Report Center Implementation Guide

Welcome to the Report Center Implementation Guide outlining the steps to set up, activate and get started with Report Center in ClientSpace

ClientSpace R167

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Company Website: http://www.prismhr.com

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Contents

Chapter 1

Sigma Report Center: What's Changing From Izenda to Sigma

What’s Changing in Your Reporting Experience?

We’re upgrading the reporting and analytics experience inside ClientSpace by moving from Izenda to Sigma Report Center as our embedded analytics engine. Sigma Report Center is fully integrated directly into ClientSpace just like Izenda is today but it brings a more modern, intuitive, and flexible experience for exploring your data and building reports.

Here’s what you can expect.

A More Modern, User-Friendly Interface

Report Center uses a clean, spreadsheet-style interface that makes working with data feel familiar and intuitive, even if you’re not a technical user. This interface is designed to make it easier to sort, filter, and explore data without needing SQL or advanced training.

By comparison, while Izenda is also web-based and accessible, many users find its report creation interface less intuitive and harder to use for everyday analysis. For instance, Report Center reports appear on a Home Page as a series of tiles and under each tile, you can store unlimited views which are customized subsets of the orginal report. This makes for a much cleaner interface and far better organization of your reports over Izenda.

What this means for you:

You will spend less time figuring out how to build, adjust or locate a report and more time actually analyzing your data.

Faster, Real-Time Data Exploration

Report Center connects directly to cloud data warehouses, allowing you to work with live data in real time. There’s no waiting for data extracts or slow refresh cycles. Changes you make to your report or dashboard update instantly because they are powered by cloud-native performance.

Izenda supports embedded reporting well, but it does not offer the same cloud-native, real-time model Sigma Report Center provides.

What this means for you:

Your dashboards and reports will feel faster and more responsive, especially when exploring large or complex datasets.

More Interactive Dashboards

With Report Center, dashboards are designed for flexible, interactive analysis. You can easily drill down, adjust filters, and explore trends without switching screens or jumping through multiple menus.

Izenda also offers embedded dashboards, but Sigma’s cloud-enhanced visuals and user experience provide a more modern, fluid interaction style.

What this means for you:

You’ll be able to answer questions more easily on your own from directly inside your existing dashboards.

Still Fully Embedded in the Application

Just like Izenda today, Sigma Report Center will be fully integrated into ClientSpace as its own module. With a few simple configuration steps, you will be able to simply add "Report Center" to the menu bar of ClientSpace. Additionally, you can sync existing ClientSpace roles to Report Center and easily assign Report Center license types to ClientSpace roles and manage workbook (i.e., report) access.

You can also set reports (or report elements such as charts and tables) as ClientSpace widgets, custom modules and custom dataform links.

What this means for you:

- No additional login
- No switching to another website
- No new navigation structure to learn
- A straightforward way to assign report access
- The ability to fully integrate reports into ClientSpace as widgets and dataform links.

In Summary...

Sigma is integrated into ClientSpace, supported by the same permissions and workflows as the rest of the application. You will get a more powerful reporting tool within ClientSpace. You will get simpler, more flexible ad-hoc analysis as Sigma is designed for on-the-fly analysis and encourages users to explore data freely using its spreadsheet-like layout and no-code capabilities.

Note: Izenda supports ad-hoc reporting as well, but some users find the workflow more rigid or harder to modify when exploring data.

Because Sigma is built for both business users and data teams, dashboards and reports will look more consistent and behave more predictably across the application. (Even the filter drop-downs on Sigma Report Center reports work in ClientSpace. Users can filter data on-the-fly.) Sigma’s design helps ensure that all embedded dashboards share the same modern visual language and interaction patterns. You’ll see a more cohesive reporting experience across the platform that is cleaner, clearer, and more unified.

What this means for you:

- **User Interface** - More intuitive, spreadsheet-like design in Sigma versus Izenda’s more complex UI. Modern, interactive dashboards offer deeper exploration capabilities.
- **Performance** - Real-time, cloud-powered responsiveness with Sigma.
- **Full integration** - Sigma is fully embedded like Izenda. No new logins or external navigation.
- **Overall Experience** - A more modern, intuitive, and faster analytics environment inside of the ClientSpace application.

Related Topics:

Chapter 2

Report Center to ClientSpace Integration Configuration

This chapter details how to configure the Report Center platform for ClientSpace in just a few easy steps.

