



# **EXTEND REPORTS USER GUIDE**

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## Running a Report

Expand the menu and click on the report you'd like to run.

Welcome to Ascender Pay Extend

Hello **TTRAIN1**

My Report Menu

▼ Ascender Reports

▼ Finance

DIS009 - General Ledger Postings - Single Pay Period

DIS010 - General Ledger Postings - Multiple Pay Periods

DIS012 - Leave Liability - Annual Leave

DIS013 - Leave Liability - Long Service Leave

▶ HR and Employment

▶ Leave

▶ Payroll

Click on the left handside lowest level menu options to view a report

This will then show you in the report action section the actions which you can undertake. You will find the run icon there.

My Report Menu

▼ Ascender Reports

▼ Finance

DIS009 - General Ledger Postings - Single Pay Period

DIS010 - General Ledger Postings - Multiple Pay Periods

DIS012 - Leave Liability - Annual Leave

DIS013 - Leave Liability - Long Service Leave

▶ HR and Employment

▶ Leave

▶ Payroll

▶ Training and Development

**DIS009**

DIS009 - General Ledger Postings - Single Pay Period

Run Report

Edit

Copy and Edit

View SQL Query

Share

Delete

Click on **Run Report**.



If the report has parameters, the parameters will display at the top of the report. Select/enter the parameter values, and then click on the **View Report** button to display the data.

DIS011 (REX0001011)

Back

View SQL Query

Copy

Created on : 28-JUL-2018 20:59:53 Last Edited on : 28-JUL-2018 20:59:53

Please enter START date of leave period  
01-Jul-2019

Please enter END date of leave period  
31-Jul-2019

Please select Org. Unit(s) / Division(s)  
FGSSCA - ^Fin, Op Serv, CSU Print  
FGSSFA - ^Fin, Op Serv, Fleet & Services  
FGSSLA - ^Fin, Op Serv, Campus Logistic Services  
FGSSPA - ^Fin, Op Serv, Procurement & Travel  
FGSSQA - ^Fin, Op Serv, Revenue Services  
FGSSRA - ^Fin, Op Serv, Remuneration  
FGSSSA - ^Fin, Op Serv, Finance Systems  
FHR0AA - HR, Executive Office  
FHRPSA - HR, Systems

Please select LEAVE CODE(S) to include  
ALPCH - Purchased Leave  
CMPS - CSCS, Compassionate Leave  
COSE - CSCS, Community Service Leave  
DFL - Defence Force Leave  
DFLWP - Defence Force Leave Without Pay  
DVL - Domestic Violence Leave  
HPLA - Half Pay Leave Accrual  
KIT - Keeping In Touch Days  
AL - Annual Leave  
FLEXI - Flexi Leave

View Report

## Filtering and Formatting Data in the Report Output

In the Report Output, you have the option to filter and format the data output.

Each column heading has some basic filtering options: ascending order, descending order, hide column and control break. These options can be selected by clicking on the column heading.

DIS011

Org Unit/Division	Description	Employee Name	Employee No	Job No	Lv Code	Leave Code Desc	From Date	To Date	Leave Amount	Lea Un
COMADMFINPAYGEN	Payroll Services - Central Business Unit	Filter...		01	AL	Annual Leave	26-FEB-15	27-FEB-15	2	Day
COMADMFINPAYGEN	Payroll Services - Central Business Unit	Acsix, Gemma		01	AL	Annual Leave	28-FEB-15	28-FEB-15	1.25	Day
COMADMFINPAYGEN	Payroll Services - Central Business Unit	Acthree, Jack		01	AL	Annual Leave	01-OCT-15	04-OCT-15	2.6535	Day
COMADMFINPAYGEN	Payroll Services - Central Business Unit	Brown, Samantha		01	AL	Annual Leave	27-AUG-15	31-AUG-15	3.079	Day
COMADMFINPAYGEN	Payroll Services - Central Business Unit	Bryant, Linda Louise		01	AL	Annual Leave	06-JUL-15	10-JUL-15	15	Hou
COMADMFINPAYGEN	Payroll Services - Central Business Unit	Citizen, Peter		01	AL	Annual Leave	23-JUN-15	23-JUN-15	7.25	Hou
COMADMFINPAYGEN	Payroll Services - Central Business Unit	FLINTTOFF, Freddie	KR00011	01	AL	Annual Leave				

Additional formatting options are available under the **Actions** button.



