Employer eServices Customer Reporting
Saving, Exporting, and Printing Reports

Task	Step or Option	Action or Option Description
Saving a Report as a Template	1	Click the **Save** icon from the toolbar to open the **Save As** dialogue box.
	2	Click the **Create New Folder** icon in the **Save As** dialogue box. *To create a report sub-folder see the next task.*
	3	Type a unique report name into the **Folder** field. *A unique report name helps identify the report for retrieval purposes. By default, the system-generated report name appears, however, you must give your report a unique name.*
	4	Enter a brief description of your report into the **Description** field. *A unique description can further identify the characteristics that differentiate this report from similar types of reports. By default, the system-generated report description appears.*
	5	Click **Create Folder**
	6	Click **OK** to save the report with the default options and now the **Report Saved** dialog box opens. *You can modify the default options as noted below in **Advanced Options for Saving a Report as a template.***
	7	Finally select one of the following options: **Return to Original Report** – to go back and view the original report you just saved. **Run Newly Saved Report** – to create another version of the original report you just saved.
Advanced Options for Saving a Report as a Template	Save Options:	**Advanced Save Defaults and Option Definitions:**
	Save report as static	Default: **Deselected** Option Description: To allow you to change the report prompts when you re-open the report. If you change to **Selected,** when you re-open the report, you lose the ability to modify the report prompts. Choosing **Selected** is the same as **Deselecting** the **Save Report as Prompted** from the **Advance Options** dialogue box.

Task	Step or Option	Action or Option Description
Advanced Options for Saving a Report as a Template (cont.)	**Save Report as Prompted**	Default: **Selected / Filter and template will be prompted**
		Option Description: Allows you to controls the edits from the **Prompt** screen you run the template. If you **deselect** this option, you activate the previous option, **Save report as static.**
		Click one of the following to change the edits to be saved
		• **Only filter will be prompted –** Only the filters or limits applied to the custom reports will be saved when you re-open the report.
		• **Only template will be prompted -** Only the format of the custom report will be saved when you re-open the report.
		• **Both filter and template will be prompted –** Both the filter or limits and format of the custom report will be saved when you re-open the report.
	Only Filter will be Prompted	Default: **Deselected**
		Option Description: Allows you can add more details to your report. If you **select** this option, you lose the ability to add additional details to your report, like adding a **report on.**
	Only Template will be Prompted	Default: **Deselected**
		Option Description: Allows you to edit your population, dates and other filters, like **filter ons** and report specific limits. If you **select** this option you lose the ability to edit your population, dates and **filter ons.**
	Filter and Template will be Prompted	Default: **Selected**
		Option Description: Allows you to edit all the options in the report template. If you **deselect**, you lose the ability to modify the options.
	Set the Current Prompt Answers to be the Default Prompt Answers	Default: **Selected**
		Option Description: Allows you to keep the original options used when you created the report template. If you **deselect,** you lose the original options and need to reselect all the options.
	Keep Filter Modifications	Default: **Deselected**
		Option Description: Allows you to limit the report results and keeps the filters used when you created the report template. If you **select** you lose the ability to modify the **filters** when you create a new report.

Task	Step or Option	Action or Option Description
Exporting	1	Open the report you want to export: Click the **Export** icon on the toolbar to open the "Export Options" screen.
	2	Click **Export**
Default Settings for Exporting	**Export Options:**	**Export defaults and options definitions:**
	Export	Default: **Whole Report** Other Options: • **Portion Displayed Only** – exports only the output visible on your "report Results" screen.
	Export Grids To	*This option sets the file format used to display the results.* Default: **Whole Report** Other Options and Descriptions: • **Excel with Plain Text** -- creates a text (.txt) file you can view and edit using Microsoft Excel. • **CSV File Format** -- creates a comma separated value (.csv) file. • **Excel with Formatting --** creates an Excel workbook (.xls) file you can view and edit using Microsoft Excel. • **HTML** -- creates a Hypertext Markup Language (.html) file. • **Plain Text** -- creates a text (.txt) file using comma, tab, semicolon or space delimiters.
	Export Metric Values as Text	Default: **Deselected** Option Description: Option to format metric values (calculated results) as text when exported to Excel.
	Export Headers as Text	Default: **Deselected** Option Description: Option to format the contents of your report's headers as text when exported to Excel
	Export Filter Details	Default: **Selected** Option Description: Option to include your report's filter details in the output of your exported file. **Filter Details** are the selections you made to limit your report's data, as well as those that were automatically applied to limit the data.
	Remove Extra Column from Exported Grid	Default: **Selected** Option Description: Option to automatically strip excess columns from files exported to **Excel with Formatting**.

