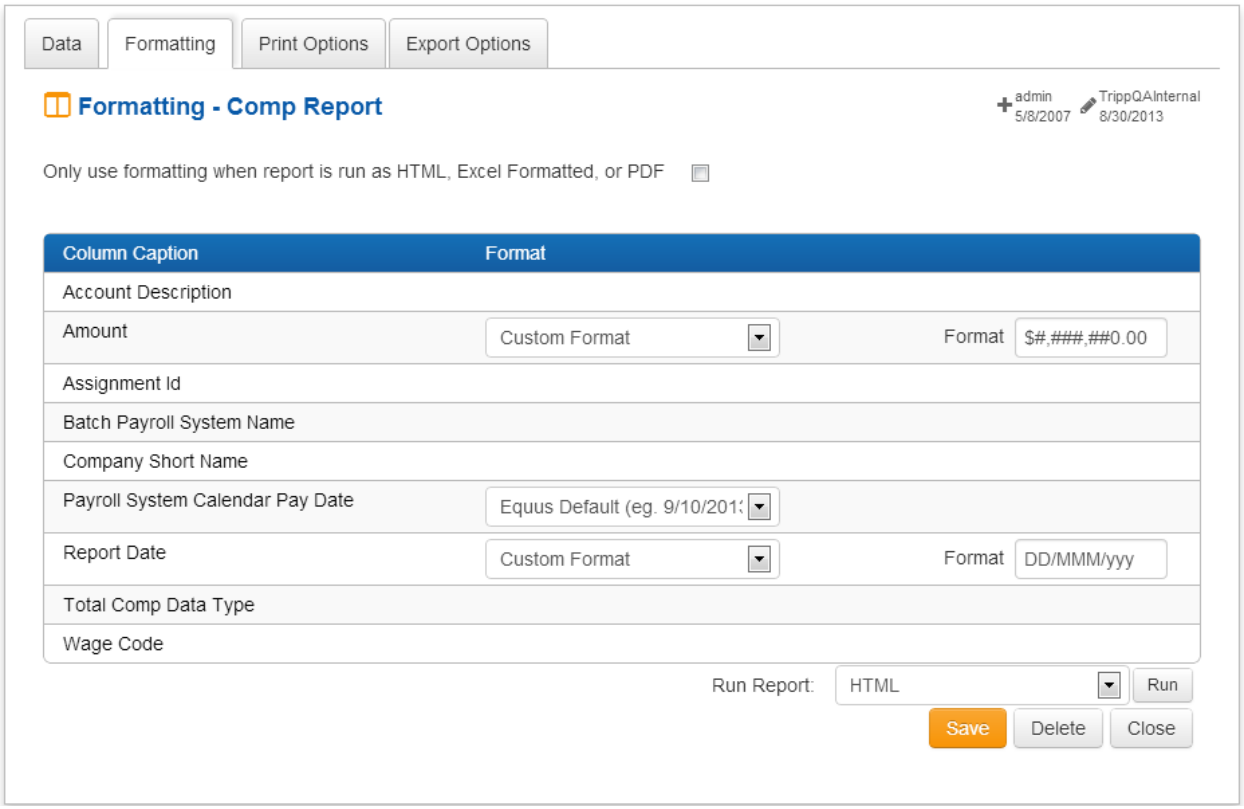
Amount Fields and Account Sums:

- Unspecified: The resulting US format will be the number without decorations (eg 12345.67890123456).
- Equus Default: The resulting US format will be a 2-decimal currency value (eg $12,345.68).
- Whole Amount: The resulting US format will be a whole currency value (eg $12,346).
- Compact: The resulting US format will be a 2-decimal numeric value (eg 12,345.68)
- Extended: The resulting US format will be a 4-decimal currency value (eg $12,345.6789)
- Generic: The resulting US format will be a whole numeric value (eg 12,345)
- Custom Format: The custom amount formatting string is per the Microsoft Custom Numeric Format Strings Specification

Date and Date time columns have default format of MM/DD/YY. Other options include Unspecified, Short Date, Long Date, Short Time, Long Time, Full Date Short Time, Full Date Long Time, General Date Short Time, GeneralDate Long Time, and Custom Format. The Data and Amount lists will display a preview of the format using the current date and time, or an example numeric amount. Please note: The previews are culturally sensitive and may appear different depending on the culture setting of the user.

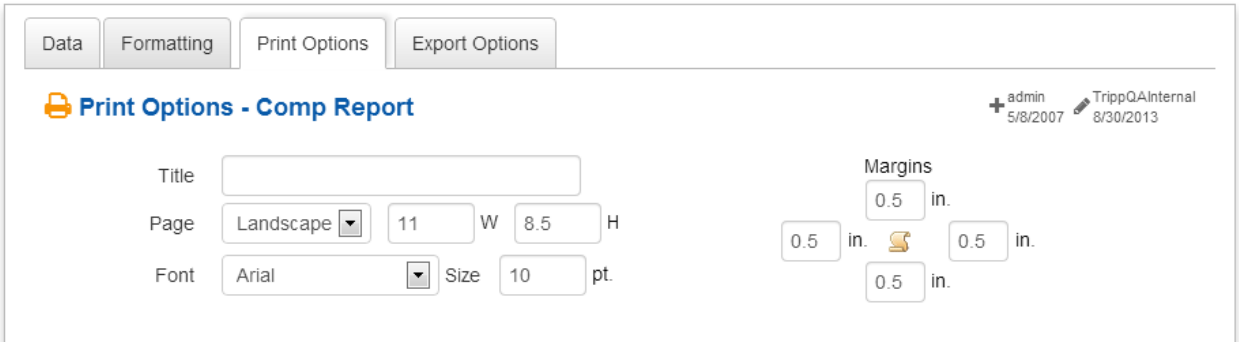
Date and Date and Time Formats:

- Unspecified: The resulting US format will be M/d/yyyy h:mm:ss AM/PM (eg 6/15/2009 1:45:30 PM).
- Equus Default: The resulting US format will be M/d/yyyy (eg 6/15/2009).
- Short Date: The resulting US format will be M/d/yyyy (eg 6/15/2009).
- Long Date: The resulting US format will be ddd, MMM dd, yyyy (eg Monday, June 15, 2009)
- Short Time: The resulting US format will be h:mm AM/PM (eg 1:45 PM)
- Long Time: The resulting US format will be h:mm:ss AM/PM (eg 1:45:30 PM)
- Full Date Short Time: The resulting US format will be ddd, MMM dd, YYYY h:mm AM/PM (eg Monday, June 15, 2009 1:45 PM)
- Full Date Long Time: The resulting US format will be ddd, MMM dd, YYYY h:mm:ss AM/PM (eg Monday, June 15, 2009 1:45:30 PM)
- General Date Short Time: The resulting US format will be M/d/yyyy h:mm AM/PM (eg 6/15/2009 1:45 PM)
- General Date Long Time: The resulting US format will be M/d/yyyy h:mm:ss AM/PM (eg 6/15/2009 1:45:30 PM)
- Custom Format: The custom date/time formatting string is per the Microsoft Custom Date and Time Format Strings Specification
- Custom Calc and Custom SQL Fields:
- Unspecified: The resulting US format will vary based on the underlying data type.
- Custom Format: The custom formatting string for the underlying data type.

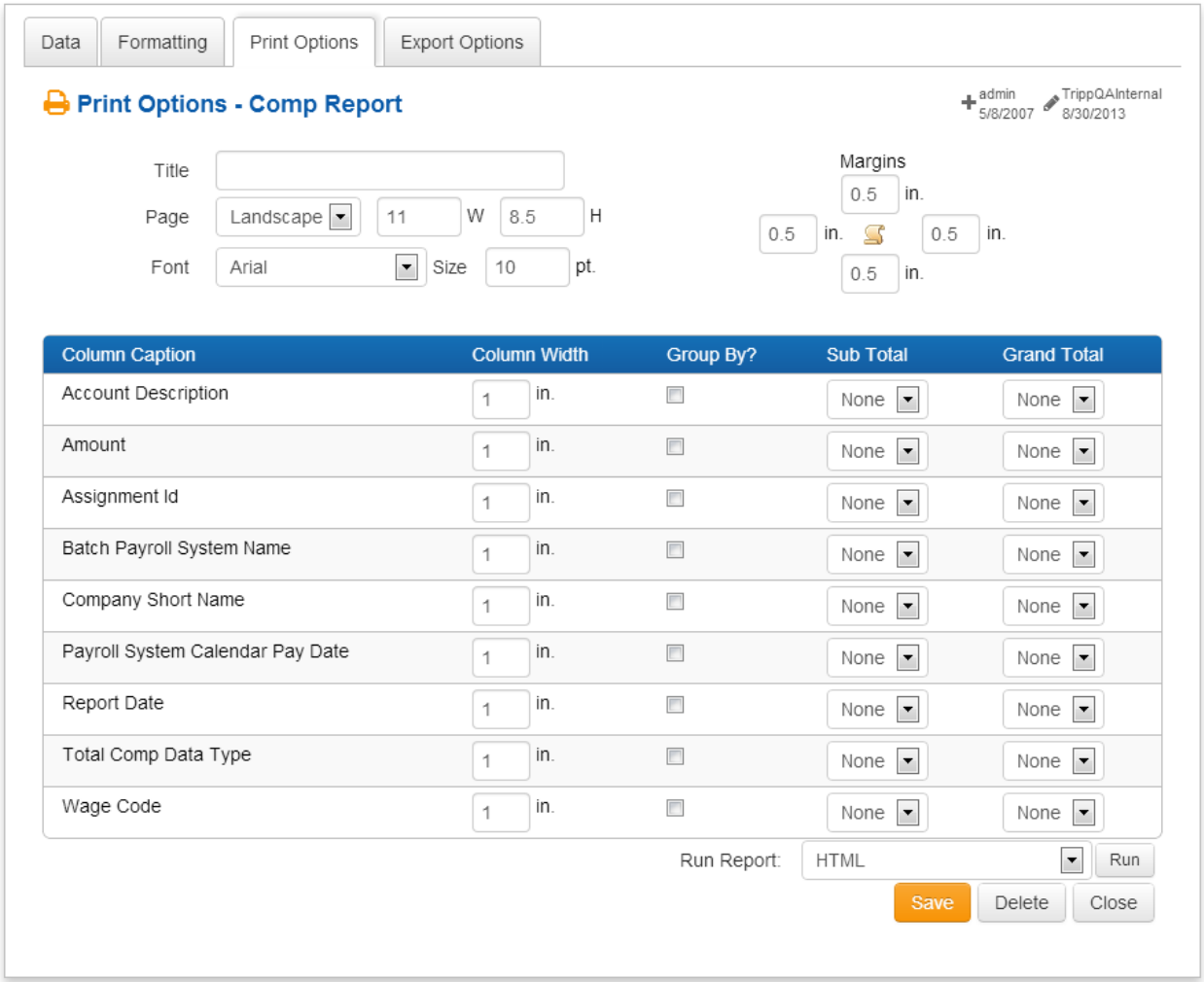


Print Options

The Print Options screen allows users to customize how the resulting generated Report (PDF or Excel Formatted) will look. Report can be formatted to include a title, Page Orientation and Size, Font and Font Size,and Margins. These options are not supported by HTML or Excel Data typereports.



Each column can be formatted by Column Width, Format, Group By, Sub Total and Grand Total. Formatting options are NOT supported by the ExcelData output type. The Group By check box will group together the data inthe column. Sub Totals and Grand Total amounts can be defined by MIN, MAX, FIRST, AVG, SUM, or COUNT.
In the example below, all companies will be grouped together, the accountsum column will have the custom format as well as a sub total and grand total, and the create date will have the custom format.



Output Types

XML Export – Available from the Export link on the Users Report Page. It can also be generated from the Export option on the Run Report drop-down

list when no XSL transform is entered. This functionality runs the report toan XML file in a new Windows browser window. XML is a technical tool for integrating systems.

HTML – Available from the HTML link on the User Report page. It can also be generated by selecting the HTML option in the Run Report drop-down list.This functionality opens the report in a new Window browser window. Report formatting is not included in the HTML report, however limited column data formatting is supported (formatting of date and currency type data is supported, but width, font, grouping and subtotaling is not).

PDF File – Available from the PDF link on the User Report page. It can alsobe generated by selecting the PDF option in the Run Report drop-down list.Report formatting is included in the PDF report.

EXCEL Data – Available from the Excel Data link on the User Report Page. Itcan also be generated by selecting the Excel Data option from the Run Report drop-down list. This functionality opens the report in a new Windows browser window. Report formatting is not included in the Excel Data report.

Excel Formatted – Available from the Excel Formatted link on the User Report Page. It can also be generated by selecting the Excel Formatted option from the Run Report drop-down list. Report formatting is included inthe Excel Formatted report.

Flat Files – Used for payroll feeds in the compensation payroll reportingprocess

XSL Transform - Available from the export link or the Run Export button when an XSL transform is entered. This functionality runs the report to XMLand then transforms it via the entered XSL into a new Windows browser window. XSL is a technical tool for integrating systems.

Payroll Reports – a user report can be generated through the compensation payroll reporting screen when the following fields are set:

Payroll Export – checked Payroll Output
Type – ExcelExport Type – Flat File
Delimiter – specify a character like comma (,) or pipe(|)Header Row - optional

See Example report #4 for more information.

Export Options

Export Type
The export type determines which type of export will be created.

Flat File Delimiter
The character specified here will be used to delimit the fields in the export file created.

Custom Header and Footer (only seen when the Export Type of Flat File is selected)
Text that should appear on the header and/or footer record of the export should be entered here exactly as it should appear on the exported report. In addition to text, the header and footer fields also support the following functions:

- **Sum**(Column Caption) – Displays the sum of a specified column. The column must be specified using its caption.
- **Count**() – Displays a count of all records in the export.
- **GetDate**() – Displays the current date/time.
- **Format**() – Used to format the results from a Sum or GetDate function call.

Column Formatting

Each column can be further formatted and specified in the export report by Format, Fixed Length, Pad Justification, Pad Character and Default Value.