LEAVE BOOKING

Q v Go Rows 50 Actions


Employee No	Name Form	End Date	Job No	Lv R
AA0016	Chan, Josephine Danielle	10.11.1995	01	-

Select Columns

- Filter
- Rows Per Page
- Format
- Flashback
- Save Report
- Reset
- Help
- Download

## Select Columns

Allows columns to be displayed or hidden. Select >>, >, <<, < to move fields to and from display.

Click  to return to the original settings.

Select Columns

Do Not Display

Display in Report

Org Unit/Division  
Description  
Job No  
Lv Code  
Leave Code Desc  
From Date  
To Date  
Leave Amount  
Leave Units  
Med Cert  
Adv Pay  
Employee Name  
Employee No

Cancel Apply



## Filtering Data in Your Report

Filter data based on available columns and values returned. By using the **operator** field you have more flexibility than just the '=' sign.

The Filter dialog box has a title bar with a close button. It contains a 'Filter Type' section with radio buttons for 'Column' (selected) and 'Row'. Below this, there are three fields: 'Column' with a dropdown menu showing 'Org Unit/Division', 'Operator' with a dropdown menu showing 'like' (highlighted), and 'Expression' with an empty text field. At the bottom right, there are 'Cancel' and 'Apply' buttons.

## Rows per Page

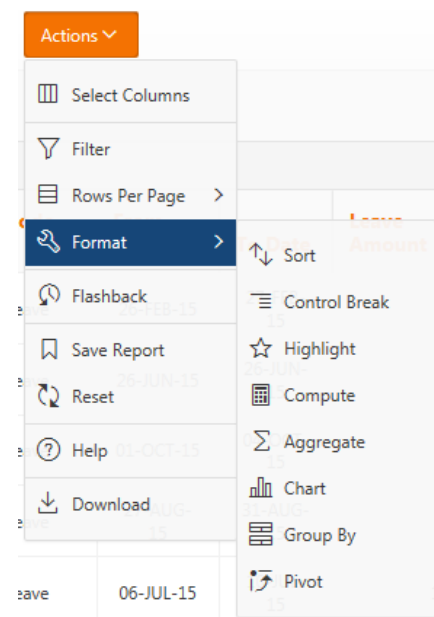
Set the number of rows displayed on each page. Can be set as low as 1, up to 5000 or all records. The option to set this value is available at the **page level** or under the **Actions** button menu.

The table interface includes a search bar with a magnifying glass icon and a 'Go' button. To the right of the search bar is a 'Rows' dropdown menu currently set to '50'. Further right is an 'Actions' button with a dropdown arrow. Below these elements is a table with the following data:

Org Unit/Division	Description	Employee Name	Employee No	Job No
AHO01100012001210A1	Consulting	Cumar, Wilfred S	001232	01

## Format

Format options available under the **Actions** button menu:





## Sort

Provides the option to sort column data at multiple levels. For example, first by employee number, then job number then start date.

## Highlight

Highlight allows you to apply colours to highlight specific rows of data.

Highlights can be applied as a background and/or text colour.

Highlight

Name

Paid

Sequence

10

Enabled

Yes

Highlight Type

Row

Background Color

#99FF99

[yellow] [green] [blue] [orange] [red]

Text Color

#99CCFF

[yellow] [green] [blue] [orange] [red]

