Dataviews

Dataviews enable you to access information about your employees or organization in real time.

Access a Dataview

Dataview appearance depends on screen resolution:

- **Grid view** - Used for desktop screen resolutions above 768 pixels.
- **List view** - Used for mobile screen resolutions.

Navigation: Main Menu > Dataviews & Reports > Dataview Library

1. On the Dataview Library page, select a **Dataview**.
2. From the toolbar, choose the **Select Timeframe** icon.
3. From the Timeframe drop-down list, select a **period** or choose the **Select Range** link.
4. From the toolbar, choose the **Select Hyperfind** icon.
5. Select a **hyperfind** to locate employees or locations of interest.

Display or Hide Dataview Columns

Show or hide Dataview columns to highlight important information.

Navigation: Main Menu > Dataviews & Reports > Dataview Library > [select a Dataview]

1. Select the **Filter** icon to the right of the column headers.
2. Available column names appear in a drop-down list. Column headings that currently appear in the Dataview are marked with a checkmark.
3. Select a **column name** without a checkmark to display the column.
4. Select a **column name** with a checkmark to hide the column.
5. (Optional) Select the **downward-facing arrow** next to each column heading on the Dataview and then select **Hide Column**.

Sort Dataview Columns

Use Sort to control the order of the data displayed in a Dataview. Multiple columns can be sorted.

1. From the toolbar, select **Refine**.
2. From the Refine panel, choose the **Sort** tab.

   A list of column headings appears.

3. Select a **column name** and then from the drop-down list, select **Sort Ascending, Sort Descending, or No Sort.**
4. Note: Select **No Sort** to remove sorting.
5. Select **Apply**.

   The Sort Ascending arrow or Sort Descending arrow appears next to the column name to indicate the current sort order. If you sort multiple columns, a numeric value indicates sort order priority.

6. (Optional) From the Dataview, select a **downward-facing arrow** to the right of any column heading.
   a. From the drop-down list, select **Sort Ascending** or **Sort Descending**.
   b. To remove the sort order, select **Sort Ascending** or **Sort Descending** again.

Filter Dataview Columns

Filter data in a Dataview to focus on information of interest. Multiple columns can be filtered.

Navigation: Main Menu > Dataviews & Reports > Dataview Library > [select a Dataview]

1. From the toolbar, select **Refine.**
2. From the Refine panel, select the **Filter** tab.

   A list of column headings appears.

3. Filter a column.
   a. From the panel, select a **column name**.
   b. From the drop-down list, select an **operator**.
   c. Enter a **value** for the filter.
   d. Select **Done**, and then select **Apply**.
4. Remove a filter.
   a. From the panel, select a **filter** to the right of a column name.
   b. From the operator drop-down list, select **No Filter**. Or, select the **Delete** icon.
   c. Select **Done**, and then select **Apply.**

Group Dataview Columns

To facilitate viewing, you can group records that share a specific attribute, such as the same Primary Labor Account.

Navigation: Main Menu > Dataviews & Reports > Dataview Library > [select a Dataview]

1. From the toolbar, select **Refine**.
2. From the Refine panel, select the **Group** tab.

   A list of column headings appears.

3. Define a group.
   a. Select a **column name**.
   b. Select **Group**.

      The selected column is hidden and the unique values contained within the column form groups. You can show the column again by selecting Filter on the far-right side of the column headers and selecting the column header name.

      If you select an additional column to group, it becomes secondary to the first grouping.

      All groups with duplicate values are included within their own section header.

4. Select **Apply**.
5. (Optional for non-numeric data types) From the Dataview, select a **downward-facing arrow** to the right of any column heading and then select **Group** by the Column.
6. Ungroup columns.
   a. From the Refine slider, select the **Group** tab.
   b. Expand the column name for which grouping should be removed.
   c. Select **No Group**.
   d. Select **Apply**.

Save a Dataview

After modifying a Dataview, save the changes to overwrite the previous version.

Navigation: Main Menu > Dataviews & Reports > Dataview Library > [select a Dataview]

1. Select a **Dataview** and modify as needed.

   After the Dataview is modified the Save icon becomes active.

2. Select **Save**.

Restore a Dataview

You can easily undo, or restore, a Dataview to the original version.

Navigation: Main Menu > Dataviews & Reports > Dataview Library > [select a Dataview]

1. To return to the original Dataview settings, select **Restore**.

2. A warning message appears.

3. Select **OK**.