Data | Formatting | Print Options | Export Options

Export Options - Comp Report

admin 5/8/2007 | TrippQAInternal 8/30/2013

Export Type: Flat File

Flat File Delimiter: ,

Header Row? ☐

Custom Header: Test File, Format (GetDate(), "MM/dd/yy")

Hide?	Column Caption	Format	Fixed Length	Pad Justification	Pad Character	Default Value
☐	Account Description			None		
☐	Amount			None		
☐	Assignment Id			None		
☐	Batch Payroll System Na			None		
☐	Company Short Name			None		
☐	Payroll System Calenda			None		
☐	Report Date			None		
☐	Total Comp Data Type			None		
☐	Wage Code			None		

Custom Footer: Count (), Sum(Gross Wages)

Run Report: HTML | Run

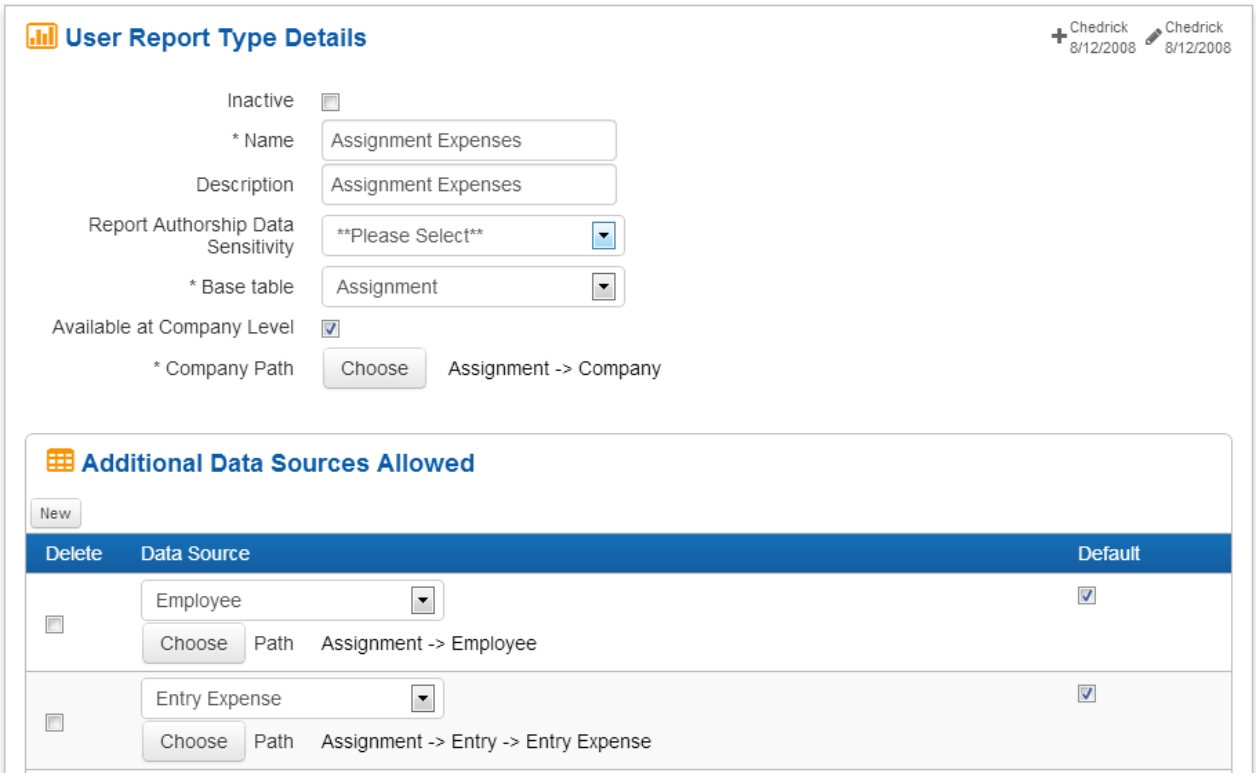
Save | Delete | Close

User Report Types

The user report type determines which data fields will be available during the creation of the user report. Each user report requires a user report type.

Navigation:

Configuration Tab
Documents/Reports menu group
User Report Type menu



Note: To create user reports with multiple data sources, a user should have knowledge of the GROW/AssignmentPro database schema.

The Base Table is the first data source designated for the user report type. From the generic user's perspective, the base table is the "primary table" or the table with the most important data for the report. Technically speaking, the Base Table is the FROM table and every other table you include will be joined to it. Left join if it is a child/sibling (Company to Employee for

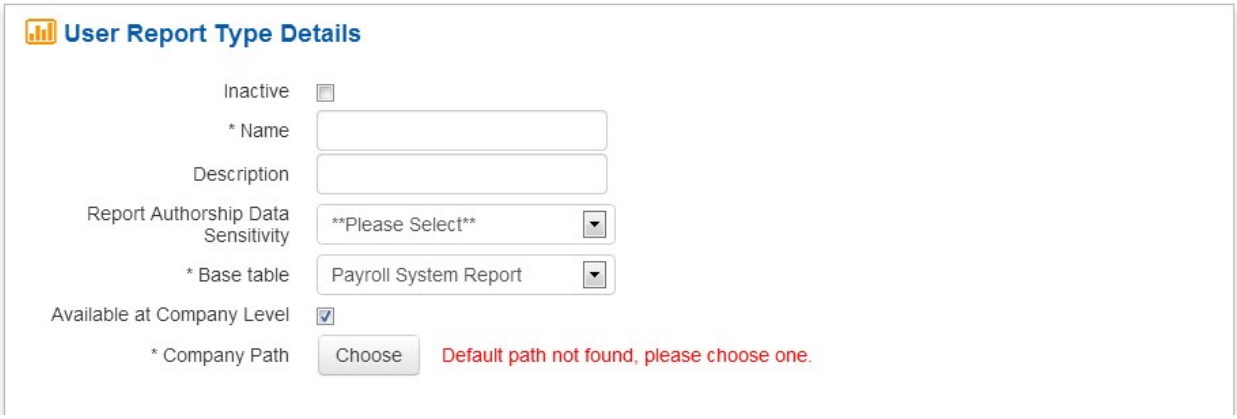
example), Inner join if it is a parent (Cost Estimate to Assignment for example).

The path chosen for each data source will determine how the data sources are joined together. In most cases, the most direct path will give the most desirable results. Several examples of join paths are available at the end of this document in the Examples section.

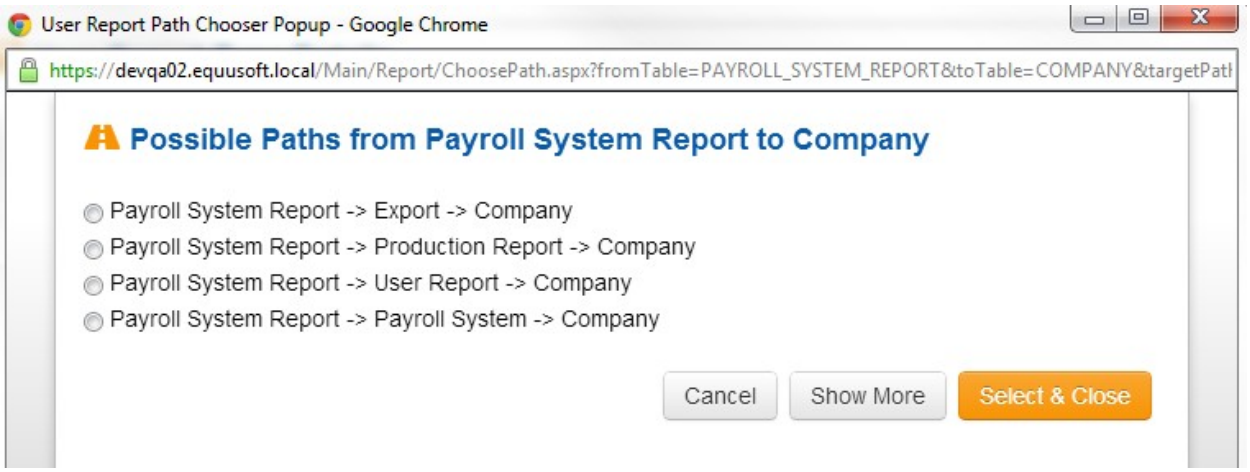
If the report is to be used at the company-level, then the "Available at Company Level" field must be checked and a path from the Base Table to the Company table must be specified.

The External User Type Access can limit the availability of the user report type to a particular set of users. In most cases, only an External Client would have the ability to run user reports at all (by default, internal users will have access to all user report types).

In the user report type example below, a default company path was not found.



This is because there are multiple options for the path. To resolve this, select the "Choose" button and select a path.


User Report Path Chooser Popup - Google Chrome
https://devqa02.equusoft.local/Main/Report/ChoosePath.aspx?fromTable=PAYROLL_SYSTEM_REPORT&toTable=COMPANY&targetPatl
Possible Paths from Payroll System Report to Company
Payroll System Report -> Export -> Company
Payroll System Report -> Production Report -> Company
Payroll System Report -> User Report -> Company
Payroll System Report -> Payroll System -> Company
Cancel
Show More
Select & Close

Running a User Report from a Hyperlink

Overview

A user report can be run directly from a hyperlink, instead of from the screen. This capability includes running reports with filters that might needto change dynamically based on the context for which the report is being run. For example, if the filter for a report is a date, you may want run the report directly and specify today's date in the hyperlink without prompting the user for the date.

This functionality will typically be used when:

1. Creating links on workflow activities or notifications that should run a report.
2. Creating links *within other user reports* that "drill down" into additional details (this is typically done with a calculated field that returns a hyperlink).

Syntax

To run a user report from a link, create the hyperlink and direct the HREF value to the the UserReport_Run page. Include the ID of the User Report inthe URL.

Running a user report with static filter values

This example shows how to run a report with no filter values, or filter valuesthat are static, from a hyperlink.

```
<a href="https://yourdomain/yourwebsite/Main/Report/UserReport_Run.aspx?UserReportID=27">
Run a report directly from a hyperlink</a>
```

A user report with filter values that are specified in the hyperlink

This example shows how to run a report with filter values from a hyperlink.

Each filter value which is specified as "Prompt" = True (e.g. the Prompt fieldon the screen is checked for the filter) must be passed as a value in the hyperlink.

To supply filter values in the link:

- Normally, the UserReport_Run page will prompt you for any parameters that it requires to run that report. To suppress prompting, the following must be added to the URL: &prompt=false
    - **Example:** UserReport_Run.aspx?UserReportID=27**&prompt=false**
- You can pass the values in one of 4 different ways as follows:
    - *By UniqueName* – Every data field in Grow has a behind-the-scenes UniqueName from the Equus data dictionary. A parameter can be passed to a report via the field's unique name using the following convention: UniqueName=Value
        - **Example:** UserReport_Run.aspx?UserReportID=27&prompt=false&ASSIGNMENT!ID=128
        - **Example:** UserReport_Run.aspx?UserReportID=27&prompt=false&COST_ESTIMATE!CREATE_DATE=1/12/2008
    - *By Caption* – If the parameter is also included on the report and has a caption, it can be passed via that caption via: Caption=Value
        - **Example:** UserReport_Run.aspx?UserReportID=27&prompt=false&Company Name=DCL Technologies
        - **Example:** UserReport_Run.aspx?UserReportID=27&prompt=false&COST_ESTIMATE!Report Date=5/24/2007
    - *By Sequence* – If a data field is being used multiple times in the above two methods will not work correctly and it will apply the value to both prompts. When using a single field more than once for a filter (like a date is less than and greater than filter) you can pass a parameter by its sequence: Sequence=Value
        - **Example:** UserReport_Run.aspx?UserReportID=27&prompt=false**&1=500.00**
        - **Example:** UserReport_Run.aspx?UserReportID=27&prompt=false**&1=1/1//2007&2=1/1/2008**
    - *By Context* – Certain querystring parameters are used throughout Grow and also work for passing parameters to reports. They are CompanyId, EmployeeId, AssignmentId, PropertyId, and UserId. They work in the following manner:
        - CompanyID – Will be used to fill any prompt for COMPANY.ID or [ANY TABLE].COMPANY_ID fields.
        - EmployeeID – Will be used to fill any prompt for EMPLOYEE.ID or [ANY TABLE].EMPLOYEE_ID fields.
        - AssignmentID – Will be used to fill any prompt for ASSIGNMENT.ID or [ANY TABLE].ASSIGNMENT_ID fields.

- PropertyID – Will be used to fill any prompt for PROPERTY.ID or [ANY TABLE].PROPERTY_ID fields.
- UserID – The currently logged in user will be used to fill any prompt for USER_ID columns, or any audit fields (CREATE_BY, LAST_UPDATE_BY).

Account Sums – Since a single account sum field can have multiple prompts, a slightly different convention is necessary for them. Account Sum prompting can be accomplished with the following command line parameters:

- From Tax Year=Value: Will fill all "From Tax Year" account sum prompts.
- To Tax Year=Value: Will fill all "From Tax Year" account sum prompts.
- Paid To=Value: Will fill all "Paid To" account sum prompts.
- Payor=Value: Will fill all "Payor" account sum prompts.
- Reimb. Code=Value: Will fill all "Reimbursement Code" account sum prompts.
- Policy Standing=Value: Will fill all "Policy Standing" account sum prompts.
- Blank Payroll Date=Value: Will fill all "Blank Payroll Date" account sum prompts.
- From Payroll Date=Value: Will fill all "From Payroll Date" account sum prompts.
- To Payroll Date=Value: Will fill all "To Payroll Date" account sum prompts.
- From Report Date=Value: Will fill all "From Report Date" account sum prompts.
- To Report Date=Value: Will fill all "To Report Date" account sum prompts.
- From Expense Date=Value: Will fill all "From Expense Date" account sum prompts.
- To Expense Date=Value: Will fill all "To Expense Date" account sum prompts.

Other Notes

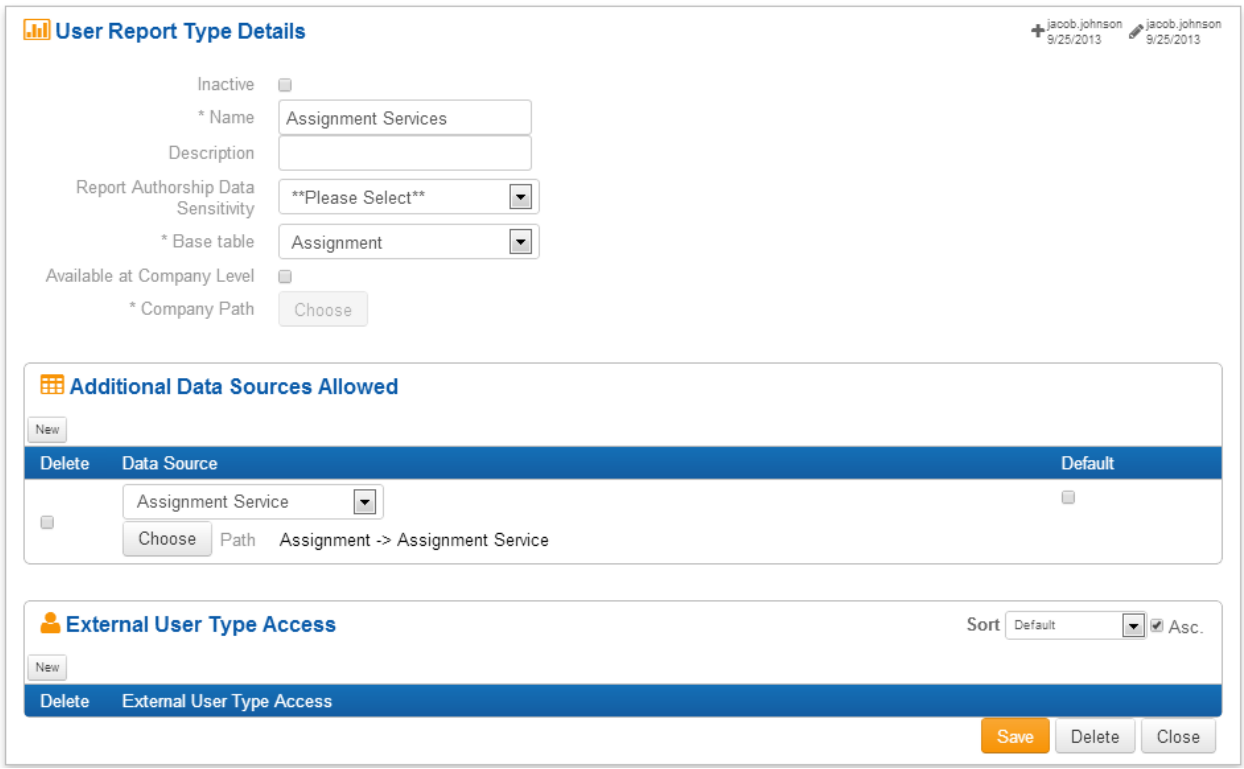
If a parameter is able to be filled from multiple places (CREATE_BY) for example, they are filled in the following order: UniqueName, Caption/Acct Sum, Sequence, Context.

Any parameters passed via the querystring use the operator defined in the filter, not "equals". MyDate=1/1/2008 will run as MyDate > 1/1/2008 if the filter is set up that way.

Examples

Ex 1. Count of authorized services by service and company

As an example of a user report using aggregation, this report will display acount of services authorized for a particular company by service.