Highlight Condition

Column

Operator

Payroll Date

is not null

Cancel

Apply

Q

Go

Rows

50

Actions

▼

✓

☆

Paid

×

Employee No	Name Form	End Date	Job No	Lv Amt	Lv Code	Lv Reason	Med Cert	Payroll Date	Reversal Date	Start Date
AA0016	Chan, Josephine Danielle	10.11.1995	01	25	AL	-	-	-	-	09.10.1995
AA0016	Chan, Josephine Danielle	23.04.1996	01	20	AL	-	-	-	-	25.03.1996
AA0017	Smith, Robert Harvey	01.03.1996	01	20	AL	-	-	-	-	05.02.1996
AA0017	Smith, Robert Harvey	09.04.1996	01	5	AL	-	-	-	-	01.04.1996
AA0017	Smith, Robert Harvey	07.01.1997	01	25	AL	-	-	-	-	02.12.1996
AA0018	Cousins, Katherine Anne	30.01.1996	01	30	AL	-	-	-	-	18.12.1995
AA0018	Cousins, Katherine Anne	19.08.1996	01	20	AL	-	-	-	-	22.07.1996
AA0019	Simpson, Mark Brian	15.01.1996	01	20	AL	-	-	-	-	18.12.1995
AA0019	Simpson, Mark Brian	19.02.1997	01	40	AL	-	-	-	-	23.12.1996
AA0017	Smith, Robert Harvey	04.07.2001	01	2	AL	-	-	07.03.2003	-	03.07.2001
H00111	Chan, Chwee Allison	03.07.2001	01	3	AL	-	-	-	-	29.06.2001
JW0012	Whichcliffe, William	31.12.2002	01	37	AL	-	-	17.09.2003	-	10.11.2002
PC0013	FLINTSTONE, TIGER	24.07.2001	01	1	AL	-	-	28.02.2003	-	24.07.2001
PC0012	FLINTSTONE, DINO	26.07.2001	01	38	AL	-	-	28.02.2003	-	22.07.2001
H00100	Lee, Mei Man	20.07.2001	01	6	AL	-	-	-	-	05.07.2001
AA0004	Bryant, Linda Louise	01.09.2001	01	68.4	AL	-	-	14.03.2003	-	18.08.2001
003013	Hunt, Violet	10.03.2003	01	7.6	AL	-	-	-	-	10.03.2003





## Aggregate

For users with knowledge of SQL, add aggregate columns to your report.

The Interactive Report Help option also available under this Actions menu will assist to setup aggregate columns.

Aggregate

Aggregation

- New Aggregation -

Function

Sum

Column

Actual hours

Cancel

Apply

This example returns the total for the Actual hours column.

Cost Centre : ---DJWTEST																	
Leave Code	Leave Code Desc	Name Report	Employee No	Job No	Date Of Birth	Service Date	Acrl Date	Lv Unit	Actual hours	Actual amount	Prorata hours	Prorata Amount	Total hours	Total Days	Total amount	Years service	Salary Hr
AL	Annual Leave	DYER, Leroy	RB0004	01	01-JAN-69	-	03-JAN-17	H	1,079.4	\$12,412.02	61.0	\$701.06	1,140.4	162.9	\$13,113.08	-	\$11.50
AL	Annual Leave	DYER, Samantha	RB0003	01	01-JAN-69	-	03-JAN-17	H	1,944.0	\$22,354.06	101.6	\$1,168.42	2,045.6	292.2	\$23,522.48	-	\$11.50
AL	Annual Leave	Fraser, Brian	GA0206	01	01-FEB-55	-	03-JAN-17	D	316.0	\$3,633.68	0.2	\$1.89	316.2	316.2	\$3,635.57	-	\$11.50
AL	Annual Leave	Fraser, Kenneth	GA0207	01	01-FEB-50	-	03-JAN-17	D	190.1	\$2,186.25	0.1	\$1.14	190.2	190.2	\$2,187.39	-	\$11.50
AL	Annual Leave	JONES, James	RB0001	01	01-JAN-69	-	03-JAN-17	H	1,121.6	\$12,897.28	0.8	\$8.62	1,122.4	160.3	\$12,905.90	-	\$11.50
AL	Annual Leave	Partie, Two	OH0002	01	01-JAN-70	-	03-JAN-17	H	653.6	\$7,515.75	0.8	\$9.07	654.4	93.5	\$7,524.82	-	\$11.50
AL	Annual Leave	PartieFTWD, Tenth	OH0010	01	01-JAN-70	-	03-JAN-17	H	657.0	\$7,554.84	0.8	\$9.07	657.8	94.0	\$7,563.92	-	\$11.50
AL	Annual Leave	PartiePTWD, Ninth	OH0009	01	01-JAN-70	-	03-JAN-17	H	1,088.0	\$12,510.91	1.3	\$15.12	1,089.3	155.6	\$12,526.03	-	\$11.50
									7,049.7	\$81,064.79	166.5	\$1,914.40	7,216.2	1,464.9	\$82,979.19		