Task	Step or Option	Action or Option Description
Printing	1	Click the **Print icon** on the **toolbar** to open the Print Option window
	2	Click Print
Default Settings for Printing	**Print Options:**	**Print defaults and options definitions:**
	Header and Footer	*This option allows you to modify the report header and footer.* Default: Blank - **you must designate** To modify the content of the header and footer, click **Edit Custom Settings.** Now click to move your cursor into the area of the page where the company's name should appear and enter the header and footer data. Type your company's name into the field. Click **Apply**.
	Print Cover Page with Filter Details	*This option prints the report filter details when the report is printed.* Default: **Deselected** Option Description: Option to designate if the report filter details print when you print the report.
Advanced Default Settings for Printing	**Advanced Print Options:**	**Advanced Print defaults and options definitions:**
How to Access these Options:	From the **Print Options** screen, click on **Show Advanced Options**	
	Orientation	Default: **Portrait** Other Options and Descriptions: • **Landscape** – orients paper to print report horizontally (length X width). • **Portrait –** orients paper to print report vertically (width X length)

Task	Step or Option	Action or Option Description
Advanced Default Settings for Printing (cont.)	**Paper Size**	*The paper size is shown in inches.* Default: Letter 8.5" X 11" • Letter 8.5" X 11" • Legal 8.5" X 14" • Executive 7.25" X 10.5" • Folio 8.5" X 13" • A3 11.69" 16.54" • A4 8.27" 11.69" • A5 5.83" 8.27"
	Margins	Default: **.5 inches** on left, right, top and bottom.
	Max Header Size	Default: **5 inches** maximum space below the top margin.
	Max Footer Size	Default: **5 inches** maximum space below the top margin.
Adding Your Company's Name to a Printed Report	1	From the "Print Options" screen, click on **Edit Custom Settings.** The "Header/Footer Editor" screen opens.
	2	Click to move your cursor into the area of the page where the company's name should appear.
	3	Type your company's name.
	4	Click **Apply.** The name of the company will appear when you print the report.
Saving (Exporting) a Report as a PDF File	1	Click the **PDF** icon on the toolbar to open the "PDF Options" screen.
	2	Click **Export**.
Default Settings for Saving (Exporting) a Report as a PDF File	**PDF Export Options:**	**PDF Export Defaults and Options Definitions:**
	Export	*This option limits how much of the report is exported.* Default: **Whole Report** Other Options: • Portion Displayed Only – exports only the output visible on your "report Results" screen.

Task	Step or Option	Action or Option Description
Default Settings for Saving (Exporting) a Report as a PDF File (cont)	**Header and Footer**	*This option allows you to modify the report header and footer.* Default: Blank - **you must designate** To modify the content of the header and footer, click **Edit Custom Settings.** Now click to move your cursor into the area of the page where the company's name should appear and enter the header and footer data. Type your company's name into the field. Click **Apply**.
	Scaling	*This option allows you to adjust the PDF's font size to the page size selected.* Default: **Adjust Font to 100% of original size.** Other Options: • **Adjust Font to XXX% of Original Size** – simply increase or reduce the text size by entering a percentage in the text field. If you choose a percent greater than 100, the font size increases. If you choose a percent less than 100, the font size decreases. • **Fit to Page** – automatically resizes the output of the report to automatically fit the number of pages you select.
	Orientation	Default: **Portrait** Other Options and Descriptions: • **Landscape** – orients paper to print report horizontally (length X width). • **Portrait** – orients paper to print report vertically (width X length)
	Print Cover Page with Filter Details	*This option prints the report filter details when the report is printed.* Default: **Selected** Option Description: Option to designate if the report filter details print when you print the report.
	Expand all Page-by Fields	Default: **Selected** Option Description: Option to designate which page version of the report is exported. This option only appears when a report contains at least one "page-by" selection.

Task	Step or Option	Action or Option Description
Advanced Default Settings for Saving (Exporting) a Report as a PDF File	**Advanced PDF Export Options:**	**Advanced PDF Export Defaults and Options Definitions:**
How to Access these Options:	From the "Print Options" screen, click on **Show Advanced Options**	
	Paper Size	*The paper size is shown in inches.* Default: Letter 8.5" X 11" • Letter 8.5" X 11" • Legal 8.5" X 14" • Executive 7.25" X 10.5" • Folio 8.5" X 13" • A3 11.69" 16.54" • A4 8.27" 11.69" • A5 5.83" 8.27"
	Margins	Default: **.5 inches** on left, right, top and bottom.
	Max Header Size	Default: **5 inches** maximum space below the top margin.
	Max Footer Size	Default: **5 inches** maximum space below the top margin.
	Embedded Fonts	Default: **Deselected** Option Description: Option to include the report's font style into the PDF document.