User Report Details - Authorized Services by Company

Chedrick 7/15/2008 TrippQAInternal 8/30/2013

Edit Details

Name	Authorized Services by Company
Description	Authorized Services by Company
Report Type	Assignment Services
Report Execution Data Sensitivity	
Report Timeout Seconds	120
Payroll Export	No
Payroll Output Type	

External User Type Access

Sort Default Asc.

External User Type Access

Close

Data Fields

Chedrick 7/15/2008 TrippQAInternal 8/30/2013

Edit Data Fields

Selected Data Fields

Sort Default Asc.

Hide	Sequence	Sort	Aggregate	Field	Column Caption
No	1			Assignment Service: Service	Service
No	2		Count	Assignment Service: Authorized	Authorized
No	3	Asc		Assignment: Company	Company

Filters

Chedrick 7/15/2008 TrippQAInternal 8/30/2013

Edit Filters

Filters

Sort Default Asc.

Order	( )	Field	Comparison	Comparison Value	( )	And/Or	Prompt
1		Assignment Service: Authorized	Is Equal To	Yes		And	No

Once the user selects any option from the Run Report drop-down list, the system will prompt the user for each of the filters designated for prompting:

User Report

Report	Authorized Services by Company
Description	Authorized Services by Company

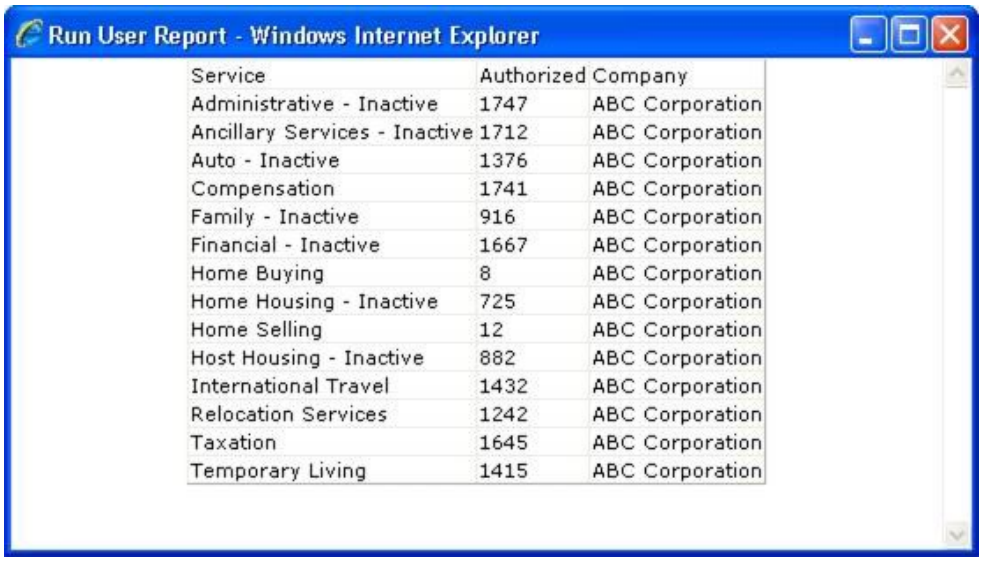
Parameters

Assignment Service: Authorized **Is Equal To** Yes

Run Report

The filter value can be defaulted by the report and can be modified by theuser.

After the user clicks the Run Report link, the report will generate.



Service	Authorized	Company
Administrative - Inactive	1747	ABC Corporation
Ancillary Services - Inactive	1712	ABC Corporation
Auto - Inactive	1376	ABC Corporation
Compensation	1741	ABC Corporation
Family - Inactive	916	ABC Corporation
Financial - Inactive	1667	ABC Corporation
Home Buying	8	ABC Corporation
Home Housing - Inactive	725	ABC Corporation
Home Selling	12	ABC Corporation
Host Housing - Inactive	882	ABC Corporation
International Travel	1432	ABC Corporation
Relocation Services	1242	ABC Corporation
Taxation	1645	ABC Corporation
Temporary Living	1415	ABC Corporation

Ex 2. Assignees by Relocation Coordinator (Resource Load Report)

This example displays the ability to report on a resource's usage across the system. By adding the Resource Role Metadata data source, a user can specify the role to be reported on. In this example, the relocation or assignment coordinator role is used.

User Report Type Details

Inactive	☐
* Name	Employee & Assignment Info
Description	
Report Authorship Data Sensitivity	**Please Select**
* Base table	Assignment
Available at Company Level	☑
* Company Path	Choose Assignment -> Company

Additional Data Sources Allowed

New

Delete	Data Source	Default
☐	Employee Choose Path Assignment -> Employee	☐
☐	Resource Assignment Choose Path Assignment -> Resource Assignment	☐
☐	Resource Choose Path Assignment -> Resource	☐
☐	Resource Role Metadata Choose Path Assignment -> Resource Assignment -> Resource Role Metadata	☐

In the filter section of this report, the description of the resource role is used to specify which role the report should filter on. Then a name can be specified from the Resource table to determine a resource's usage across the system.

User Report Details - Coordinator Load Report

jacob.johnson 9/25/2013 jacob.johnson 9/25/2013

Edit Details

Name	Coordinator Load Report
Description	
Report Type	Employee & Assignment Info
Report Execution Data Sensitivity	
Report Timeout Seconds	120
Payroll Export	No
Payroll Output Type	

External User Type Access

Sort Default Asc.

External User Type Access

Close

Data Fields

jacob.johnson 9/25/2013 jacob.johnson 9/25/2013

Edit Data Fields

Selected Data Fields

Sort Default Asc.

Hide	Sequence	Sort	Aggregate	Field	Column Caption
No	1			Assignment: Company	Company
No	2			Employee: First Name	First Name
No	3			Employee: Last Name	Last Name
No	4			Assignment: Relocation Effective Date	Relocation Effective Date
No	5			Assignment: Scheduled End Date	Scheduled End Date
No	6			Resource: Name	Name

Filters

jacob.johnson 9/25/2013 jacob.johnson 9/25/2013

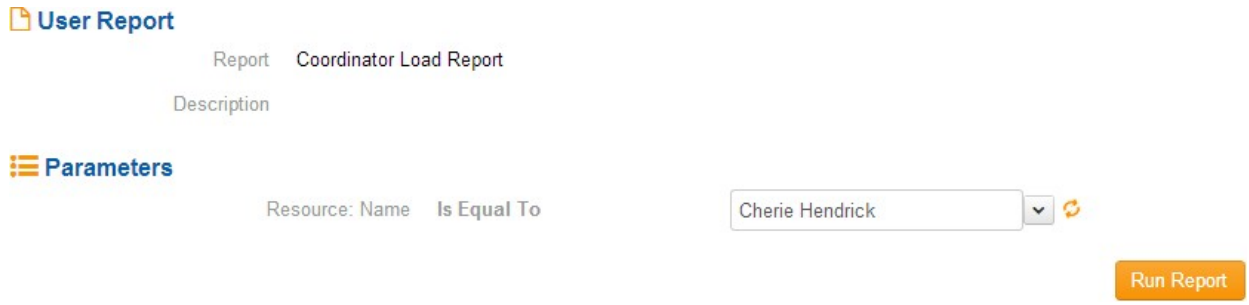
Edit Filters

Filters

Sort Default Asc.

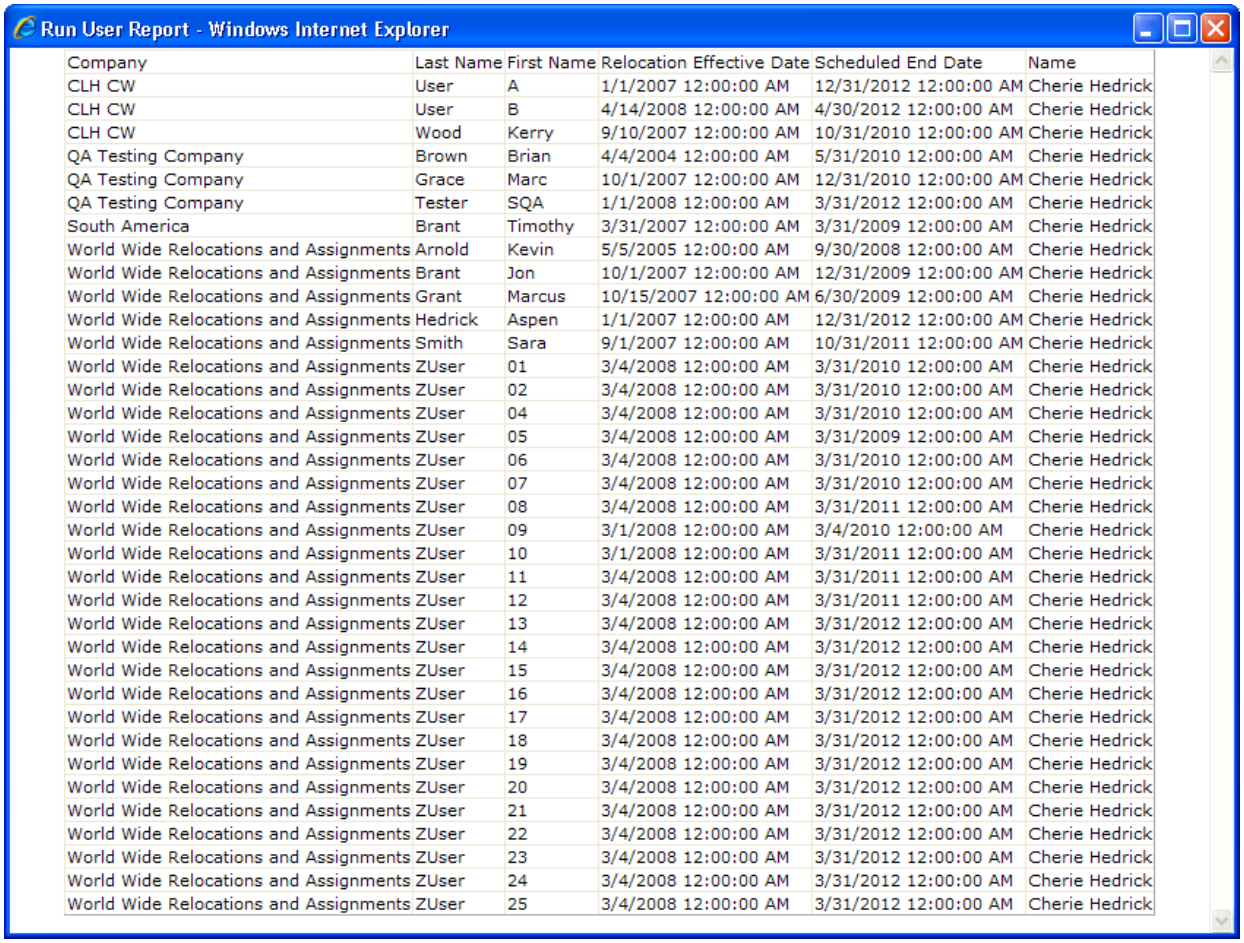
Order	( )	Field	Comparison	Comparison Value	( )	And/Or	Prompt
1		Assignment: Inactive	Is Equal To	No		And	No
2		Resource Role Metadata: Description	Is Equal To	Relocation Coordinator		And	No
3		Resource: Name	Is Equal To	Cherie Hendrick			Yes

Once the user selects any option from the Run Report drop-down list, the system will prompt the user for each of the filters designated for prompting:



The filter value can be defaulted in the comparison value field on the report and can be modified by the user.

After the user clicks the Run Report link, the report will generate.



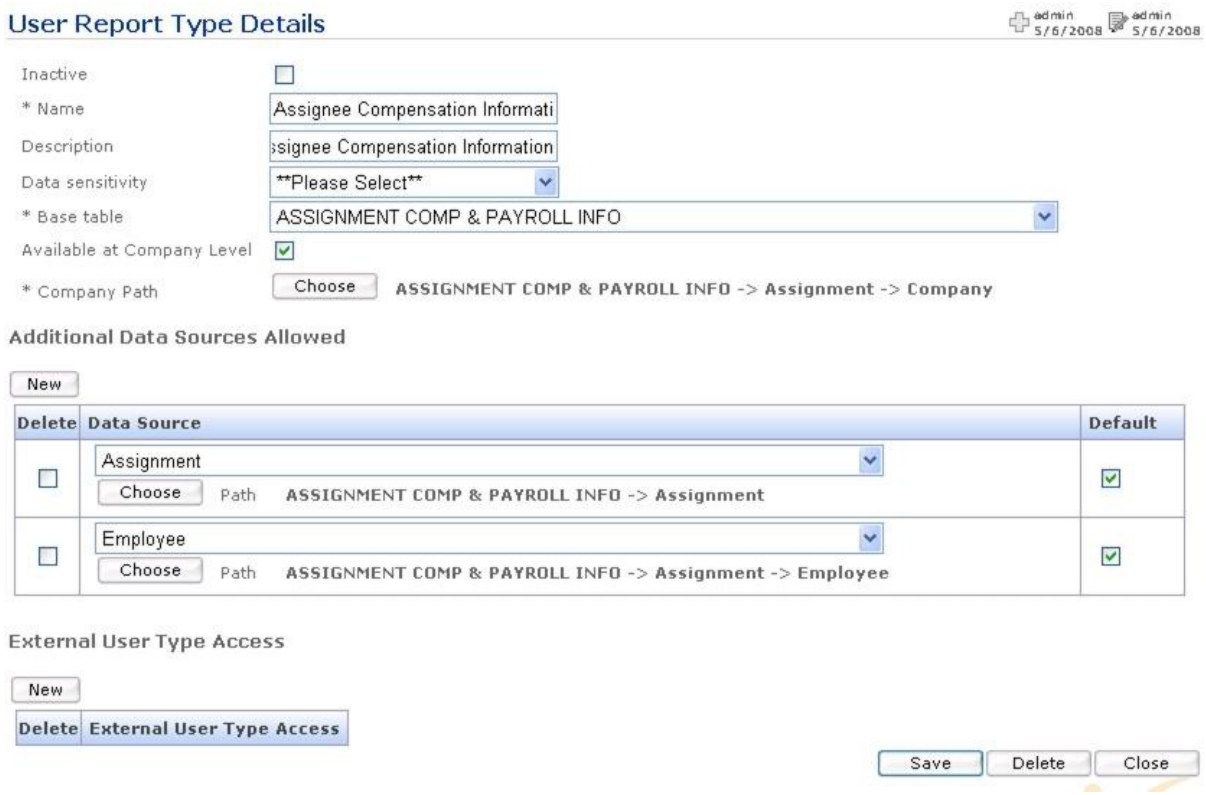
Company	Last Name	First Name	Relocation Effective Date	Scheduled End Date	Name
CLH CW	User	A	1/1/2007 12:00:00 AM	12/31/2012 12:00:00 AM	Cherie Hedrick
CLH CW	User	B	4/14/2008 12:00:00 AM	4/30/2012 12:00:00 AM	Cherie Hedrick
CLH CW	Wood	Kerry	9/10/2007 12:00:00 AM	10/31/2010 12:00:00 AM	Cherie Hedrick
QA Testing Company	Brown	Brian	4/4/2004 12:00:00 AM	5/31/2010 12:00:00 AM	Cherie Hedrick
QA Testing Company	Grace	Marc	10/1/2007 12:00:00 AM	12/31/2010 12:00:00 AM	Cherie Hedrick
QA Testing Company	Tester	SQA	1/1/2008 12:00:00 AM	3/31/2012 12:00:00 AM	Cherie Hedrick
South America	Brant	Timothy	3/31/2007 12:00:00 AM	3/31/2009 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	Arnold	Kevin	5/5/2005 12:00:00 AM	9/30/2008 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	Brant	Jon	10/1/2007 12:00:00 AM	12/31/2009 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	Grant	Marcus	10/15/2007 12:00:00 AM	6/30/2009 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	Hedrick	Aspen	1/1/2007 12:00:00 AM	12/31/2012 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	Smith	Sara	9/1/2007 12:00:00 AM	10/31/2011 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	01	3/4/2008 12:00:00 AM	3/31/2010 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	02	3/4/2008 12:00:00 AM	3/31/2010 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	04	3/4/2008 12:00:00 AM	3/31/2010 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	05	3/4/2008 12:00:00 AM	3/31/2009 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	06	3/4/2008 12:00:00 AM	3/31/2010 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	07	3/4/2008 12:00:00 AM	3/31/2010 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	08	3/4/2008 12:00:00 AM	3/31/2011 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	09	3/1/2008 12:00:00 AM	3/4/2010 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	10	3/1/2008 12:00:00 AM	3/31/2011 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	11	3/4/2008 12:00:00 AM	3/31/2011 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	12	3/4/2008 12:00:00 AM	3/31/2011 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	13	3/4/2008 12:00:00 AM	3/31/2012 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	14	3/4/2008 12:00:00 AM	3/31/2012 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	15	3/4/2008 12:00:00 AM	3/31/2012 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	16	3/4/2008 12:00:00 AM	3/31/2012 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	17	3/4/2008 12:00:00 AM	3/31/2012 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	18	3/4/2008 12:00:00 AM	3/31/2012 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	19	3/4/2008 12:00:00 AM	3/31/2012 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	20	3/4/2008 12:00:00 AM	3/31/2012 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	21	3/4/2008 12:00:00 AM	3/31/2012 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	22	3/4/2008 12:00:00 AM	3/31/2012 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	23	3/4/2008 12:00:00 AM	3/31/2012 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	24	3/4/2008 12:00:00 AM	3/31/2012 12:00:00 AM	Cherie Hedrick
World Wide Relocations and Assignments	ZUser	25	3/4/2008 12:00:00 AM	3/31/2012 12:00:00 AM	Cherie Hedrick

Ex 3. International Assignees' Compensation Information

This report is designed to retrieve an assignee's most recent effective salary that will be used for Compensation Worksheet calculations.