You will learn how to:

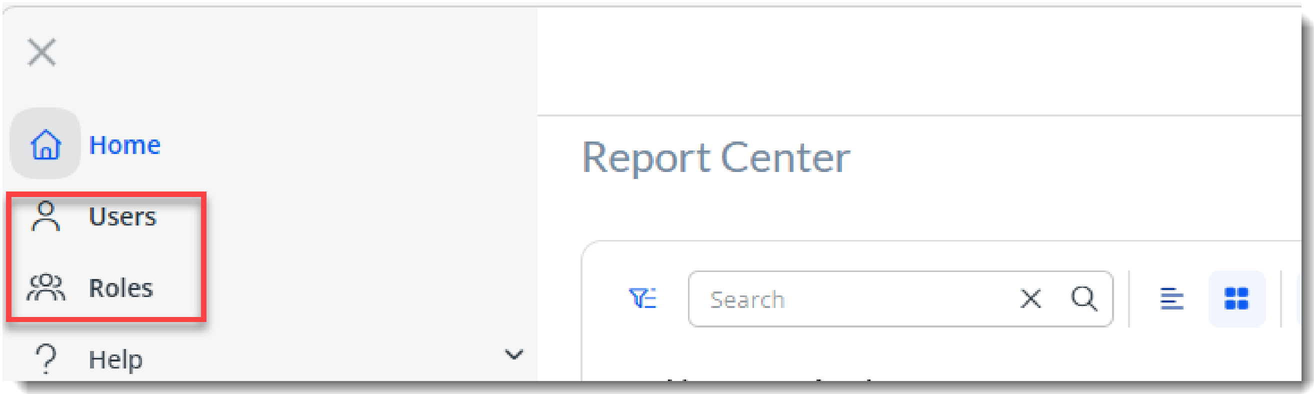
- Designate a Report Center Administrator
- Add the Report Center module to ClientSpace User Profiles
- Assign License Types to users in Report Center
- Sync Roles and Assign License Types to Roles and Reports

Also included in this section:

- Report Center User Maintenance

Step 1: Designate Report Center Administrators

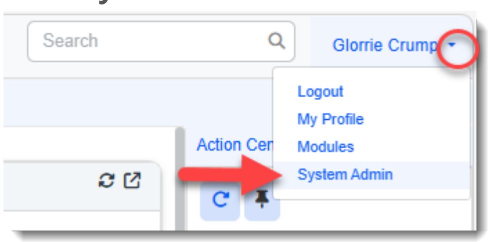
The first step in implementing Report Center is to allow your Report Center Administrator(s) access to the system. Users with Administrator access to Report Center are able to manage users and roles in Report Center. They can see and access the **Users** and **Roles** links on the Report Center navigation pane:



Note: You must be a Global Administrator or above in ClientSpace to configure Report Center Administrator access.

To designate a user as a Report Center Administrator:

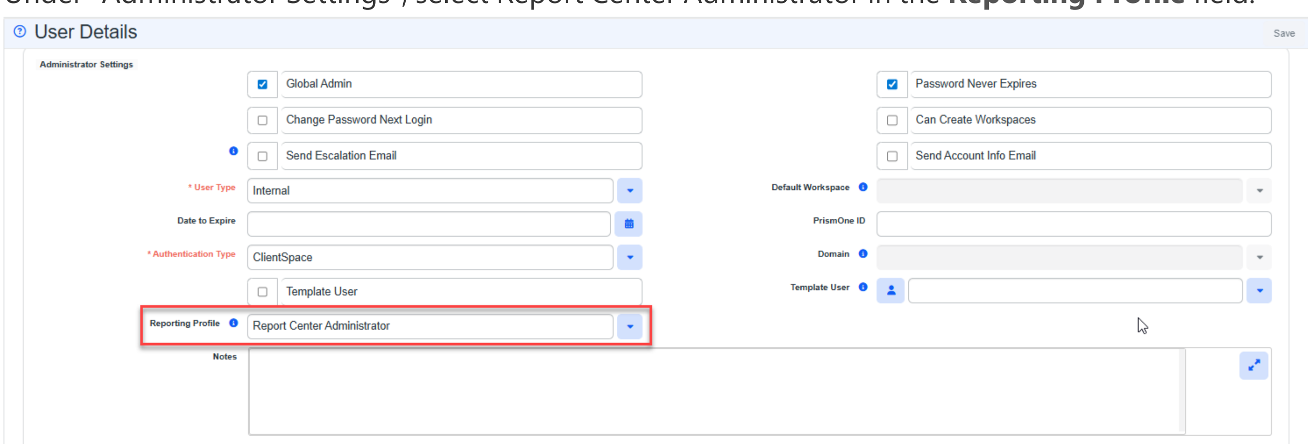
1. Go to **System Admin** ⚙ > **Resources** > **Users**.



   The Users dashboard displays.