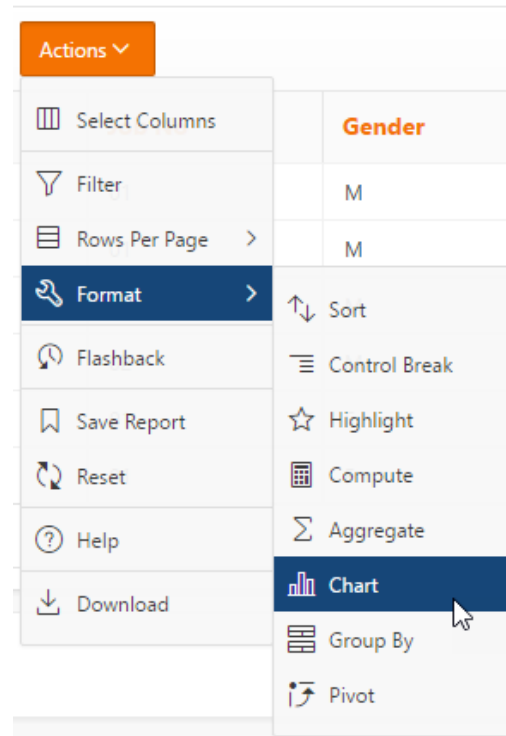


## Chart

This options lets you set up the data in one of 4 chart formats.

To add a chart to show the Gross salary of each employee.

Return to the Primary Report and clear all formatting. Then add a Chart:



The 'Chart' dialog box is shown with the following configuration:

- Chart Type:** Bar chart (selected)
- Label:** Employee No
- Value:** Gross
- Function:** Sum
- Sort:** Label - Ascending

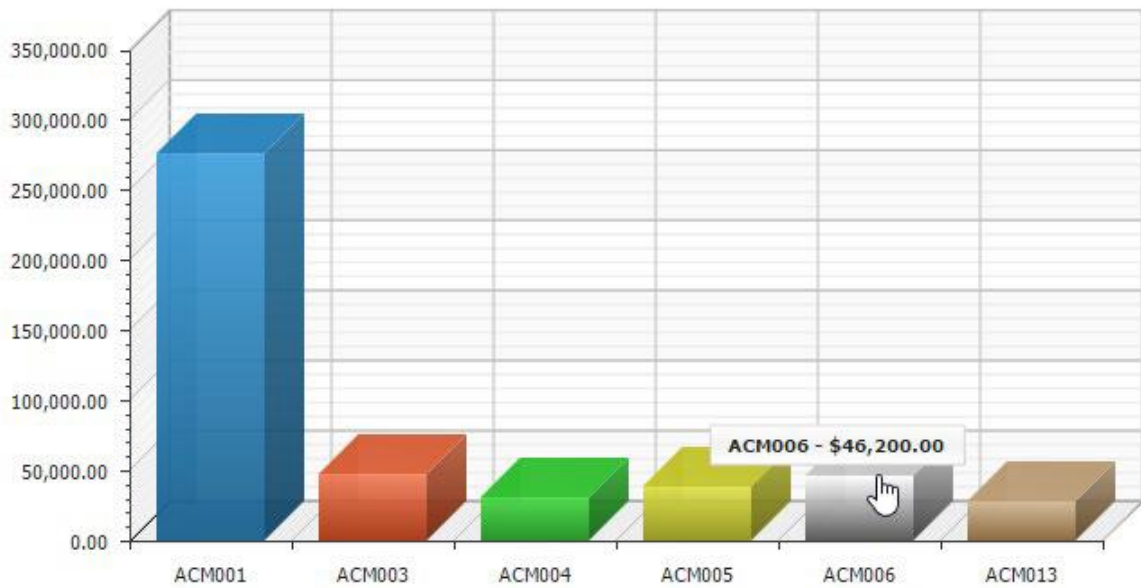
Buttons: Cancel, Apply

Select the chart type required.

Set the label to the value to report by (e.g. Employee No) and the value for the column to report on

(e.g. Gross).

Select the function and choose to sort by the label or the value then select **Apply**.



## Group by

Group by lets you order the report data into logical groups.

This example is from DIS008. It will report on Divisions (clevels) showing FTE totals for each division then a grand total (which is produced because the Sum box is checked).