The assignment compensation salary data source contains the international salary amounts used for calculating compensation worksheet amounts. When reporting off of this data source in coordination with the employee or assignment data sources, multiple rows of data may appear on the report for a particular assignee. This is due to the historical salary data stored in the system.

A view has been added to the system to pull back the 2 most recent effective salary amounts. This view is named the "ASSIGNEE COMP & PAYROLL INFO" data source.



Two parameters were added to this report to limit the results to active assignees from the TMR Inc. company.

User Report Details - Int'l Assignees' Compensation Info

jacob.johnson 9/25/2013 jacob.johnson 9/25/2013

Edit Details

Name	Int'l Assignees' Compensation Info
Description	Int'l Assignees' Compensation Info
Report Type	Assignee Compensation Info
Report Execution Data Sensitivity	
Report Timeout Seconds	120
Payroll Export	No
Payroll Output Type	

External User Type Access

Sort Default Asc.

External User Type Access

Close

Data Fields

jacob.johnson 9/25/2013 jacob.johnson 9/25/2013

Edit Data Fields

Selected Data Fields

Sort Default Asc.

Hide	Sequence	Sort	Aggregate	Field	Column Caption
No	1			Employee: First Name	First Name
No	2			Employee: Last Name	Last Name
No	3			ASSIGNMENT COMP & PAYROLL INFO: Current Annual Base Pay Amount	Current Annual Base Pay Amount
No	4			ASSIGNMENT COMP & PAYROLL INFO: Current Annual Base Pay Currency	Current Annual Base Pay Currency
No	5			ASSIGNMENT COMP & PAYROLL INFO: Current Base Bay Effective Date	Current Base Bay Effective Date
No	6			ASSIGNMENT COMP & PAYROLL INFO: Previous Annual Base Pay Amount	Previous Annual Base Pay Amount
No	7			ASSIGNMENT COMP & PAYROLL INFO: Previous Annual Base Pay Currency	Previous Annual Base Pay Currency
No	8			ASSIGNMENT COMP & PAYROLL INFO: Previous Base Pay Effective Date	Previous Base Pay Effective Date

Filters

jacob.johnson 9/25/2013 jacob.johnson 9/25/2013

Edit Filters

Filters

Sort Default Asc.

Order	( )	Field	Comparison	Comparison Value	( )	And/Or	Prompt
1		Assignment: Company	Is Equal To	TMR Inc.		And	Yes
2		Assignment: Inactive	Is Equal To	No			No

Once the user selects any option from the Run Report drop-down list, the system will prompt the user for each of the filters designated for prompting:

User Report

Report Int'l Assignees' Compensation Info

Description Int'l Assignees' Compensation Info

Parameters

Assignment: Company **Is Equal To** TMR Inc.

Run Report

The filter value can be defaulted by the report and can be modified by the user.

After the user clicks the Run Report link, the report will generate.

Run User Report - Windows Internet Explorer

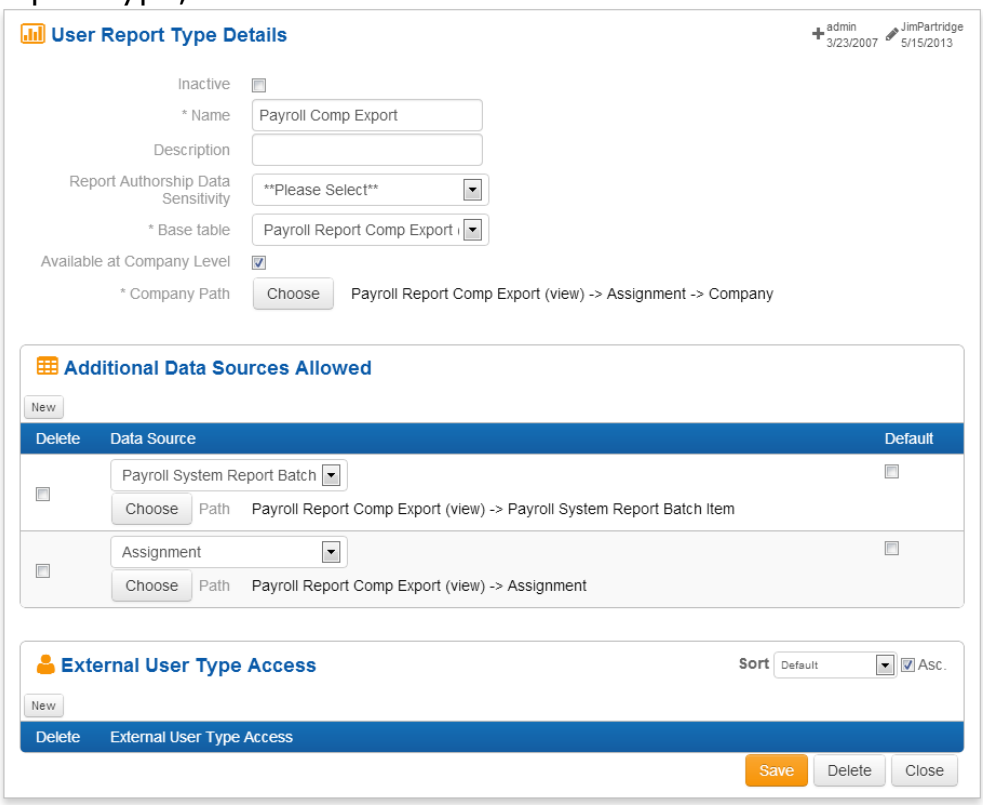
Last Name	First Name	Current Annual Base Pay Amount	Current Annual Base Pay Currency	Current Base Bay Effective Date	Previous Annual Base Pay Amount	Previous Annual Base Pay Currency	Previous Base Pay Effective Date
Brett	George	600000.0000	CAD	1/1/2008 12:00:00 AM	555555.5500	CAD	1/1/2007 12:00:00 AM
Fry	French	200000.0000	USD	7/1/2007 12:00:00 AM	180000.0000	USD	1/1/2007 12:00:00 AM
Johnson	Jeff	150000.0000	USD	1/1/2007 12:00:00 AM			
Jones	George	260000.0000	USD	12/1/2007 12:00:00 AM	250000.0000	USD	1/1/2007 12:00:00 AM
Jones	John Paul	264000.0000	USD	1/1/2008 12:00:00 AM	240000.0000	USD	1/1/2007 12:00:00 AM
Methodology	Mr. Allowance	250000.0000	USD	1/1/2007 12:00:00 AM			
Reynolds	Tyler	140000.0000	USD	3/1/2008 12:00:00 AM	120000.0000	USD	3/1/2007 12:00:00 AM
Seger	Bob	200000.0000	USD	1/1/2008 12:00:00 AM	150000.0000	USD	1/1/2007 12:00:00 AM
TESTER	Charlize	400000.0000	GBP	1/1/2007 12:00:00 AM			
Tester	Johnny						

Ex 4. Compensation Worksheet Payroll Feed

The data required for a typical payroll feed is spread out across several data sources or tables in GROW/AssignmentPro. This reporting requirement is made easier by a view (Payroll Report Comp Export) that is included in the system as an available data source.

A user report type supporting a report to be used in the compensation worksheet payroll reporting process must include the Payroll System Report Batch Item data source.

The Assignment or Employee data sources could easily be added to this user report type, as seen below.



This user report will be sorted by the Employee's Name and then the wage code of each payment request.

A user report that will be used in the compensation worksheet payroll reporting process requires the following settings:

Payroll Export – checked
Payroll Output Type – Excel
Export Type – Flat File
Delimiter – specify a character like comma (,) or pipe(|)
Header Row – optional

User Report Details - Comp Worksheet Payroll Feed

jacob.johnson 9/25/2013 jacob.johnson 9/25/2013

Edit Details

Name	Comp Worksheet Payroll Feed
Description	
Report Type	Payroll Comp Export
Report Execution Data Sensitivity	
Report Timeout Seconds	120
Payroll Export	No
Payroll Output Type	

External User Type Access

Sort Default Asc.

External User Type Access

Close

Data Fields

jacob.johnson 9/25/2013 jacob.johnson 9/25/2013

Edit Data Fields

Selected Data Fields

Sort Default Asc.

Hide	Sequence	Sort	Aggregate	Field	Column Caption
No	1	Asc		Payroll Report Comp Export (view): Employee Name	Employee Name
No	2			Assignment: To Payroll ID	To Payroll ID
No	3	Asc		Payroll Report Comp Export (view): Wage Code	Wage Code
No	4			Payroll Report Comp Export (view): Amount	Amount
No	5			Payroll Report Comp Export (view): Currency	Currency
No	6			Payroll Report Comp Export (view): Payment Method	Payment Method

Filters

jacob.johnson 9/25/2013 jacob.johnson 9/25/2013

Edit Filters

Filters

Sort Default Asc.

Order	( )	Field	Comparison	Comparison Value	( )	And/Or	Prompt
1		Payroll System Report Batch Item: Id	Is Equal To	0			Yes

This report was generated from the Compensation Worksheet Payroll Reporting screen.

Comp_Worksheet_Payroll_Feed-29Jun2007-17May2008[1].txt - Notepad

File Edit Format View Help

```
Employee Name,To Payroll Id,Wage Code,Amount,Currency,Payment Method
"Jones, George",,USpri-ded,-6591.7970,USD,
"Jones, George",,USpri-ded,-88.8889,USD,
"Jones, George",,USpri-ded,-6591.7970,USD,
"Jones, George",,USpri-ded,-88.8889,USD,
"Jones, George",,X901,1476.0517,USD,
"Jones, George",,X901,1476.0517,USD,
"Jones, George",,X906,11800.1303,USD,
"Jones, George",,X906,11800.1303,USD,
"Reynolds, Tyler",,USpri-ded,-187.5129,EUR,
"Reynolds, Tyler",,USpri-ded,-1377.4728,GBP,
"Reynolds, Tyler",,USpri-ded,-187.5129,EUR,
"Reynolds, Tyler",,USpri-ded,-1377.4728,GBP,
"Reynolds, Tyler",,X901,774.3808,GBP,
"Reynolds, Tyler",,X901,774.3808,GBP,
"Reynolds, Tyler",,X902,1377.4728,GBP,
"Reynolds, Tyler",,X902,1377.4728,GBP,
"Reynolds, Tyler",,X904,603.7990,EUR,
"Reynolds, Tyler",,X904,603.7990,EUR,
"Reynolds, Tyler",,X906,3725.2052,GBP,
"Reynolds, Tyler",,X906,3725.2052,GBP,
"Seger, Bob",,USpri-ded,-1155.5649,USD,
"Seger, Bob",,USpri-ded,-1275.9583,USD,
"Seger, Bob",,USpri-ded,-1155.5649,USD,
"Seger, Bob",,USpri-ded,-1275.9583,USD,
"Seger, Bob",,X901,1155.5649,USD,
"Seger, Bob",,X901,1155.5649,USD,
"Seger, Bob",,X902,2911.4836,USD,
"Seger, Bob",,X902,2911.4836,USD,
"Seger, Bob",,X904,1275.9583,USD,|
"Seger, Bob",,X904,1275.9583,USD,
"Seger, Bob",,X906,6250.0000,USD,
"Seger, Bob",,X906,6250.0000,USD,
```

Note: Please see the ***Compensation Module User Guide*** *for more information about the payroll reporting feature.*

Ex 5. Overdue Workflow Activities

The Overdue Workflow Activities report will give a manager visibility into tasks or processes that are overdue. This report runs for all overdue activities prior to a specific date.

User Report Type Details

jacob.johnson 9/25/2013 jacob.johnson 9/25/2013

Inactive	☐
* Name	Workflow
Description	
Report Authorship Data Sensitivity	**Please Select**
* Base table	Workflow
Available at Company Level	☐
* Company Path	Choose

Additional Data Sources Allowed

New

Delete	Data Source	Default
☐	Workflow Activity Choose Path Workflow -> Workflow Activity	☑
☐	Workflow Log Choose Path Workflow -> Workflow Log	☐
☐	Assignment Choose Path Workflow -> Assignment	☐
☐	Employee Choose Path Workflow -> Employee	☐
☐	Company Choose Path Workflow -> Company	☐

This report could be modified to show all overdue activities for a specific resource (user) of the system by adding an additional filter to the report. The filter would be the Assigned Resource field. By selecting to for the filter to be prompted the user running the report would be able to modify the report parameter of the report prior to executing the report.

User Report Details - Overdue Workflow Activities

jacob.johnson 9/25/2013 jacob.johnson 9/25/2013

Edit Details

Name	Overdue Workflow Activities
Description	
Report Type	Workflow
Report Execution Data Sensitivity	
Report Timeout Seconds	120
Payroll Export	No
Payroll Output Type	

External User Type Access

Sort Default Asc.

External User Type Access

Close

Data Fields

jacob.johnson 9/25/2013 jacob.johnson 9/25/2013

Edit Data Fields

Selected Data Fields

Sort Default Asc.

