



## Dataviews and Reports

**Dataviews** are customized reports which can be run, exported or both displaying an in-depth view of calculation outputs from iterations. These can be grouped by periods or sites and allow deeper analysis of the budget if required.

**Reports** enable you to organize information into an easy-to-read, easy-to-distribute file format. With highly formatted and customizable layouts, reports can be scheduled to run at regular intervals and managers can be notified when a report is available.

### Dataviews

- Select the **Main Menu** icon on the left upper left corner of the home page.



- Select **Dataviews and Reports** and then **Dataview Library**.
- Select the tile of the **Dataview** that you would like to run.
  - Clicking the arrow on the right side of the box will display a description of the parameters of that particular dataview.



**UKG** Dataview Library

Navigate to Downloads

Total [38]

Name: Accruals Test  
Subject: Employee

Name: Certification Expiration Date and Skills  
Subject: Employee

**Scheduling**  
Count: 14

Name: 0-ST Approve Time Off Requests  
Subject: Employee

Name: 0-ST Schedule Detail - Shift Segment  
Subject: Employee

Name: 0-ST Schedule Planner Column Set  
Subject: Employee

Name: 0-ST Schedule Summary - Paycode  
Subject: Employee

Name: 0-ST Schedule Summary - Shift  
Subject: Employee

Name: 0-ST Time Off Requests History  
Subject: Employee

Name: 0-ST Employee  
Subject: Employee

Name: Float  
Subject: Employee

Name: Job Transfer Set  
Subject: Employee

Name: Schedule Group  
Subject: Employee

Name: Shift Swap  
Subject: Employee

Name: Staffing Dashboard  
Subject: Employee

**Timekeeping**  
Count: 14

Name: 0-ST Accrual Details - Basic  
Subject: Employee

Name: 0-ST Accrual Details - Full  
Subject: Employee

Name: 0-ST Accrual Transactions Details  
Subject: Employee

Name: 0-ST Employee Approval Summary  
Subject: Employee

Name: 0-ST Employee Hours by Job  
Subject: Employee

Name: 0-ST Employee Hours by Labor Category  
Subject: Employee

Name: 0-ST Identify Pending Corrections  
Subject: Employee

Name: 0-ST Managers with Unapproved Jobs  
Subject: Employee

Name: 0-ST Pay Period Close  
Subject: Employee

Name: 0-ST Punch Audit  
Subject: Employee

Name: Pending Timecard Transactions  
Subject: Employee

**0-ST Schedule Summary...**

Subject  
Employee

Time Period  
Current Schedule Period

Location  
All Home

Description  
Startup Dataview - Displays scheduled paycode data for employees. Filtered down to exclude null columns, and sorted by name, start date, start time, and paycode name. Recommended for managers, admins, and support roles.

Open Dataview

- Dataviews will default to the **Current Schedule Period** for **All Home Locations**. Select the drop down in order to change these parameters.



Calendar icon Current Schedule Period < > All Home Locations Refresh icon Loaded 11:01 AM

Details icon Restore icon Save icon

- Once the dataview is run, select the **Share** icon to print or export to a .csv file that will allow you to manage it in Excel or Sheets.



### Reports

- Select the **Main Menu** icon on the left upper left corner of the home page.



- Select **Dataviews and Reports** and then **Reports Library**.
- Select **Run Report**.



- A list of available reports will open on the right side of the screen.



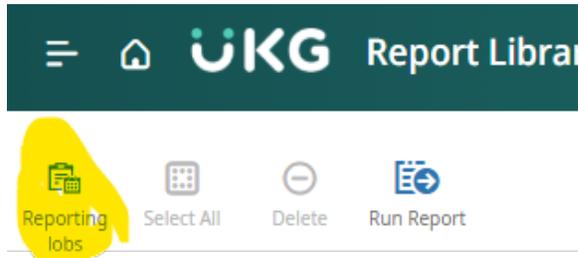
The screenshot shows the UKG Report Library interface. At the top, there is a dark green header with the UKG logo and the text 'Report Library'. Below the header, there are four icons: 'Reporting Jobs', 'Unselect All', 'Delete', and 'Run Report'. A light blue notification bar states: 'No completed reports are available. Click "Run Report" to select and run a report.' Below this, there are three expandable sections: 'Completed [0]', 'In Progress [0]', and 'Upcoming Reports [0]'. On the right side, a 'Select Report' dropdown menu is open, listing various report categories: 'Activities', 'All', 'Attendance', 'Audit', 'Healthcare Productivity', 'Human Capital Management', 'Leave', 'Scheduler', and 'Timekeeping'. Each item has a right-pointing chevron icon.

- Opening each report option will display a brief description of the contents of the selected report.
- **Select** will open the report parameters pane.
- Fill in the required data in the parameters pane.
- Select output (PDF/ CSV, XLSX).
- Select **Run Report**.



- Scheduling Reports:

- Select **Reporting Jobs** from the upper left side of the screen.



- Select **Schedule Report**.



- Opening each report option will display a brief description of the contents of the selected report.
- **Select** will open the report parameters pane.
- Fill in the required data in the parameters pane.



UKG Reporting Jobs

My Reports Refine Schedule Report

undefined undefined

▶ Scheduled Report Jobs [0]

**Reporting Jobs**

Timeframe \*  
Calendar icon < >

Hyperfind \*  
Network icon

Output Format \*  
PDF

**Schedule**  
 One-Time Scheduled Run  
 Recurring Scheduled Run

Report Date \*  
12/05/2024 Calendar icon

Time \*  
11:52 AM

**Run As**  
Select User \*  
Test, Jonathan De La Fuente  
Refresh icon

Select Role Assignment \*  
Initial Role

**Report Recipients**  
Select People \*  
Search  
Refresh icon  
 Send as Email Attachment

Cancel Schedule Rep...

- Select **Recurring Scheduled Run** and set the recurrence pattern and timeframe.



## Recurrence

Repeats

By Month ▼

Select Months \*

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> January  | <input checked="" type="checkbox"/> July      |
| <input checked="" type="checkbox"/> February | <input checked="" type="checkbox"/> August    |
| <input checked="" type="checkbox"/> March    | <input checked="" type="checkbox"/> September |
| <input checked="" type="checkbox"/> April    | <input checked="" type="checkbox"/> October   |
| <input checked="" type="checkbox"/> May      | <input checked="" type="checkbox"/> November  |
| <input checked="" type="checkbox"/> June     | <input checked="" type="checkbox"/> December  |

Day of Month

1 ▼

Start Date \*

12/05/2024 📅 Clear

Start Time \*

11:46 AM

End Date

Select a date 📅 Clear

Forever

Cancel

Apply



- Select output (PDF/ CSV, XLSX)
- Report Recipients.
- Allows you to automatically send run reports to other leaders via UKG or employee email.
- Select Run Report.