



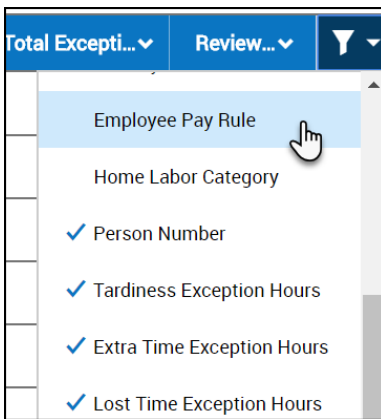
Personalize a Dataview

Customize a dataview to show just what you need to see. You can show or hide columns, sort, group by data values, and calculate values in dataviews to reveal valuable information.

Filtering columns:

You can show or hide the columns in the Dataview, and arrange data using sort and group using the Filter and Refine options.

1. Click the **Filter** icon to the right of the columns to display the list of columns that are available to show or hide within the Dataview.
2. Select each column you want to show or clear each checked column you want to hide.



Sorting, Filtering, Grouping and Calculating using Refine:

You can use the Refine menu slider on both the List view and Table View.

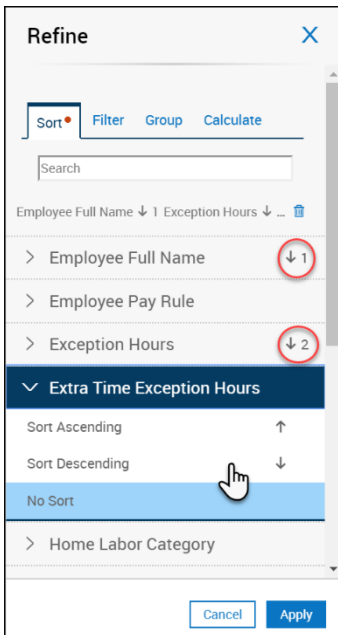
1. Select the **Refine** icon from the Action bar.
2. The Refine slider opens on the right to reveal a set of tools to Sort, Filter, Group, or Calculate data.

Sorting Columns:

Use Sort to control the order of the data that is displayed in the Dataview.

In the Refine slider:

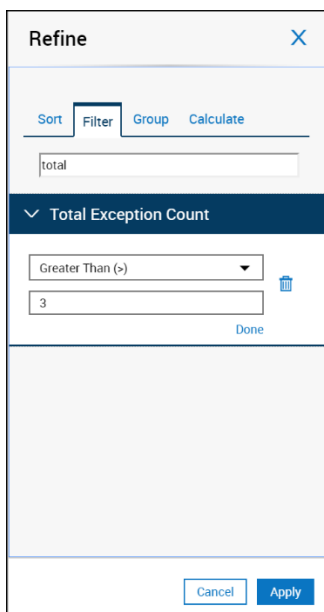
1. Click the **Sort** tab.
2. Expand the column by which you want to sort.
3. Click **Sort Ascending**, **Sort Descending**, or **No Sort**. **Note:** choose No sort to remove sorting.
4. Click **Apply**.
 - The Sort Ascending arrow or Sort Descending arrow appears next to the column name to indicate that the column is sorted in ascending or descending order.
 - If you sort using multiple columns, a number will appear next to the sorted columns to indicate the sort order (example: 1, 2, 3...).



Filtering Columns:

Select a filter to narrow the results in the Dataview to the specific items that you are interested in viewing, such as the number of part-time employees, or the top ten employees with exceptions.

1. In the Refine slider, click the **Filter** tab.
2. Select the column that you want to filter. You can select multiple filters at the same time.
3. Type the value for the filter.
4. Click **Done**.
5. Click **Apply**.



Removing filters:

1. Click **Filter** on the far-right side of the column headers.

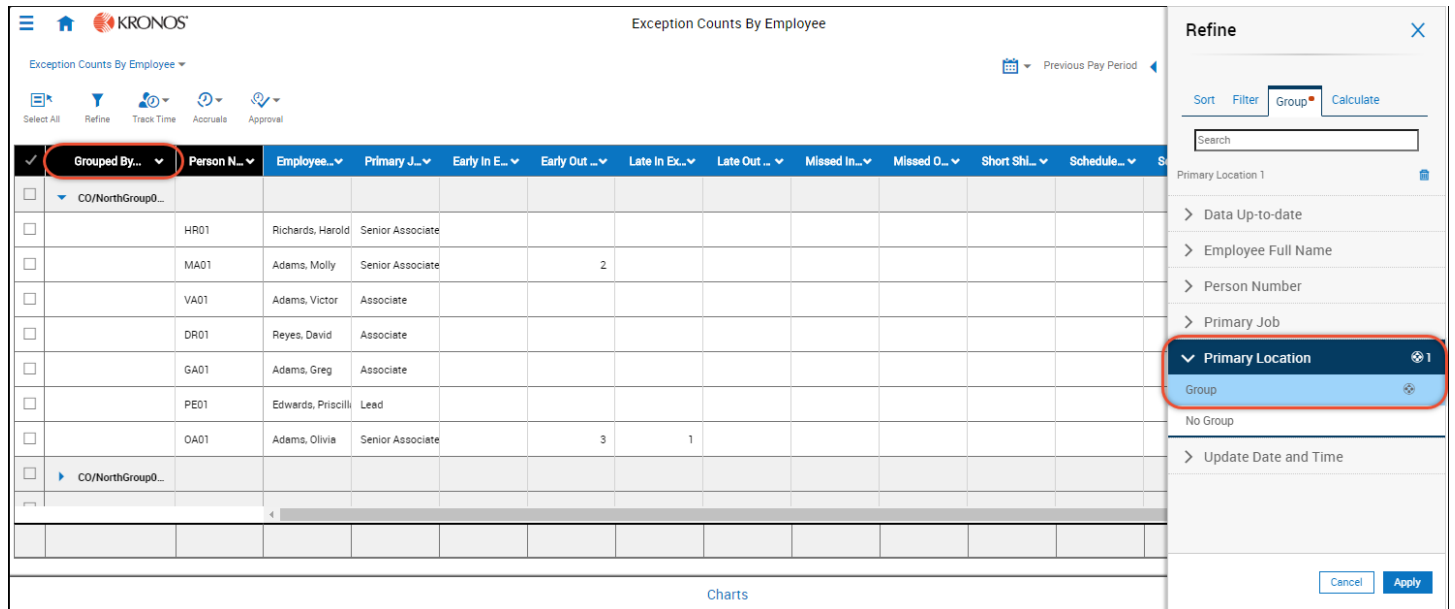
2. Click **Clear all filters**.

Grouping by Column Values:

Use Group to group the records that share a specific attribute, such as the same Primary Labor Account.

From the **Refine** menu slider:

1. Click **Group** and the column you want to use for grouping.
2. Click **Apply**.
3. The selected column is hidden, and the unique values contained within the column form groups. If preferred, you can show the column again by selecting **Filter** on the far-right side of the column headers and checking the column header name.
4. If you select an additional column to group by, it becomes secondary to the first grouping, and so on, following the order in which they are chosen.
5. All groups containing duplicate values are contained within their own section header.



The screenshot shows the 'Exception Counts By Employee' table with columns for Employee, Primary Job, Early In, Early Out, Late In, Late Out, Missed In, Missed Out, Short Shl, and Schedule. The 'Refine' sidebar on the right has tabs for Sort, Filter, Group, and Calculate. The 'Group' tab is selected, and the 'Primary Location' column is expanded in the sidebar, showing a 'Group' option.

Grouped By...	Person N...	Employee...	Primary J...	Early In E...	Early Out ...	Late In Ex...	Late Out ...	Missed In...	Missed O...	Short Shl...	Schedule...
CO/NorthGroup0...											
	HR01	Richards, Harold	Senior Associate								
	MA01	Adams, Molly	Senior Associate		2						
	VA01	Adams, Victor	Associate								
	DR01	Reyes, David	Associate								
	GA01	Adams, Greg	Associate								
	PE01	Edwards, Priscilli	Lead								
	OA01	Adams, Olivia	Senior Associate		3	1					
CO/NorthGroup0...											

To cancel grouping

1. From the **Refine** slider, select Group and expand the column for which you want cancel grouping.
2. Select **No Group**.

Note: You can also group directly from the dataview by using the column header drop-down list to select Group by this column.

Calculating and Summarizing Data:

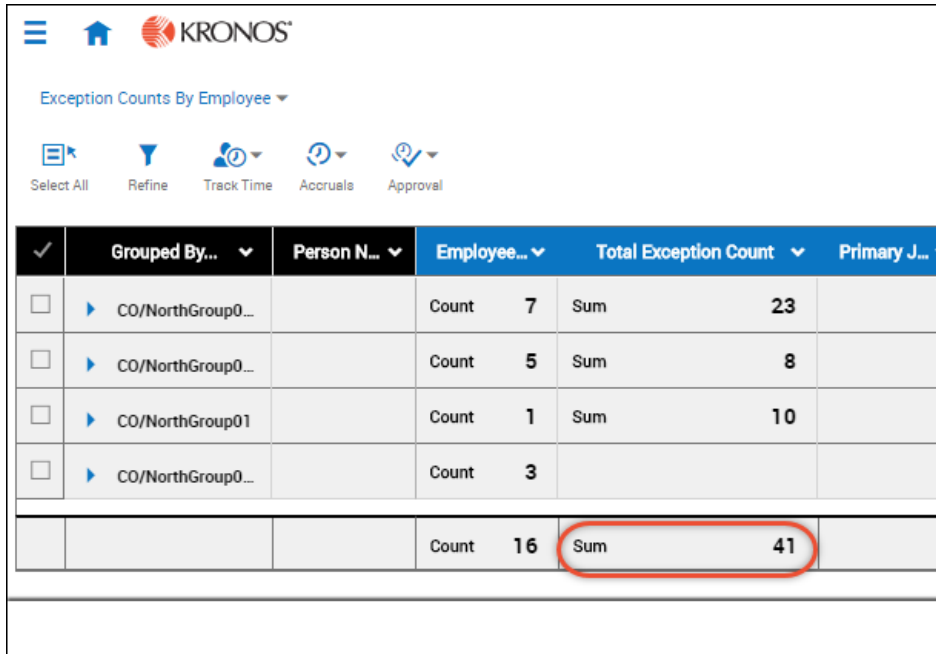
You can apply summarizations to each of the columns in the table. The available summarizations are Count, Sum, Average, Minimum, Maximum, and None.

1. In the Refine Slider, select the **Calculate** tab.
2. Expand the column header to which you want to apply a calculation.
3. Select the calculation that you want to apply.
4. Click **Apply**.

Note: You can also apply a calculation from the column header. Click the drop-down list and select the calculation you want to apply.

Summarization and grouping

If you group data, and one of the columns has a summarization applied, a sub-total row appears for each group that summarizes the data in that group. For example, if a collection of employees appears in the Total # of Worked Hours column, and SUM has been applied, if you group by an employee attribute such as Labor Category, for every unique Labor Category each employee falls into, a sub-total line appears.



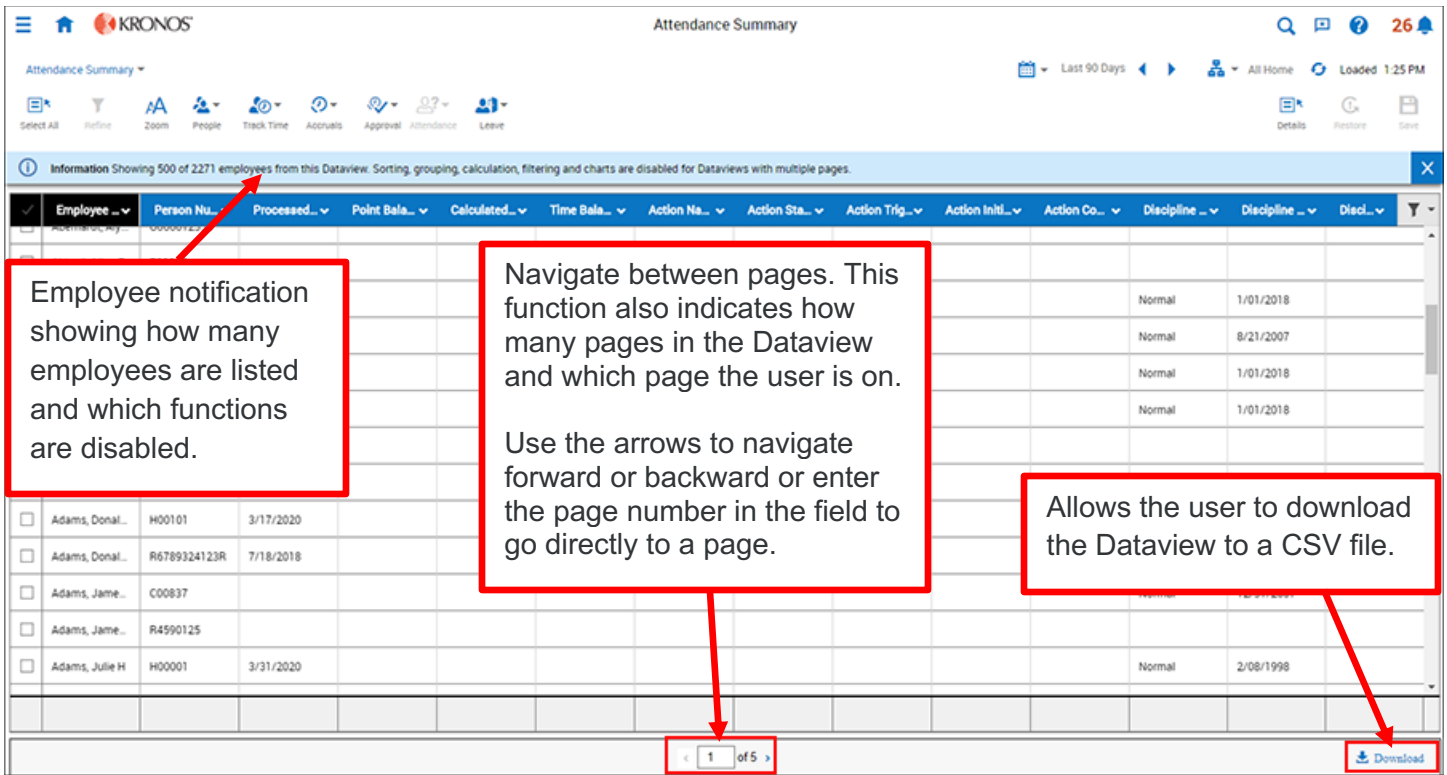
✓	Grouped By...	Person N...	Employee...	Total Exception Count	Primary J...
<input type="checkbox"/>	▶ CO/NorthGroup0...		Count 7	Sum 23	
<input type="checkbox"/>	▶ CO/NorthGroup0...		Count 5	Sum 8	
<input type="checkbox"/>	▶ CO/NorthGroup01		Count 1	Sum 10	
<input type="checkbox"/>	▶ CO/NorthGroup0...		Count 3		
			Count 16	Sum 41	