Hide	Sequence	Sort	Aggregate	Field	Column Caption
No	1			Workflow: Id	Id
No	2			Workflow: Name	Name
No	3			Workflow Activity: Name	Name
No	4			Workflow Activity: Due Date	Due Date
No	5			Workflow Activity: Assigned Resource	Assigned Resource

Filters

jacob.johnson 9/25/2013 jacob.johnson 9/25/2013

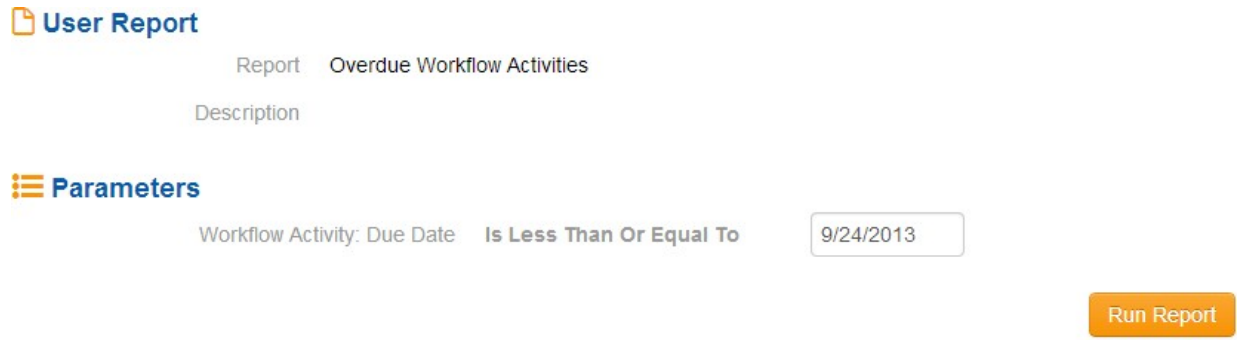
Edit Filters

Filters

Sort Default Asc.

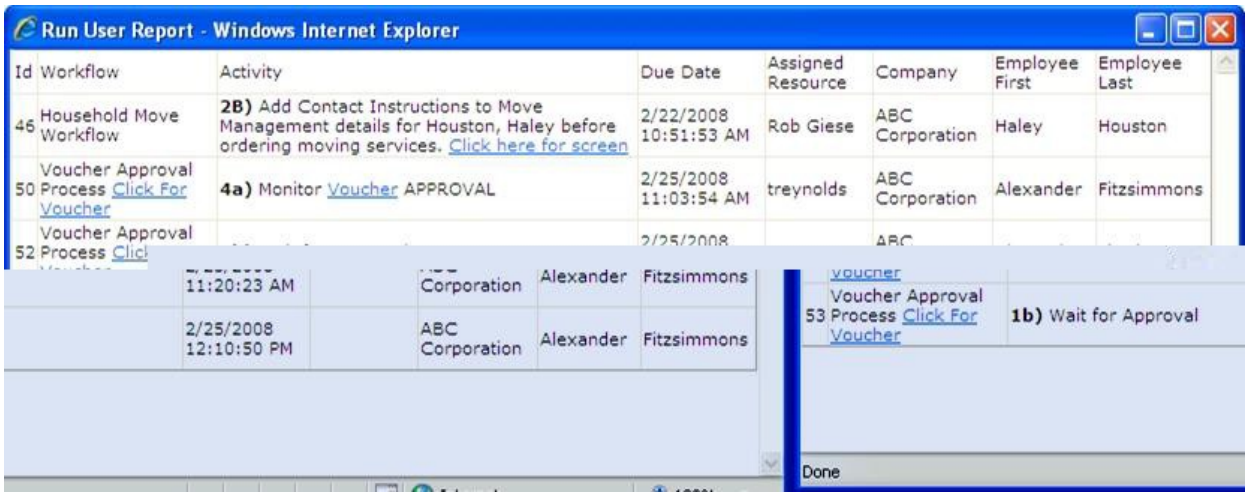
Order	( )	Field	Comparison	Comparison Value	( )	And/Or	Prompt
1		Workflow Activity: Complete Date	Is Blank			And	No
2		Workflow Activity: Cancel Date	Is Blank			And	No
3		Workflow: Complete Date	Is Blank			And	No
4		Workflow: Cancel Date	Is Blank			And	No
5		Workflow Activity: Due Date	Is Less Than Or Equal To	9/24/2013			Yes

Once the user selects any option from the Run Report drop-down list, the system will prompt the user for each of the filters designated for prompting:



The filter value can be defaulted in the comparison value field on the report and can be modified by the user.

After the user clicks the Run Report link, the report will generate.



The links included in the report output are the functional links that were created by GROW workflow. These links can be used from this report to access the appropriate screens to complete the overdue tasks.

Ex 6. Assignment Taxes and Expenses

The example Assignment Taxes and Expenses report will report on each Assignment that has expenses and tax assistance/withholding. There is one record for each tax results record.

User Report Type Details

admin 6/16/2009 admin 6/16/2009

Inactive	☐
* Name	Tax & Expense
Description	Tax & Expense Details
Data sensitivity	**Please Select**
* Base table	Tax and Expense Detail (View)
Available at Company Level	☑
* Company Path	Choose **Tax and Expense Detail (View) -> Company**

Additional Data Sources Allowed

New

Delete	Data Source	Default
☐	Company Choose Path **Tax and Expense Detail (View) -> Company**	☑
☐	Entry Expense Choose Path **Tax and Expense Detail (View) -> Entry Expense**	☑

External User Type Access

New

Delete	External User Type Access

Save Delete Close

This report shows all of the fields in the Tax and Expense view.

User Report Details - Assignment Taxes and Expenses

admin 6/17/2009 admin 6/17/2009

Edit Details

Name	Assignment Taxes and Expenses
Description	Shows all fields in Tax and Expense View
Report Type	Tax & Expense
Report Timeout Seconds	120
Payroll Export	No

Payroll Output Type

External User Type Access

External User Type Access

Close

Data Fields

admin 6/17/2009 admin 6/17/200

Edit Data Fields

Selected Data Fields

Hide	Sequence	Sort	Aggregate	Field	Column Caption
No	1			Tax and Expense Detail (View): Assignment Id	Assignment Id
No	2			Tax and Expense Detail (View): Employee Name	Employee Name
No	3			Tax and Expense Detail (View): Company ID	Company ID
No	4			Tax and Expense Detail (View): Company Name	Company Name
No	5			Tax and Expense Detail (View): Deductible Federal	Deductible Federal
No	6			Tax and Expense Detail (View): Entry Expense ID	Entry Expense ID
No	7			Tax and Expense Detail (View): Excludable Nonreportable	Excludable Nonreportable
No	8			Tax and Expense Detail (View): Entry Expense Tax Id	Entry Expense Tax Id
No	9			Tax and Expense Detail (View): Excludable Reportable	Excludable Reportable
No	10			Tax and Expense Detail (View): Federal Taxes	Federal Taxes
No	11			Tax and Expense Detail (View): Gross Wages	Gross Wages
No	12			Tax and Expense Detail (View): Net Wages	Net Wages
No	13			Tax and Expense Detail (View): Paid To Employee	Paid To Employee
No	14			Tax and Expense Detail (View): Paid To Other	Paid To Other
No	15			Tax and Expense Detail (View): Payroll Report Id	Payroll Report Id
No	16			Tax and Expense Detail (View): Reversed Entry Expense Tax Id	Reversed Entry Expense Tax Id
No	17			Tax and Expense Detail (View): Special Taxes	Special Taxes
No	18			Tax and Expense Detail (View): State Taxes	State Taxes
No	19			Tax and Expense Detail (View): Tax Assistance Federal	Tax Assistance Federal
No	20			Tax and Expense Detail (View): Tax Assistance Medicare	Tax Assistance Medicare
No	21			Tax and Expense Detail (View): Tax Assistance Oasdi	Tax Assistance Oasdi
No	22			Tax and Expense Detail (View): Tax Assistance Rrta1a	Tax Assistance Rrta1a
No	23			Tax and Expense Detail (View): Tax Assistance Rrta1b	Tax Assistance Rrta1b
No	24			Tax and Expense Detail (View): Tax Assistance Special Taxes	Tax Assistance Special Taxes
No	25			Tax and Expense Detail (View): Tax Assistance State	Tax Assistance State
No	26			Tax and Expense Detail (View): Tax Calc Type	Tax Calc Type

No	27			Tax and Expense Detail (View): Tax State	Tax State
No	28			Tax and Expense Detail (View): Tax Year	Tax Year
No	29			Tax and Expense Detail (View): Taxcalc Batch Id	Taxcalc Batch Id
No	30			Tax and Expense Detail (View): Total Tax Assistance	Total Tax Assistance
No	31			Tax and Expense Detail (View): Total Taxes	Total Taxes
No	32			Tax and Expense Detail (View): Wages Ceiling Federal	Wages Ceiling Federal
No	33			Tax and Expense Detail (View): Wages Ceiling Medicare	Wages Ceiling Medicare
No	34			Tax and Expense Detail (View): Wages Ceiling Oasdi	Wages Ceiling Oasdi
No	35			Tax and Expense Detail (View): Wages Ceiling Rrta1a	Wages Ceiling Rrta1a
No	36			Tax and Expense Detail (View): Wages Ceiling Rrta1b	Wages Ceiling Rrta1b
No	37			Tax and Expense Detail (View): Wages Ceiling Special Taxes	Wages Ceiling Special Taxes
No	38			Tax and Expense Detail (View): Wages Ceiling State	Wages Ceiling State
No	39			Tax and Expense Detail (View): Wages No Ceiling Federal	Wages No Ceiling Federal
No	40			Tax and Expense Detail (View): Wages No Ceiling Medicare	Wages No Ceiling Medicare
No	41			Tax and Expense Detail (View): Wages No Ceiling Oasdi	Wages No Ceiling Oasdi
No	42			Tax and Expense Detail (View): Wages No Ceiling Rrta1a	Wages No Ceiling Rrta1a
No	43			Tax and Expense Detail (View): Wages No Ceiling Rrta1b	Wages No Ceiling Rrta1b
No	44			Tax and Expense Detail (View): Wages No Ceiling Special Taxes	Wages No Ceiling Special Taxes
No	45			Tax and Expense Detail (View): Wages No Ceiling State	Wages No Ceiling State
No	46			Tax and Expense Detail (View): Withholding Medicare	Withholding Medicare
No	47			Tax and Expense Detail (View): Withholding Oasdi	Withholding Oasdi

Filters

admin 6/17/2009 admin 6/17/2009

Edit Filters

Filters

Order	( )	Field	Comparison	Comparison Value	( )	And/Or	Prompt

Here is a view of the report:

Run User Report - Microsoft Internet Explorer

Assignment Id	Employee Name	Company ID	Company Name	Deductible Federal	Entry Expense ID	Entry Expense Tax Id	Excludable Nonreportable	Excludable Reportable	Federal Taxes	Gross Wages	Net Wages
100955	Dillon, Matt	16	JLM Grossup PRSR	0.0000	2041	1876	0.0000	0.0000	133.2800	1332.8400	800.000
100955	Dillon, Matt	16	JLM Grossup PRSR	0.0000	2040	1877	700.0000	0.0000	0.0000	0.0000	0.0000
100955	Dillon, Matt	16	JLM Grossup PRSR	600.0000	2039	1878	0.0000	0.0000	20.0000	800.0000	600.000
100955	Dillon, Matt	16	JLM Grossup PRSR	0.0000	2044	1895	0.0000	0.0000	1083.2900	10832.8700	6500.00
100955	Dillon, Matt	16	JLM Grossup PRSR	-600.0000	2039	1936	0.0000	0.0000	-20.0000	-800.0000	-600.00
100955	Dillon, Matt	16	JLM Grossup PRSR	0.0000	2040	1937	-700.0000	0.0000	0.0000	0.0000	0.0000
100955	Dillon, Matt	16	JLM Grossup PRSR	0.0000	2041	1938	0.0000	0.0000	-133.2800	-1332.8400	-800.00
100955	Dillon, Matt	16	JLM Grossup PRSR	0.0000	2044	1939	0.0000	0.0000	-1083.2900	-10832.8700	-6500.00
100955	Dillon, Matt	16	JLM Grossup PRSR	600.0000	2039	1940	0.0000	0.0000	0.0000	840.0000	600.000
100955	Dillon,	16	JLM Grossup	0.0000	2040	1941	700.0000	0.0000	0.0000	0.0000	0.0000

Ex 7. Tax Assistance Wage Request

User Report Type Details

admin 6/16/2009 admin 6/16/2009

Inactive	☐
* Name	Tax Assistance Wage Request
Description	
Data sensitivity	**Please Select**
* Base table	Assignment
Available at Company Level	☑
* Company Path	Choose **Assignment -> Company**

Additional Data Sources Allowed

New

Delete	Data Source	Default
☐	TAX_ASSISTANCE_WAGE_REQUEST (view) Choose Path **Assignment -> TAX_ASSISTANCE_WAGE_REQUEST (view)**	☑
☐	TAXCALC_ASSIGNMENT Choose Path **Assignment -> TAXCALC_ASSIGNMENT**	☑

External User Type Access

New

Delete	External User Type Access

Save Delete Close

User Report Details - Tax Assistance Wage Request

admin 6/17/2009 admin 6/17/2009

Edit Details

Name	**Tax Assistance Wage Request**
Description	**Summarizes various Tax & Payroll details for assignees**
Report Type	**Tax Assistance Wage Request**
Report Timeout Seconds	**120**
Payroll Export	**No**

Payroll Output Type

External User Type Access

External User Type Access

Close

Data Fields

admin 6/17/2009 admin 6/17/2009

Edit Data Fields

Selected Data Fields

Hide	Sequence	Sort	Aggregate	Field	Column Caption
No	1			TAX_ASSISTANCE_WAGE_REQUEST (view): First Name	First Name
No	2			TAX_ASSISTANCE_WAGE_REQUEST (view): Last Name	Last Name
No	3			TAX_ASSISTANCE_WAGE_REQUEST (view): Departure Work State	Departure Work State
No	4			TAX_ASSISTANCE_WAGE_REQUEST (view): Departure Work State Annual Salary	Departure Work State Annual Salary
No	5			TAX_ASSISTANCE_WAGE_REQUEST (view): Departure Work State Salary Eff Date	Departure Work State Salary Eff Date
No	6			TAX_ASSISTANCE_WAGE_REQUEST (view): Destination Work State	Destination Work State
No	7			TAX_ASSISTANCE_WAGE_REQUEST (view): Destination Work State Annual Salary	Destination Work State Annual Salary
No	8			TAX_ASSISTANCE_WAGE_REQUEST (view): Destination Work State Salary Eff Date	Destination Work State Salary Eff Date
No	9			TAX_ASSISTANCE_WAGE_REQUEST (view): Employee Id	Employee Id
No	10			TAX_ASSISTANCE_WAGE_REQUEST (view): Expense Report Date	Expense Report Date
No	11			TAX_ASSISTANCE_WAGE_REQUEST (view): Federal Annual Salary	Federal Annual Salary
No	12			TAX_ASSISTANCE_WAGE_REQUEST (view): Federal Annual Salary Eff Date	Federal Annual Salary Eff Date
No	13			TAX_ASSISTANCE_WAGE_REQUEST (view): Medicare Ytd Wages	Medicare Ytd Wages
No	14			TAX_ASSISTANCE_WAGE_REQUEST (view): Medicare Ytd Wages Eff Date	Medicare Ytd Wages Eff Date
No	15			TAX_ASSISTANCE_WAGE_REQUEST (view): Oasdi Annual Salary	Oasdi Annual Salary
No	16			TAX_ASSISTANCE_WAGE_REQUEST (view): Oasdi Annual Salary Salary Eff Date	Oasdi Annual Salary Salary Eff Date
No	17			TAX_ASSISTANCE_WAGE_REQUEST (view): Tax Year	Tax Year

Filters

admin 6/17/2009 admin 6/17/2009

Edit Filters

Filters

Order	( )	Field	Comparison	Comparison Value	( )	And/Or	Prompt
1		TAX_ASSISTANCE_WAGE_REQUEST (view): Tax Year	Is Equal To	2009		And	Yes
2		TAX_ASSISTANCE_WAGE_REQUEST (view): Expense Report Date	Is Less Than	8/1/2009			Yes

Close

Run User Report - Windows Internet Explorer

First Name	Last Name	Departure Work State	Departure Work State Annual Salary	Departure Work State Salary Eff Date	Destination Work State	Destination Work State Annual Salary	Destination Work State Salary Eff Date	Employee Id	Expense Report Date	Federal Annual Salary	Federal Annual Salary Eff Date	Medicare Ytd Wages	Medicare Ytd Wages Eff Date	Oasdi Annual Salary	Oasdi Annual Salary Salary Eff Date	Tax Year
Johnny	Ramone		0.00			0.00		101102	6/30/2008	0.00	1/3/2008	0.00	1/2/2008	0.00	1/1/2008	2008
Iggy	Pop		0.00		CA	1200000.00		101115	6/30/2008	1200000.00		1200000.00		1200000.00		2008
Ron	Asheton		0.00		MI	80000.00		101116	2/29/2008	80000.00		80000.00		80000.00		2008
Scott	Asheton		0.00		MI	0.00		101117	3/31/2008	0.00		0.00		0.00		2008
Dave	Alexander		0.00		MI	100000.00		101118	1/31/2008	100000.00		120000.00		100000.00		2008
Fred	Smith		0.00		MI	40000.00		101121	7/31/2008	40000.00		40000.00		40000.00		2008
Wayne	Kramer		0.00		MA	0.00		101122	5/31/2008	0.00		80000.00		0.00		2008
Michael	Davis		0.00		NE	50000.00		101123	4/30/2008	50000.00		0.00		50000.00		2008
Syl	Sylvain		0.00		NY	65000.00		101127	3/31/2008	65000.00		30000.00		65000.00		2008
Warwick	Gilbert		0.00		NH	90000.00		101134	6/30/2008	90000.00		0.00		90000.00		2008
Pip	Hoyle		0.00		NV	350000.00		101138	7/31/2008	350000.00		0.00		350000.00		2008
Johnny	Thunders		0.00		NY	250000.00		101126	6/30/2008	250000.00		100000.00		250000.00		2008
David	Johannsen		0.00		NY	1000000.00		101125	6/30/2008	1000000.00		250000.00		1000000.00		2008

Ex 8. Account Sums with Formatting

An example of assignment expenses using account sums.