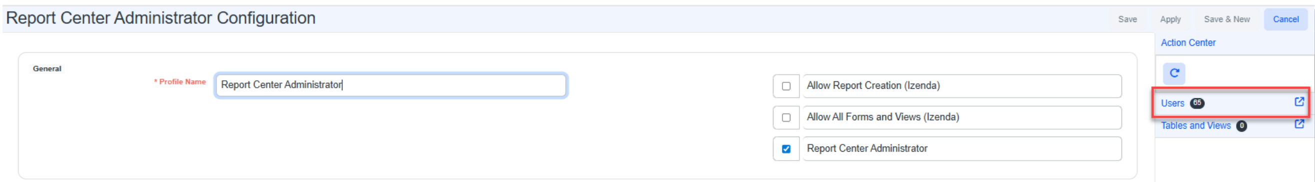
2. To edit a user account, highlight the row and click (**Open**) or **Edit**.
   The User Details form opens.

3. Under "Administrator Settings", select Report Center Administrator in the **Reporting Profile** field.



4. Click **Save**.

Note: Once you add the user as a Report Center Administrator, they are added under **System Admin** > **Security** > **Reporting Profile** to the Report Center Administrator profile. If you access this profile, you can click **Users** in the Action Center to view and manage the list of users with Report Center Administrator access:



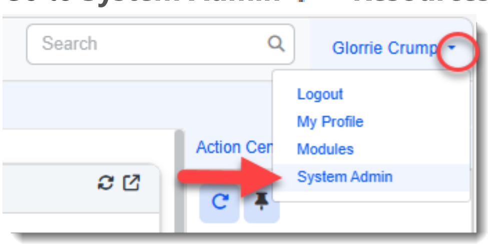
Step 2: Add the Report Center Module to User Profiles

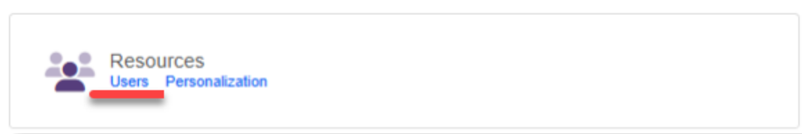
The next step in implementing Report Center is to add the Report Center module to the user profiles of all users who will be using Report Center.

Note: You must be a Global Administrator or above in ClientSpace to configure Report Center Administrator access.

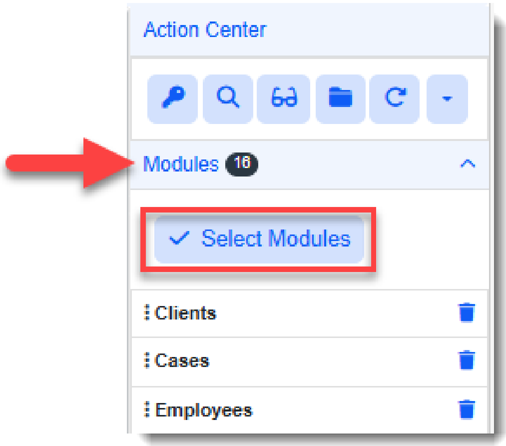
To add the Report Center module to a ClientSpace user profile:

1. Go to **System Admin** > **Resources** > **Users**.



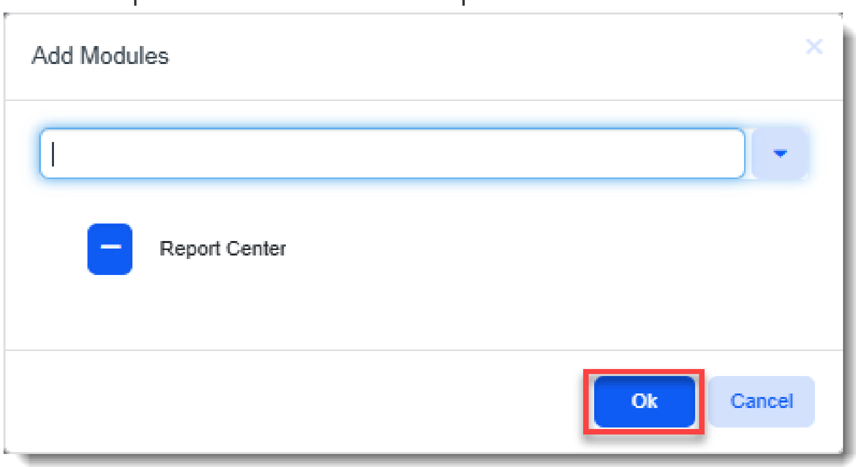


   The Users dashboard displays.
2. To edit a user account, highlight the row and click (**Open**) or **Edit**.
   The User Details form opens.
3. In the Action Center, click the **Modules** link and then click the **Select Modules** button.



The Add Modules popup window displays.