Dataview Pagination

Dataviews that return data for more than 3500 employees, such as Employee/Employee Time Series Dataviews will be rendered in the Dataview user interface in a new mode that breaks the data in pages.

- Each page will return data for 1000 employees/locations per page.
- The user can navigate between the pages or jump to a specific page.
- The user can choose to initiate the Dataview download functionality at any point.

Note: The data return trigger can be set to lower than 3500 employees/locations.



The following Dataview functions will be **enabled** when pagination mode is initiated:

- Show/Hide data columns
- Right-click actions (example **Go To** controls)
- Select employees and perform actions

Note: The user may change the hyperfind/selected locations to view a Dataview in normal, non-paginated mode.

The following Dataview functions will be **disabled** when pagination mode is initiated:

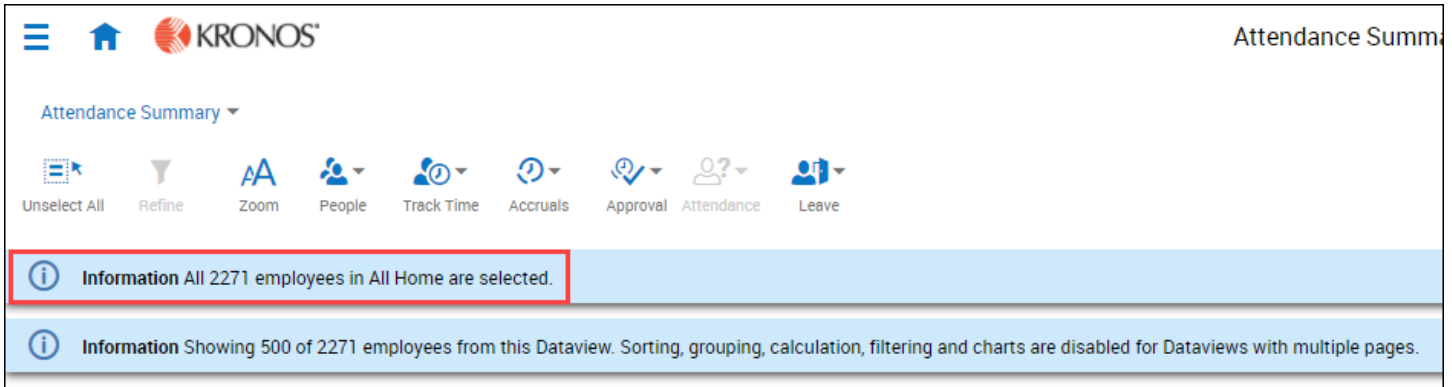
- Filtering
- Sorting
- Group By
- Calculate: SUM, AVG, MIN, MAX, MAX COUNT
- Charting
- Print
- Save (aka Personalization)
- Export

Note: Pagination will not be available in mobile.

Manager Experience

A key feature introduced in Dataview pagination mode will be the ability to truly select all employees returned in a Dataview and perform select actions such as approval and sign off.

The grid check mark for **Select All** will be disabled. Only the Select All icon will be available to managers. The **Select All** icon will ONLY select all employees across all pages.



The manager can then use the existing Action Bar to perform only the following actions:

- Approve Timecard
- Remove Timecard Approval
- Approve All Timecard Change Requests
- Sign-Off
- Remove Sign-Off
- Lock Payroll
- Enable Edits

