Manager Reporting – Insight CoreHr

03/11/2021| Version 1

# Contents

Purpose of Guide

This is intended to explain how the CoreHR Insight Module will allow Users to run a bespoke suite of reports for their Organisation.

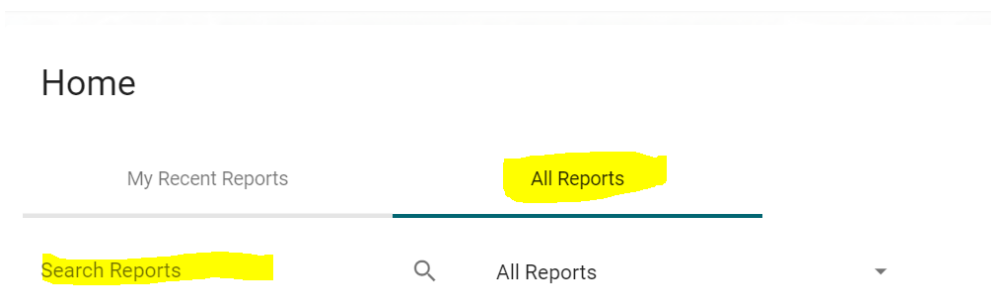Users can run these reports in Insight, and export into Excel or CSV files if they require.

Insight – CoreHR Reporting Tool

Access Insight

- From any Dashboard in CoreHR, click on the drop-down arrow and click on the Insight Module
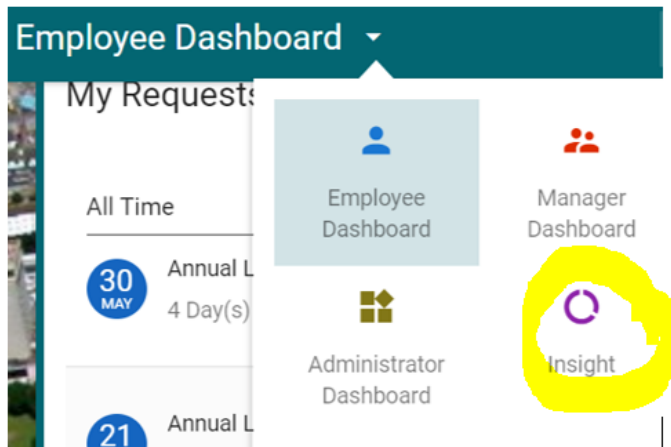
- You will automatically be taken to the Core Insight 'Home Page'

Click on the 'All Reports' Tab

- The reports we have made available to you will appear in a list in this area

- You can simply scroll down the list, or if you need to search for the report, simply type the name of the report into the Search Reports area and the system will automatically filter the reports as you type
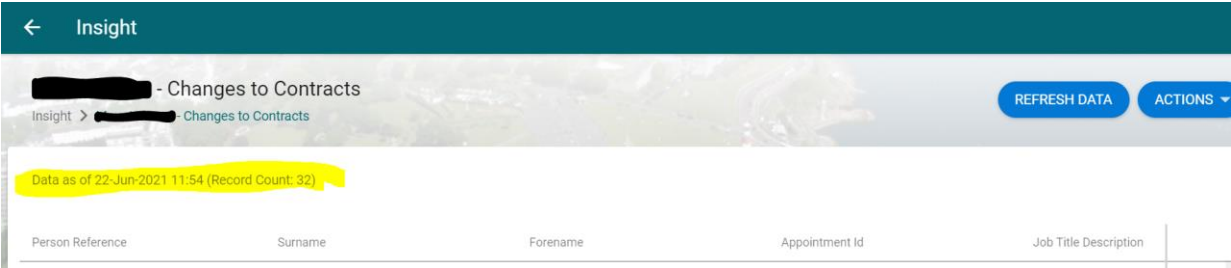
Report Name	Report Owner	Last Edited	Shared	Viewed	
Changes to Contracts	Daniel Billings	12-May-2021	2	4	⋮
Expenses	Carmen Garcia	22-Jun-2021	0	4	⋮
Leavers	Daniel Billings	12-May-2021	2	3	⋮
New Starters	Daniel Billings	12-May-2021	2	3	⋮
Sickness	Carmen Garcia	23-Jun-2021	2	10	⋮
Staff Listing	Daniel Billings	12-May-2021	2	2	⋮
Timesheet Enquiry	Daniel Billings	12-May-2021	2	8	⋮

Run Report

- Once you have found the report you want to run, go the far end of the report line, and click on the three dots (ellipsis)

View

Manage

Delete

Manage Owner

Enable Notifications

Clear Cache

Export Report

- Next Click on 'View'

- The Report will appear, but you **MUST** now click the 'Refresh Data' button, this will run the report as at the time/date you have clicked the refresh data button.

- Please be aware that this is a real time system, so each time you run the report, you must ensure you click the 'Refresh Data' otherwise, you will only see out of date data, i.e. the data that you ran the last time you hit refresh. You can always check this by looking at the report, (highlighted below in yellow is 'Data as of xx-xxx-xxxx xx:xx – this will indicate to you the lasts time the report was refreshed)
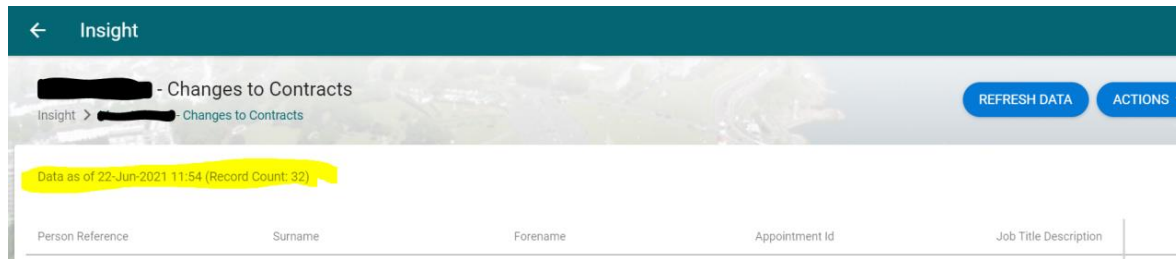
- Depending on the type of report you are running, you may be presented with 'Enter Report Prompts' for example, these may be 'Enter Date Input From' and 'Date Input To' fields, please populate these as appropriate, and click the 'OK' Button or you can simply leave these fields blank and click the 'OK'Button.

- Your report will run and appear on screen with a new date/time stamp

  Data as of 19-Jul-2021 13:50 (Record Count: 33)

- From this screen you can click on the ellipsis (three dots) and view the individual's personnel detail in CoreHR itself,

  Or

- You can Export this report.

Export Insight Report

- To Export the report, click on the Actions Button

- Select the Export Data and the 'Choose an Export Type' Screen will appear, select either download as

  - Excel

  - CSV

  - Text

  - HTML

- You can also choose to

  - Hide Report Title

  - Hide Column Headers

  - Hide Date/Time

- When you have made your choices, click on the 'OK' button

- The Report will export in the format you have chosen above – usually a pop-up box will appear in the bottom right-hand side of your screen (An image similar to the one below will appear)

- Click on the upward arrow and select 'Open when done'.
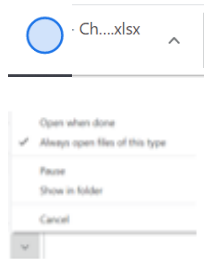
- The application you have chosen will open the report in another window. From here you can save the file to your own personal folders, or share the information, please take great care when sharing personnel data.