User Report Type Details

Chedrick 8/12/2008 Chedrick 8/29/2008

Inactive ☐

* Name: Expenses by Account Sum

Description: Expenses by Account Sum

Data sensitivity: **Please Select**

* Base table: Assignment

Available at Company Level ☑

* Company Path: Choose **Assignment -> Company**

Additional Data Sources Allowed

New

Delete	Data Source	Default
☐	Employee Choose Path **Assignment -> Employee**	☑
☐	Entry Expense Choose Path **Assignment -> Entry -> Entry Expense**	☑

External User Type Access

New

Delete	External User Type Access

Save Delete Close

Data | Formatting | Export Options

User Report Details - Assignment Expenses by Account Sum

Chedrick 8/29/2008 Chedrick 8/29/2008

Edit Details

Name: **Assignment Expenses by Account Sum**

Description: **Assignment Expenses by Account Sum**

Report Type: **Expenses by Account Sum**

Report Timeout Seconds: **120**

Payroll Export: **No**

Payroll Output Type

External User Type Access

External User Type Access

Close

Data Fields

Chedrick 8/29/2008 Chedrick 8/29/2008

Edit Data Fields

Selected Data Fields

Hide	Sequence	Sort	Aggregate	Field	Column Caption
No	1			Assignment: ID	ID
No	2			Assignment: Company	Company
Yes	3			Employee: First Name	First Name
Yes	4			Employee: Last Name	Last Name
No	5			<Calculated Field>	Assignee
		Formula: [Last Name] + ', ' + [First Name]			
No	6			<Account Sum>	Allowance Expenses in USD
		Account Sum: Allowance Expenses Currency: USD			
No	7			<Account Sum>	Rest and Relaxation in USD
		Account Sum: Rest and Relaxation Expenses Currency: USD			
No	8			<Account Sum>	Interview Expenses in CAD
		Account Sum: Interview Expenses Currency: CAD			
No	9			Entry Expense: Report Date	Expense Report Date

Filters

Chedrick 8/29/2008 Chedrick 8/29/2008

Field

Account Sum (CAD) - Interview Expenses in CAD
Account Sum (USD) - Allowance Expenses in USD
Account Sum (USD) - Rest and Relaxation in USD
Assignment (Custom Fields): Global Employee ID
Assignment (Custom Fields): Solomon Setup Indicator
Assignment: Accounting Coordinator
Assignment: Active for Billing
Assignment: Actual End Date
Assignment: Archive Date

Comparison

Is Equal To
Is Not Equal To
Like (use % as wildcard)
Is Less Than
Is Greater Than
Is Less Than Or Equal To
Is Greater Than Or Equal To
Is Blank
Is Not Blank

Comparison Value

Get Data Get Fields

Add Filter >>

Filters

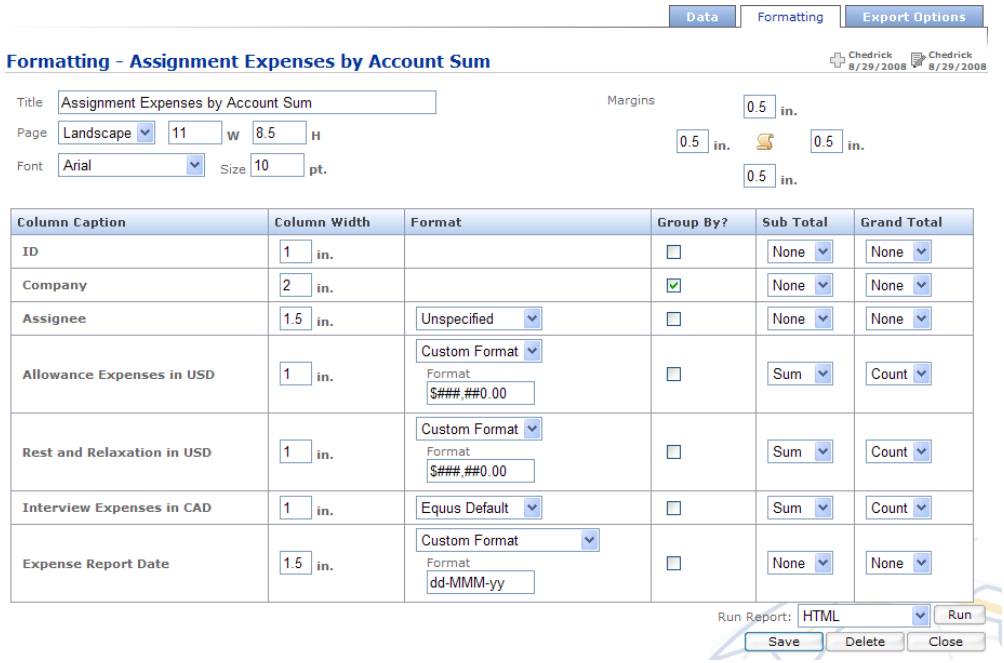
Delete	Order	( )	Field	Comparison	Comparison Value	( )	And/Or	Prompt
☐	1		Account Sum (CAD) - Interview Expenses in CAD	Is Greater Than	10		Or	☐
☐	2		Account Sum (USD) - Allowance Expenses in USD	Is Greater Than	10		Or	☐
☐	3		Account Sum (USD) - Rest and Relaxation in USD	Is Greater Than	10		-	☐

Run Report: PDF Run

Save Delete Close

Close

Formatting Options



Once the user selects any option from the Run Report drop-down list, the system will prompt the user for each of the filters designated for prompting:

Run User Report - Windows Internet Explorer

User Report

Report **Assignment Expenses by Account Sum**

Description **Assignment Expenses by Account Sum**

Parameters

Allowance Expenses in USD Parameters

From Tax Year	**Is Greater Than Or Equal To**	2007
To Tax Year	**Is Less Than Or Equal To**	2008
Paid To	**Is Equal To**	<ALL>
Payor	**Is Equal To**	<ALL>
From Report Date	**Is Greater Than Or Equal To**	01/01/2008
To Report Date	**Is Less Than Or Equal To**	08/31/2008

Interview Expenses in CAD Parameters

From Tax Year	**Is Greater Than Or Equal To**	2007
To Tax Year	**Is Less Than Or Equal To**	2008

Rest and Relaxation in USD Parameters

Paid To	**Is Equal To**	Employee
Policy Standing	**Is Equal To**	Not Denied
From Expense Date	**Is Greater Than Or Equal To**	01/01/2007
To Expense Date	**Is Less Than Or Equal To**	08/31/2008

Run Report

Click the Run Report link to generate report. This is an example of a PDF formatted report.

Assignment Expenses by Account Sum

ID	Company	Assignee	Allowance Expenses in USD	Rest and Relaxation in USD	Interview Expenses in CAD	Expense Report Date
101040	TMR Inc.	Brett, George			600.00	31-Aug-08
101040	TMR Inc.	Brett, George			600.00	27-Aug-08
101040	TMR Inc.	Brett, George			600.00	31-Aug-08
		Sub Totals:			1,800.00	
101107	QA Testing Company	Brown, Brian	$1,500.00			19-May-08
		Sub Totals:	$1,500.00			
101114	World Wide Relocations and Assignments	Smith, Sara		$2,300.00	0.00	29-Aug-08
101114	World Wide Relocations and Assignments	Smith, Sara		$2,300.00	0.00	29-Aug-08
101114	World Wide Relocations and Assignments	Smith, Sara		$2,300.00	0.00	29-Aug-08
101114	World Wide Relocations and Assignments	Smith, Sara		$2,300.00	0.00	29-Aug-08
101116	World Wide Relocations and Assignments	Brant, Jon			276.25	29-Aug-08
101116	World Wide Relocations and Assignments	Brant, Jon			276.25	29-Aug-08
101116	World Wide Relocations and Assignments	Brant, Jon			276.25	29-Aug-08
101116	World Wide Relocations and Assignments	Brant, Jon			276.25	29-Aug-08
101110	World Wide Relocations and Assignments	Arnold, Kevin	$20,000.00			11-Mar-08
		Sub Totals:	$20,000.00	$9,200.00	1,105.00	

Ex 9. Hyperlink example - Assignment Compensation Audit

This report has several functions including giving a user a one-stop shop for assignments configuration across a company, company segment, policy or payroll system.

Calculated fields are utilized in this user report to create hyperlinks to **View/Edit** an existing record or to add a new record (**Add New**). With the use of these hyperlinks, a user can more efficiently add and update assignment information.

The "Compensation Worksheet (CW) Template Exists?" column is a calculated field using the "immediate if function" (iif). This allows the report to show a **View/Edit** link if a template exists and an **Add New** link if a template does not exist.

Run User Report - Windows Internet Explorer

https://assignmentpro.equusoft.com/AssignmentProDemoNew/Main/Report/UserReport_Run.aspx?UserReportID=72

Company	Last Name	First Name	Edit Assignment Info	Relocation Effective Date	CW Template Exists?	Assignment System #	Primary Payroll System	Secondary Payroll System	Salary Information	Home/Host Family Size
Green Corp	Caither	Katherine	View/Edit	6/3/2005 12:00:00 AM	View/Edit	2148	Green Corporate Payroll		240000.0000 USD	3/3
Green Corp	Ed	Eckler	View/Edit		Add New	2191			Add New	?/?
Green Corp	Guy	Some	View/Edit		Add New	2176	Green Corporate Payroll		Add New	?/?
Green Corp	Henderson	Harry	View/Edit	11/1/2007 12:00:00 AM	Add New	2189			Add New	?/?
Green Corp	Johnson	Jeff	View/Edit	9/30/2008 12:00:00 AM	Add New	2210			Add New	?/?
Green Corp	Johnson	Larry	View/Edit	12/31/2010 12:00:00 AM	Add New	2206	US Monthly Payroll	US Monthly Payroll	Add New	?/?
Green Corp	Jones	Bob	View/Edit		Add New	2205			Add New	?/?
Green Corp	Jones	Jim	View/Edit		Add New	2201			Add New	?/?
Green Corp	Jones	Katherine	View/Edit		Add New	2173			Add New	?/?
Green Corp	Jones	Larry	View/Edit		Add New	2178			Add New	?/?
Green Corp	Melvin	Bob	View/Edit		View/Edit	2195	US Monthly Payroll	UK Payroll	200000.0000 USD	4/4

Internet 100%

Note: The hyperlink functionality is available ONLY in the HTML and EXCEL Data export options.

The directions for creating this report are listed below:

User Report Type Details

jacob.johnson 9/25/2013 | jacob.johnson 9/25/2013

Inactive	☐
* Name	Employee/Assignment
Description	
Report Authorship Data Sensitivity	**Please Select**
* Base table	Assignment
Available at Company Level	☐
* Company Path	Choose

Additional Data Sources Allowed

New

Delete	Data Source	Default
☐	ASSIGNMENT COMP & PAYF Choose Path Assignment -> ASSIGNMENT COMP & PAYROLL INFO	☐
☐	Employee Choose Path Assignment -> Employee	☐
☐	Comp Worksheet Assignmen Choose Path Assignment -> Comp Worksheet Assignment Template	☐

Selected Data Fields Sort Default Asc.

Hide	Sequence	Sort	Aggregate	Field	Column Caption
No	1			Employee: Company	Company
No	2			Employee: First Name	First Name
No	3			Employee: ID	ID
No	4			Employee: Last Name	Last Name
No	5			<Custom Calc Field>	Edit Assignment Info
		Formula:	'View/Edit'		
No	6			Assignment: Relocation Effective Date	Relocation Effective Date
No	7			<Custom Calc Field>	CW Template Exists?
		Formula:	iif([CWTemplateID] is NULL, 'Add New', 'View/Edit')		
No	8			Assignment: Relocation System Number	Relocation System Number
No	9			ASSIGNMENT COMP & PAYROLL INFO: Asgn Primary Payroll System	Asgn Primary Payroll System
No	10			ASSIGNMENT COMP & PAYROLL INFO: Asgn Secondary Payroll System	Asgn Secondary Payroll System
No	11			ASSIGNMENT COMP & PAYROLL INFO: Current Annual Base Pay Amount	Current Annual Base Pay Amount
No	12			ASSIGNMENT COMP & PAYROLL INFO: Current Annual Base Pay Currency	Current Annual Base Pay Currency
No	13			ASSIGNMENT COMP & PAYROLL INFO: Current Home Family Size	Current Home Family Size
No	14			ASSIGNMENT COMP & PAYROLL INFO: Current Host Family Size	Current Host Family Size
No	15			Assignment: ID	ID
No	16			<Custom Calc Field>	Salary Information
		Formula:	iif([Base Pay Amount]>0, [Base Pay Amount], 'Add New') + ' ' + iif([Base Pay Currency] is not null,[Base Pay Currency], '?')		
No	17			Comp Worksheet Assignment Template: ID	ID
No	18			<Custom Calc Field>	Home/Host family Size
		Formula:	iif([Home Family Size] is not null, [Home Family Size], '?') + '/' +iif([Host Family Size] is not null, [Host Family Size], '?')		

Filters jacob.johnson 9/25/2013 jacob.johnson 9/25/2013

Edit Filters

Filters Sort Default Asc.