Formatting can also show the \$ sign if required.

Group By

1 Division

2 - Select Group By Column -

Add Group By Column

Functions	Column	Label	Format Mask	Sum
1 Sum	FTE	Total FTE	999G999G999G999G990D00	<input checked="" type="checkbox"/>
2 - Select Function -	- Select Column -		\$5,234.10	

Add Function

Cancel

Delete

Apply

This is the report grouping generated.



DIS008

Go 2. Group by Division and Cost Centre Rows 50 Actions

▼ Saved Report = "Group by Division and Cost Centre" ×

- ✓ Division ×
- ✓ Description ×
- ✓ Cost Centre ×

Division : COMADMFINPAYGEN, Description : Payroll Services - Central Business Unit, Cost Centre : 1083145---

Employee Name	Employee No	Job No	Occup Pos Title	FTE
Achthree, Jack	ACM003	01	ACM003 Title	0.07
				0.07

Division : COMADMFINPAYGEN, Description : Payroll Services - Central Business Unit, Cost Centre : 1083166---

Employee Name	Employee No	Job No	Occup Pos Title	FTE
Achthree, Jack	ACM003	01	ACM003 Title	0.14
				0.14

Division : COMADMFINPAYGEN, Description : Payroll Services - Central Business Unit, Cost Centre : 1083417---

Employee Name	Employee No	Job No	Occup Pos Title	FTE
Achthree, Jack	ACM003	01	ACM003 Title	0.07
				0.07

## Pivot

An option to setup data to display in a Pivot table.

Enter the columns on which to pivot - switch between report views.

Enter the columns to display as rows - in the example it is Age banding.

Enter the columns to aggregate and the associated function (sum, count, average).

Pivot ×

Pivot Columns

1 LOS Banding ▼

2 - Select Pivot Column - ▼

[Add Pivot Column](#)

Row Columns

1 Age Banding ▼

2 - Select Row Column - ▼

[Add Row Column](#)

Functions	Column	Label	Format Mask	Sum
1 Sum ▼	Employee No Count ▼		999G999G999G999G990 ▼	✓
2 - Select Function - ▼	- Select Column - ▼			

[Add Function](#)

Cancel Delete **Apply**

The example above creates the following pivot chart.



	0-<1	1-2.99	10+	3-4.99	5-9.99
Age Banding	Sum Employee No Count	Sum Employee No Count	Sum Employee No Count	Sum Employee No Count	Sum Employee No Count
15-24.99	4	5	6	57	20
25-34.99	11	14	19	281	120
35-44.99	2	41	255	290	207
45-54.99	-	3	349	126	276
55-64.99	-	3	134	51	40
65+	-	-	105	140	6
-	-	-	27	-	7
	17	66	895	945	676

1 - 7 of 7

Which can be switched back to the table view by toggling the buttons.

Go 2. Pivot Chart Rows 50 Actions

Saved Report = "Pivot Chart"

Age Banding	LOS Banding	Employee No Count
15-24.99	0-<1	4
15-24.99	1-2.99	5
15-24.99	10+	6
15-24.99	3-4.99	57

## Flashback

Flashback lets you view the data as it was at a previous point in time.

Flashback

A flashback query allows you to view the data as it existed at a previous point in time.

As of  minutes ago.

Cancel

Apply

## Save Report

Use the Save Report functionality to save any additional formatting which has been applied to the report. Multiple save states can be created to save the report with different charts, aggregates, grouping, etc.



Give the saved version a meaningful name and description.

Save Report

Name

My Leave Report

Description

Leave by Leave Code

Cancel

Apply

You now have the option to run the original report version or your formatted report or see your formatting and filters applied.

DIS011

Q

Go

Default

1. Primary Report

Private

1. My Leave Report

Rows

50

Actions

Reports



This will save this settings in the output screen, not the core report.