Order	( )	Field	Comparison	Comparison Value	( )	And/Or	Prompt
1		Employee: Company	Is Equal To	Green			No

Details for the calculated fields show on the previous page are as follows:

"Edit Assignment Info":

'<a href="../Assignment/Assignment.aspx?EmployeeID=' + [EmployeeID] + '&AssignmentID=' + [AssignmentID] + '"Target="New">View/Edit</a>'

“CW Template Exists?”:

```
iif([CWTemplateID] is NULL, '<a
href="../../CompWorksheet/CompensationWorksheet/CompensationWorksheet_List.aspx?AssignmentID=' +
[AssignmentID] + '"Target="New">Add New</a>', '<a
href="../../CompWorksheet/CompensationWorksheet/AssignmentCWTemplate.aspx?AssignmentID=' +
[AssignmentID] + '&CompWorksheetAssignmentTemplateID=' + [CWTemplateID] +
'"Target="New">View/Edit</a>')
```

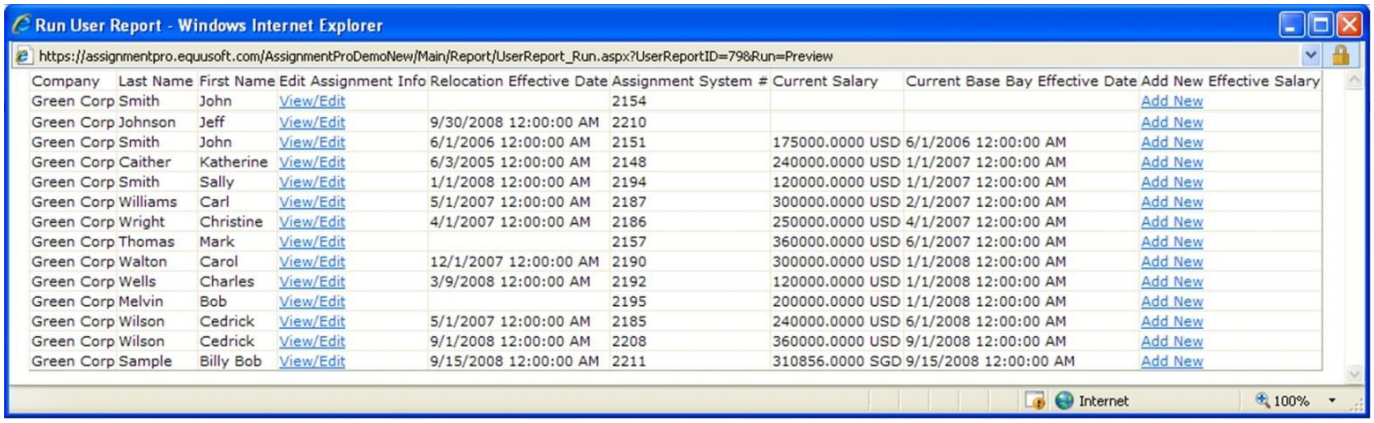
“Salary Information”:

```
iif([Base Pay Amount] > 0, [Base Pay Amount], '<a
href="../AssignmentCompensation/AssignmentCompensation.aspx?AssignmentID=' + [AssignmentID] +
'&AssignmentCompensationSalaryID=0' + '"Target="New">Add New</a>') + ' ' + iif([Base Pay Currency] is not
null,[Base Pay Currency],'')
```

No additional formatting or export options are required for this report.

Ex 10. Client Salary Update

This user report allows a user to quickly add new effective salaries to a population of assignees.



Run User Report - Windows Internet Explorer

https://assignmentpro.equusoft.com/AssignmentProDemoNew/Main/Report/UserReport_Run.aspx?UserReportID=79&Run=Preview

Company	Last Name	First Name	Edit Assignment Info	Relocation Effective Date	Assignment System #	Current Salary	Current Base Bay Effective Date	Add New Effective Salary
Green Corp	Smith	John	View/Edit		2154			Add New
Green Corp	Johnson	Jeff	View/Edit	9/30/2008 12:00:00 AM	2210			Add New
Green Corp	Smith	John	View/Edit	6/1/2006 12:00:00 AM	2151	175000.0000 USD	6/1/2006 12:00:00 AM	Add New
Green Corp	Caither	Katherine	View/Edit	6/3/2005 12:00:00 AM	2148	240000.0000 USD	1/1/2007 12:00:00 AM	Add New
Green Corp	Smith	Sally	View/Edit	1/1/2008 12:00:00 AM	2194	120000.0000 USD	1/1/2007 12:00:00 AM	Add New
Green Corp	Williams	Carl	View/Edit	5/1/2007 12:00:00 AM	2187	300000.0000 USD	2/1/2007 12:00:00 AM	Add New
Green Corp	Wright	Christine	View/Edit	4/1/2007 12:00:00 AM	2186	250000.0000 USD	4/1/2007 12:00:00 AM	Add New
Green Corp	Thomas	Mark	View/Edit		2157	360000.0000 USD	6/1/2007 12:00:00 AM	Add New
Green Corp	Walton	Carol	View/Edit	12/1/2007 12:00:00 AM	2190	300000.0000 USD	1/1/2008 12:00:00 AM	Add New
Green Corp	Wells	Charles	View/Edit	3/9/2008 12:00:00 AM	2192	120000.0000 USD	1/1/2008 12:00:00 AM	Add New
Green Corp	Melvin	Bob	View/Edit		2195	200000.0000 USD	1/1/2008 12:00:00 AM	Add New
Green Corp	Wilson	Cedrick	View/Edit	5/1/2007 12:00:00 AM	2185	240000.0000 USD	6/1/2008 12:00:00 AM	Add New
Green Corp	Wilson	Cedrick	View/Edit	9/1/2008 12:00:00 AM	2208	360000.0000 USD	9/1/2008 12:00:00 AM	Add New
Green Corp	Sample	Billy Bob	View/Edit	9/15/2008 12:00:00 AM	2211	310856.0000 SGD	9/15/2008 12:00:00 AM	Add New

Internet 100%

The directions for creating this report are listed below:

User Report Type Details

jacob.johnson 9/25/2013 | jacob.johnson 9/25/2013

Inactive	☐
* Name	Employee/Assignment
Description	
Report Authorship Data Sensitivity	**Please Select**
* Base table	Assignment
Available at Company Level	☐
* Company Path	Choose

Additional Data Sources Allowed

New

Delete	Data Source	Default
☐	ASSIGNMENT COMP & PAYI Choose Path Assignment -> ASSIGNMENT COMP & PAYROLL INFO	☐
☐	Employee Choose Path Assignment -> Employee	☐
☐	Comp Worksheet Assignmen Choose Path Assignment -> Comp Worksheet Assignment Template	☐

Selected Data Fields Sort Default Asc.

Hide	Sequence	Sort	Aggregate	Field	Column Caption
No	1			Employee: Company	Company
No	2			Employee: First Name	First Name
No	3			Employee: ID	ID
No	4			Employee: Last Name	Last Name
No	5			<Custom Calc Field>	Edit Assignment Info
		Formula:	'View/Edit'		
No	6			Assignment: Relocation Effective Date	Relocation Effective Date
No	7			<Custom Calc Field>	CW Template Exists?
		Formula:	iif([CWTemplateID] is NULL, 'Add New', 'View/Edit')		
No	8			Assignment: Relocation System Number	Relocation System Number
No	9			ASSIGNMENT COMP & PAYROLL INFO: Asgn Primary Payroll System	Asgn Primary Payroll System
No	10			ASSIGNMENT COMP & PAYROLL INFO: Asgn Secondary Payroll System	Asgn Secondary Payroll System
No	11			ASSIGNMENT COMP & PAYROLL INFO: Current Annual Base Pay Amount	Current Annual Base Pay Amount
No	12			ASSIGNMENT COMP & PAYROLL INFO: Current Annual Base Pay Currency	Current Annual Base Pay Currency
No	13			ASSIGNMENT COMP & PAYROLL INFO: Current Home Family Size	Current Home Family Size
No	14			ASSIGNMENT COMP & PAYROLL INFO: Current Host Family Size	Current Host Family Size
No	15			Assignment: ID	ID
No	16			<Custom Calc Field>	Salary Information
		Formula:	iif([Base Pay Amount]>0, [Base Pay Amount], 'Add New') + ' ' + iif([Base Pay Currency] is not null,[Base Pay Currency], '?')		
No	17			Comp Worksheet Assignment Template: ID	ID
No	18			<Custom Calc Field>	Home/Host family Size
		Formula:	iif([Home Family Size] is not null, [Home Family Size], '?') + '/' +iif([Host Family Size] is not null, [Host Family Size], '?')		

Filters jacob.johnson 9/25/2013 jacob.johnson 9/25/2013

Edit Filters

Filters Sort Default Asc.

Order	( )	Field	Comparison	Comparison Value	( )	And/Or	Prompt
1		Employee: Company	Is Equal To	Green			No

Details for the calculated fields show on the previous page are as follows:

"Edit Assignment Info":

'<a href="../Assignment/Assignment.aspx?EmployeeID=' + [EmployeeID] + '&AssignmentID=' + [AssignmentID] + '"Target="New">View/Edit</a>'

“Add New Effective Salary”:

```
'<a href="../AssignmentCompensation/AssignmentCompensation.aspx?AssignmentID=' + [AssignmentID] +
'&AssignmentCompensationSalaryID=0' + '"Target="New">Add New</a>'
```

Ex 11. Global Statement of Earnings (multiple assignment)

The standard Global Statement of Earnings (GSOE) report runs by assignment. The example below runs across assignments for an employee. Additionally, this report demonstrates how to sum amounts in a calculated field.

1st QTR 2008 - Global Statement of Earnings (USD)

Company	First Name	Last Name	Number	Payroll System	Account Id	January	February	March	First QTR Total	YTD Total	Currency
Green Corp	Cedrick	Wilson	2287	US Monthly	401k	(1,000.01)	0.00	0.00	(1,000.01)	(1,000.01)	USD
Green Corp	Cedrick	Wilson	2287	US Monthly	401k	0.00	(1,000.01)	0.00	(1,000.01)	(1,000.01)	USD
Green Corp	Cedrick	Wilson	2287	US Monthly	401k	0.00	0.00	(1,000.01)	(1,000.01)	(1,000.01)	USD
	Sub Totals:	Wilson			401k	(1,000.01)	(1,000.01)	(1,000.01)	(3,000.03)	(3,000.03)	
Green Corp	Cedrick	Wilson	2287	US Monthly	Base Salary	12,000.00	0.00	0.00	12,000.00	12,000.00	USD
Green Corp	Cedrick	Wilson	2287	US Monthly	Base Salary	0.00	12,000.00	0.00	12,000.00	12,000.00	USD
Green Corp	Cedrick	Wilson	2287	US Monthly	Base Salary	0.00	0.00	12,000.00	12,000.00	12,000.00	USD
	Sub Totals:	Wilson			Base Salary	12,000.00	12,000.00	12,000.00	36,000.00	36,000.00	
Green Corp	Cedrick	Wilson	2287	US Monthly	Children School Tuition	5,000.00	0.00	0.00	5,000.00	5,000.00	USD
	Sub Totals:	Wilson			Children School Tuition	5,000.00	0.00	0.00	5,000.00	5,000.00	
Green Corp	Cedrick	Wilson	2287	US Monthly	Danger Pay	1,000.00	0.00	0.00	1,000.00	1,000.00	USD
Green Corp	Cedrick	Wilson	2287	US Monthly	Danger Pay	0.00	1,000.00	0.00	1,000.00	1,000.00	USD
Green Corp	Cedrick	Wilson	2287	US Monthly	Danger Pay	0.00	0.00	1,000.00	1,000.00	1,000.00	USD
	Sub Totals:	Wilson			Danger Pay	1,000.00	1,000.00	1,000.00	3,000.00	3,000.00	
Green Corp	Cedrick	Wilson	2287	US Monthly	Emergency Leave - Airfare	1,900.00	0.00	0.00	1,900.00	1,900.00	USD
	Sub Totals:	Wilson			Emergency Leave - Airfare	1,900.00	0.00	0.00	1,900.00	1,900.00	
Green Corp	Cedrick	Wilson	2287	US Monthly	Emergency Leave - Lodging	850.55	0.00	0.00	850.55	850.55	USD
	Sub Totals:	Wilson			Emergency Leave - Lodging	850.55	0.00	0.00	850.55	850.55	
Green Corp	Cedrick	Wilson	2287	US Monthly	Emergency Leave - other expenses	120.00	0.00	0.00	120.00	120.00	USD
	Sub Totals:	Wilson			Emergency Leave - other expenses	120.00	0.00	0.00	120.00	120.00	
Green Corp	Cedrick	Wilson	2287	US Monthly	Goods and Services Differential	1,200.00	0.00	0.00	1,200.00	1,200.00	USD
Green Corp	Cedrick	Wilson	2287	US Monthly	Goods and Services Differential	0.00	1,200.00	0.00	1,200.00	1,200.00	USD
Green Corp	Cedrick	Wilson	2287	US Monthly	Goods and Services Differential	0.00	0.00	1,200.00	1,200.00	1,200.00	USD
	Sub Totals:	Wilson			Goods and Services Differential	1,200.00	1,200.00	1,200.00	3,600.00	3,600.00	
Green Corp	Cedrick	Wilson	2287	US Monthly	Host Fed Social Taxes Paid_Employee	(550.00)	0.00	0.00	(550.00)	(550.00)	USD
Green Corp	Cedrick	Wilson	2287	US Monthly	Host Fed Social Taxes Paid_Employee	0.00	(550.00)	0.00	(550.00)	(550.00)	USD
Green Corp	Cedrick	Wilson	2287	US Monthly	Host Fed Social Taxes Paid_Employee	0.00	0.00	(550.00)	(550.00)	(550.00)	USD
	Sub Totals:	Wilson			Host Fed Social Taxes Paid_Employee	(550.00)	(550.00)	(550.00)	(1,650.00)	(1,650.00)	
Green Corp	Cedrick	Wilson	2287	US Monthly	Host Utility Expense	250.00	0.00	0.00	250.00	250.00	USD
Green Corp	Cedrick	Wilson	2287	US Monthly	Host Utility Expense	0.00	250.00	0.00	250.00	250.00	USD
Green Corp	Cedrick	Wilson	2287	US Monthly	Host Utility Expense	0.00	0.00	250.00	250.00	250.00	USD
	Sub Totals:	Wilson			Host Utility Expense	250.00	250.00	250.00	750.00	750.00	
Green Corp	Cedrick	Wilson	2287	US Monthly	Hypo Tax - Federal	(2,200.00)	0.00	0.00	(2,200.00)	(2,200.00)	USD
Green Corp	Cedrick	Wilson	2287	US Monthly	Hypo Tax - Federal	0.00	(2,200.00)	0.00	(2,200.00)	(2,200.00)	USD
Green Corp	Cedrick	Wilson	2287	US Monthly	Hypo Tax - Federal	0.00	0.00	(2,200.00)	(2,200.00)	(2,200.00)	USD
	Sub Totals:	Wilson			Hypo Tax - Federal	(2,200.00)	(2,200.00)	(2,200.00)	(6,600.00)	(6,600.00)	
Green Corp	Cedrick	Wilson	2287	US Monthly	Transportation Allowance	200.00	0.00	0.00	200.00	200.00	USD
Green Corp	Cedrick	Wilson	2287	US Monthly	Transportation Allowance	0.00	200.00	0.00	200.00	200.00	USD
Green Corp	Cedrick	Wilson	2287	US Monthly	Transportation Allowance	0.00	0.00	200.00	200.00	200.00	USD
	Sub Totals:	Wilson			Transportation Allowance	200.00	200.00	200.00	600.00	600.00	
					Grand Totals:	18,770.54	10,899.99	10,899.99	40,570.52	40,570.52	

This report utilizes the CONVERT function to sum decimal amounts.

Data | Formatting | Export Options

User Report Details - Global Statement of Earnings (monthly buckets)

Admin 9/25/2008 Admin 9/25/2008

Edit Details

Name	Global Statement of Earnings (monthly buckets)
Description	
Report Type	Pay Register Data by Employee
Report Timeout Seconds	120
Payroll Export	No

Payroll Output Type

External User Type Access

External User Type Access

Close

Data Fields

Admin 9/25/2008 Admin 9/25/2008

Edit Data Fields

Selected Data Fields

Hide	Sequence	Sort	Aggregate	Field	Column Caption
No	1			Employee: Company	Company
No	2			Employee: First Name	First Name
No	3	Asc		Employee: Last Name	Last Name
Yes	4		Sum	Pay Register Line: Primary Amount	PrimaryAmount
Yes	5			Pay Register: Pay Date	PayDate
No	6			Employee: ID	Number
No	7			ASSIGNMENT COMP & PAYROLL INFO: Asgn Primary Payroll System External Name	Payroll System
No	8	Asc		Pay Register Line: Account Id	Account Id
No	9			<Calculated Field>	January
		Formula: CONVERT(iif([PayDate] >= #1/1/08# and [PayDate] <= #1/31/08#,[PrimaryAmount],0),'System.Decimal')			
No	10			<Calculated Field>	February
		Formula: CONVERT(iif([PayDate] >= #2/1/08# and [PayDate] <= #2/29/08#,[PrimaryAmount],0),'System.Decimal')			
No	11			<Calculated Field>	March
		Formula: CONVERT(iif([PayDate] >= #3/1/08# and [PayDate] <= #3/31/08#,[PrimaryAmount],0),'System.Decimal')			
No	12			<Calculated Field>	First QTR Total
		Formula: CONVERT(iif([PayDate] >= #1/1/08# and [PayDate] <= #3/31/08#,[PrimaryAmount],0),'System.Decimal')			
No	13			<Calculated Field>	YTD Total
		Formula: CONVERT(iif([PayDate] >= #1/1/08# and [PayDate] <= #12/31/08#, [PrimaryAmount],0),'System.Decimal')			
No	14			Pay Register Line: Primary Currency	Currency

Filters

Admin 9/25/2008 Admin 9/25/2008

Edit Filters

Filters

Order	( )	Field	Comparison	Comparison Value	( )	And/Or	Prompt
2		Pay Register Line: Primary Amount	Is Not Equal To	.00		And	No
5		Pay Register: Pay Date	Is Greater Than Or Equal To	1/1/2008		And	Yes
6		Pay Register: Pay Date	Is Less Than Or Equal To	3/31/2008			Yes

Note: This report may require the Pay Register Line: Company Amount field to do cross assignment reporting.

The formatting for this report includes an example of the “First” Sub Total option. This option displays the field value in the Sub Total row as seen on the example on the previous page.

The following user report type was used to build this report:

User Report Type Details

Admin 9/3/2008 | Admin 9/3/200

Inactive	☐
* Name	Pay Register Data by Employee
Description	
Data sensitivity	**Please Select**
* Base table	Pay Register
Available at Company Level	☐
Company Path	Choose

Additional Data Sources Allowed

New

Delete	Data Source	Default
☐	Assignment Choose Path Pay Register -> Assignment	☑
☐	Employee Choose Path Pay Register -> Assignment -> Employee	☑
☐	Pay Register Line Choose Path Pay Register -> Pay Register Line	☑
☐	ASSIGNMENT COMP & PAYROLL INFO Choose Path Pay Register -> Assignment -> ASSIGNMENT COMP & PAYROLL INFO	☑

Ex 12. Overdue Service Orders (mailto example)

This report shows all service orders without a complete date that have a service due date in the past. The **View/Edit** link will take you to the service order in question. The **Contact Vendor** link will generate a pre-populated email to the Vendor Contact.

Run User Report - Windows Internet Explorer

https://assignmentpro.equusoft.com/AssignmentProDemoNew/Main/Report/UserReport_Run.aspx?UserReportID=81

Company	Vendor Contact	Last Name	First Name	Service Order Number	Service Order Type	View/Edit Service Order	Service Due Date	Status	Service Order Coordinator	Vendor	Notify Vendor of Overdue Service
Green Corp	Amy Hart	Smith	John	206	Visa Service	View/Edit	8/30/2008 12:00:00 AM	Not Ordered	MThomas	Consular Connection	Contact Vendor
Green Corp	PREF: John Smith	Thomas	Howard	250	Moving	View/Edit	9/11/2008 12:00:00 AM	Ordered	MThomas	Bruin Lee Moving Company	Contact Vendor
Green Corp	Mark Thomas	Caither	Katherine	191	Realtor	View/Edit	9/15/2008 12:00:00 AM	Payment Made	MThomas	Costa Mesa Real Estate	Contact Vendor
Green Corp	PREF: Lucille Smith	Caither	Katherine	187	Moving	View/Edit	9/20/2008 12:00:00 AM	Payment Made	MThomas	Acme Van Lines	Contact Vendor
Green Corp	Mark Thomas	Caither	Katherine	193	Area Orientation	View/Edit	9/24/2008 12:00:00 AM	Ordered	MThomas	Cultural Trainers Inc.	Contact Vendor
Magenta	Antonio Palmeri	Smith	Rick	207	Appliance Rental	View/Edit	9/27/2008 12:00:00 AM	Not Ordered	Tyler Reynolds	Agenzia Immobiliare	Contact Vendor

Internet 100%

Here is an example of what the pre-populated email might look like.

Please respond to overdue service order number 206 - Message

File Edit View Insert Format Tools Table Window Help Type a question for help

Options... HTML

To... ahart@equusoft.com

Cc...

Subject: Please respond to overdue service order number 206

Arial 10

Hello Amy Hart, Please call me as soon as possible at 303-555-1212 regarding service order number 206.
Sincerely, Tyler Reynolds, ABC Corp

Data | Formatting | Export Options

User Report Details - Overdue Service Orders

Admin 9/28/2008 Admin 9/28/2008

Edit Details

Name	Overdue Service Orders
Description	
Report Type	Services
Report Timeout Seconds	120
Payroll Export	No

Payroll Output Type

External User Type Access

External User Type Access

Close

Data Fields

Admin 9/28/2008 Admin 9/28/2008

Edit Data Fields

Selected Data Fields

Hide	Sequence	Sort	Aggregate	Field	Column Caption
No	1			Employee: Company	Company
No	2			Service Order: Vendor Contact	Vendor Contact
No	3			Employee: Last Name	Last Name
No	4			Employee: First Name	First Name
No	5			Service Order: ID	Service Order Number
Yes	6			Assignment: ID	AssignmentID
No	7			Service Order: Service Order Type	Service Order Type
No	8			<Calculated Field>	View/Edit Service Order
		Formula: 'View/Edit'			
No	9	Asc		Service Order: Service Due Date	Service Due Date
No	10			Service Order: Status	Status
No	11			Service Order: Service Order Coordinator	Service Order Coordinator
Yes	12			Vendor Contact: First Name	VC First Name
No	13			Service Order: Vendor	Vendor
Yes	14			Vendor Contact: Last Name	VC Last Name
Yes	15			Vendor Contact: Email	Vendor Contact Email
No	16			<Calculated Field>	Notify Vendor of Overdue Service
		Formula: 'Contact Vendor'			

Filters

Admin 9/28/2008 Admin 9/28/2008

Edit Filters

Filters

Order	( )	Field	Comparison	Comparison Value	( )	And/Or	Prompt
1		Service Order: Service Due Date	Is Less Than	10/1/2008		And	Yes
2		Service Order: Service Complete Date	Is Blank				No

The calculated field formulas used in this user report are as follows:

"View/Edit Service Order"

'<a href="../../ServiceOrder/ServiceOrder/ServiceOrderDetail.aspx?AssignmentID=' + [AssignmentID] + '&ServiceOrderID=' + [Service Order Number] + '"Target="New">View/Edit</a>'

"Notify Vendor of Overdue Service"

'<a href="mailto:' + [Vendor Contact Email] + '?subject=Please respond to overdue service order number ' + [Service Order Number] + '&body=Hello ' + [VC First Name] + ' ' + [VC Last Name] + ', Please call me as soon as possible at 303-555-1212 regarding service order number ' + [Service Order Number] + '. Sincerely, Tyler Reynolds, ABC Corp">Contact Vendor</a>'

The following user report type was used to build this report:

User Report Type Details

Admin 9/26/2008 | Admin 9/26/2008

Inactive	☐
* Name	Services
Description	
Data sensitivity	**Please Select**
* Base table	Assignment
Available at Company Level	☑
* Company Path	Choose Assignment -> Company

Additional Data Sources Allowed

New

Delete	Data Source	Default
☐	Service Order Choose Path Assignment -> Service Order	☑
☐	Employee Choose Path Assignment -> Employee	☑
☐	Vendor Contact Choose Path Assignment -> Service Order -> Vendor Contact	☑

Ex 13. Unapproved Pay Register Currency True Up

This report shows currency true up amounts based on the Primary Payroll Currency. The exchange rates in this example are determined by the Exchange Rate date on the Payroll System.

Data | Formatting | Export Options

User Report Details - Pay Register Currency True Up

Chedrick 7/31/2008 | Chedrick 10/9/2008

Edit Details

Name	Pay Register Currency True Up
Description	Pay Register Currency True Up
Report Type	Currency True-Up (Pay Register)
Report Timeout Seconds	120
Payroll Export	No

Payroll Output Type

External User Type Access

External User Type Access

Close

Data Fields

Chedrick 7/31/2008 Chedrick 10/9/2008

Edit Data Fields

Selected Data Fields

Hide	Sequence	Sort	Aggregate	Field	Column Caption
No	1			Assignment: ID	ID
Yes	2			Employee: First Name	First Name
Yes	3			Employee: Last Name	Last Name
No	4			<Calculated Field>	Assignee
		Formula: [First Name] + ' ' + [Last Name]			
Yes	5			Assignment: From City	From City
Yes	6			Assignment: From Country	From Country
No	7			<Calculated Field>	Home City, Country
		Formula: [From City] + ', ' + [From Country]			
No	8			Assignment: From Currency	Home Currency
Yes	9			Assignment: To City	To City
Yes	10			Assignment: To Country	To Country
No	11			<Calculated Field>	Host City, Country
		Formula: [To City] + ', ' + [To Country]			
No	12			Assignment: To Currency	Host Currency
No	13			Pay Register Line: Primary Wage Code	Primary Wage Code
No	14			Pay Register Line: Primary Currency	Primary Currency
Yes	15			Pay Register Line: Primary To System Exchange Rate	Primary To System Exchange Rate
Yes	16			Pay Register Line: Primary To System Exchange Rate Date	Primary To System Exchange Rate Date
No	17			<Calculated Field>	Primary to System XR and Date
		Formula: [Primary To System Exchange Rate] + ' ' + [Primary to System Exchange Rate Date]			
Yes	18			Pay Register Line: System Amount	Sys Amount
Yes	19			Pay Register Line: System Currency	System Currency
No	20			<Calculated Field>	System Amount
		Formula: [Sys Amount] + ' ' + [System Currency]			
Yes	21			Pay Register Line: Primary To Company Exchange Rate	Primary To Company Exchange Rate
Yes	22			Pay Register Line: Primary To Company Exchange Rate Date	Primary To Company Exchange Rate Date
No	23			<Calculated Field>	Primary to Company XR and Date
		Formula: [Primary To Company Exchange Rate] + ' ' + [Primary to Company Exchange Rate Date]			
Yes	24			Pay Register Line: Company Amount	Co Amount
Yes	25			Pay Register Line: Company Currency	Company Currency
No	26			<Calculated Field>	Company Amount
		Formula: [Co Amount] + ' ' + [Company Currency]			
Yes	27			Pay Register Line: Primary To Home Exchange Rate	Primary To Home Exchange Rate

Yes	28			Pay Register Line: Primary To Home Exchange Rate Date	Primary To Home Exchange Rate Date
No	29			<Calculated Field>	Primary to Home XR and Date
		Formula: [Primary To Home Exchange Rate] + ' ' + [Primary to Home Exchange Rate Date]			
Yes	30			Pay Register Line: Home Amount	Home Amount1
Yes	31			Pay Register Line: Home Currency	Home Currency
No	32			<Calculated Field>	Home Amount
		Formula: [Home Amount1] + ' ' + [Home Currency]			
Yes	33			Pay Register Line: Primary To Host Exchange Rate	Primary To Host Exchange Rate
Yes	34			Pay Register Line: Primary To Host Exchange Rate Date	Primary To Host Exchange Rate Date
No	35			<Calculated Field>	Primary to Host XR and Date
		Formula: [Primary To Host Exchange Rate] + ' ' + [Primary to Host Exchange Rate Date]			
Yes	36			Pay Register Line: Host Amount	Host Amount1
Yes	37			Pay Register Line: Host Currency	Host Currency
No	38			<Calculated Field>	Host Amount
		Formula: [Host Amount1] + ' ' + [Host Currency]			

The Calculations for this report are as follows:

Assignee

- [First Name] + ' ' + [Last Name]

Home City, Country

- [From City] + ', ' + [From Country]

To City, Country

- [To City] + ', ' + [To Country]

Primary to System Exchange Rate and Exchange Rate Date

- [Primary To System Exchange Rate] + ' ' + [Primary to System Exchange Rate Date]

System Amount

- [Sys Amount] + ' ' + [System Currency]

Primary to Company Exchange Rate and Exchange Rate Date

- [Primary To Company Exchange Rate] + ' ' + [Primary to Company Exchange Rate Date]

Company Amount

- [Co Amount] + ' ' + [Company Currency]

Primary to Home Exchange Rate and Exchange Rate Date

- [Primary To Home Exchange Rate] + ' ' + [Primary to Home Exchange Rate Date]

Home Amount

- [Home Amount1] + ' ' + [Home Currency]

Primary to Host Exchange Rate and Exchange Rate Date

- [Primary To Host Exchange Rate] + ' ' + [Primary to Host Exchange Rate Date]

Host Amount

- [Host Amount1] + ' ' + [Host Currency]

The following Formatting options were used:

Data | Formatting | Export Options

Formatting - Pay Register Currency True Up

Chedrick 7/31/2008 | Chedrick 10/9/2008

Title: Imported Pay Register Currency True-up

Page: Landscape 11 W 8.5 H

Font: Arial Size 10 pt.

Margins: 0.5 in. | 0.5 in. | 0.5 in. | 0.5 in.

Column Caption	Column Width	Format	Group By?	Sub Total	Grand Total
ID	1 in.		☐	None	None
Assignee	1.5 in.	Unspecified	☐	None	None
Home City, Country	1.5 in.	Unspecified	☐	None	None
Home Currency	1 in.		☐	None	None
Host City, Country	1.5 in.	Unspecified	☐	None	None
Host Currency	1 in.		☐	None	None
Primary Wage Code	1 in.		☐	None	None
Primary Currency	1 in.		☐	None	None
Primary to System XR and Date	1.25 in.	Unspecified	☐	None	None
System Amount	1 in.	Unspecified	☐	None	None
Primary to Company XR and Date	1.25 in.	Unspecified	☐	None	None
Company Amount	1 in.	Unspecified	☐	None	None
Primary to Home XR and Date	1.25 in.	Unspecified	☐	None	None
Home Amount	1 in.	Unspecified	☐	None	None
Primary to Host XR and Date	1.25 in.	Unspecified	☐	None	None
Host Amount	1 in.	Unspecified	☐	None	None

Run Report: HTML Run

Save | Delete | Close

The following User Report Type was created for this report.

User Report Type Details

Chedrick 7/31/2008 Chedrick 7/31/2008

Inactive	☐
* Name	Currency True-Up (Pay Register)
Description	Currency True-Up (Pay Register)
Data sensitivity	**Please Select**
* Base table	Assignment
Available at Company Level	☑
* Company Path	Choose **Assignment -> Company**

Additional Data Sources Allowed

New

Delete	Data Source	Default
☐	Employee Choose Path **Assignment -> Employee**	☐
☐	Pay Register Line Choose Path **Assignment -> Pay Register -> Pay Register Line**	☐