## Reset

Reset restores the report to its default settings

Select Columns

Filter

Rows Per Page

Format

Flashback

Save Report

Reset

Help

Download



## Download Output

**Download** provides options to download and save the report output to CSV, PDF, HTML or XLSX formats.

Download


Choose report download format:

CSV HTML Email PDF XLSX

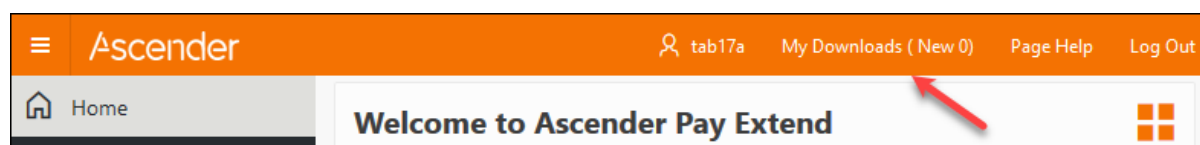
Cancel

### XLSX Download

For downloading Extend reports to Excel format, the process of writing the excel report has been separated from the process of reading the data from Ascender Pay and moved to an asynchronous background database process. This will reduce the time Extend is locked while preparing the Excel report. Additionally, you can download the same file again without rerunning the report.

 **This function is currently only applicable to Excel downloads.** It will not apply for downloads to CSV, HTML, PDF nor Email.

A link labelled 'My Downloads (New x)' will display along the top menu bar to provide quick access to the reports that have been downloaded to Excel. (New x) is a count of the number of Excel reports which you have downloaded but not viewed, and which have not yet expired.



When the button in the top menu is clicked, the 'View Downloads' page displays all Excel reports you have downloaded, which have not expired. Filter the results using the Report LOV or standard Extend functions: Filter box, Actions menu and basic sort options within each column heading.



View Downloads


Filter Report All Report LOV

Q Go Rows 50 Actions

Select	File name	Unique id	Status	Download	Run date	Expire on	Report id
-	-	123501406	Generating	Not ready	05-FEB-19	10-FEB-19	REX0003220
<input type="checkbox"/>	EMPLOYEE BIRTHDAYS_05_FEB_2019_12_58_26.xlsx	123501405	Ready	Ready to download	05-FEB-19	10-FEB-19	REX0003232
<input type="checkbox"/>	-	123501295	Error	Not ready	05-FEB-19	10-FEB-19	REX0003330
<input type="checkbox"/>	LEAVE ACCRUALS_04_FEB_2019_07_57_55.xlsx	123501237	Ready	Already Downloaded	04-FEB-19	09-FEB-19	REX0003270
<input type="checkbox"/>	AH_GEN_GL_DATA_04_FEB_2019_07_36_27.xlsx	123501234	Ready	Already Downloaded	04-FEB-19	09-FEB-19	REX0003288
<input type="checkbox"/>	AH_PAY_31_JAN_2019_15_16_00.xlsx	123501177	Ready	Already Downloaded	31-JAN-19	05-FEB-19	REX0003284

1 - 6 of 6

Delete Link to Excel Report

The report may be viewed when the status is 'Ready to download'. Click on the link under the File name to view the Excel report. If there was an Error while the Excel report was generating, hover over the  icon to view the error details. Refer to the Report ID to identify the report that has an error.

Downloaded reports will expire and be removed from this list after the 5 days.

The **My Downloads (New x)** button is also available at runtime for an individual report, after the option to download the report to Excel has been selected. In this context (New x) is a count for this specific report only, of the number of downloads available but not yet viewed, and which have not yet expired.

LEAVE ENTITLEMENTS (REX0003220)

Back Edit Report View SQL Query Copy

Created on : 24-APR-2018 11:08:40 Last Edited on : 31-JAN-2019 08:45:21

View Report My Downloads ( New 1)

In this case, the Report LOV will default to the current report being run.

View Downloads

Report LEAVE ENTITLEMENTS

Q Go Rows 50 Actions

Select	File name	Unique id	Status	Download	Run date	Expire on	Report id
<input type="checkbox"/>	LEAVE ENTITLEMENTS_05_FEB_2019_13_01_21.xlsx	123501406	Ready	Ready to download	05-FEB-19	10-FEB-19	REX0003220

1 - 1 of 1

Delete





Once you have viewed the Excel reports they will continue to display in the list until the expiry date but will not be included in the count (x) of downloads. The Status will change to 'Already Downloaded'.

As the generation of Excel reports is now a background process, you can launch the process and move onto other tasks within Extend. To do this, run and download the report to Excel as normal, then click on the 'x' to close the popup and navigate elsewhere.