4. Select "Report Center" from the drop-down list.

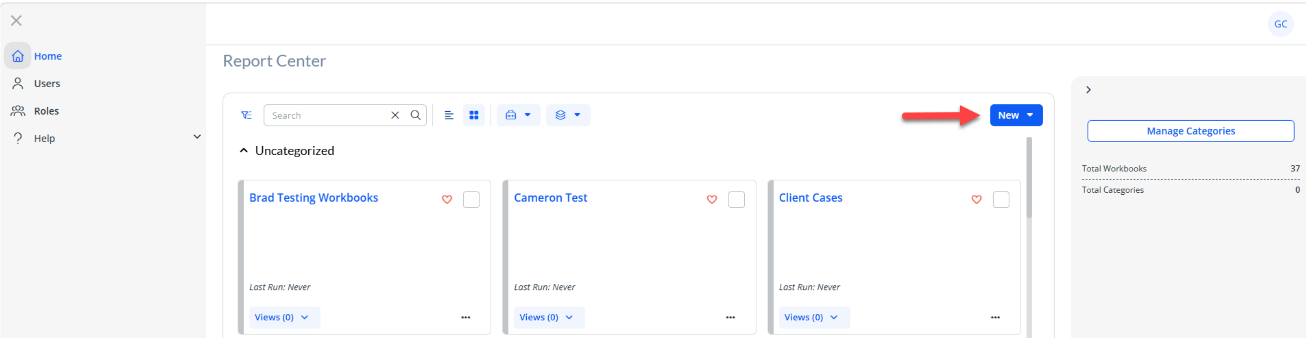


5. Click **Ok**.

Step 3: Assign License Type to Users in Report Center

Report Center Administrators can assign a license type to users or roles in Report Center. In this topic, we will show you how to assign license types to individual users. (See the next topic to learn how to pull in ClientSpace roles and assign license types to roles.)

Users with an **Editor** license type will see a **New** button on the Report Center **Home** page.



An **Editor** license type is required to view and personalize existing workbooks plus create new workbooks and use "join tables" functionality. An **Editor** can also change the base workbook file.

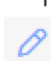
A Sigma workbook is the primary, saved container for data analysis (data, charts, and layout) acting as the "single source of truth". A workbook view (also referred to as a custom view) is a personalized layer built on top of a published workbook, allowing users to filter, sort, or explore data without altering the original, shared workbook. Therefore, users with **Editor** access can alter the "source" which impacts all related views.

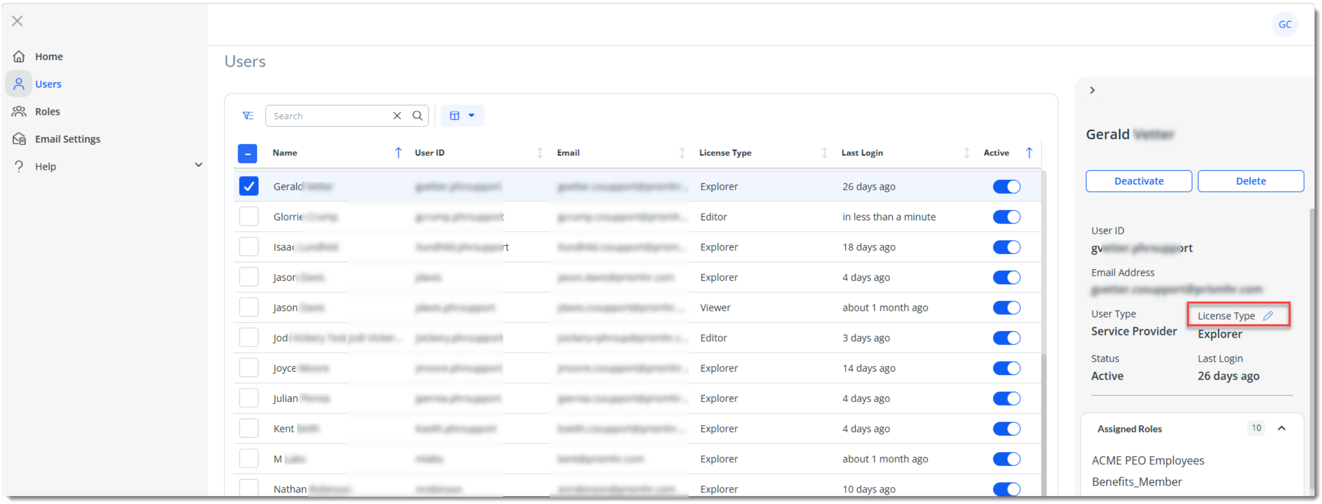
Note: The **Editor** license type can only be assigned to individual users. Only **Viewer** and **Explorer** license types may be assigned via roles.

A **Viewer** license type allows a user to execute reports. An **Explorer** license type allows users to view and personalize existing workbooks. However, they cannot change the base workbook file. They can save a view and personalize it.

To assign a license type:

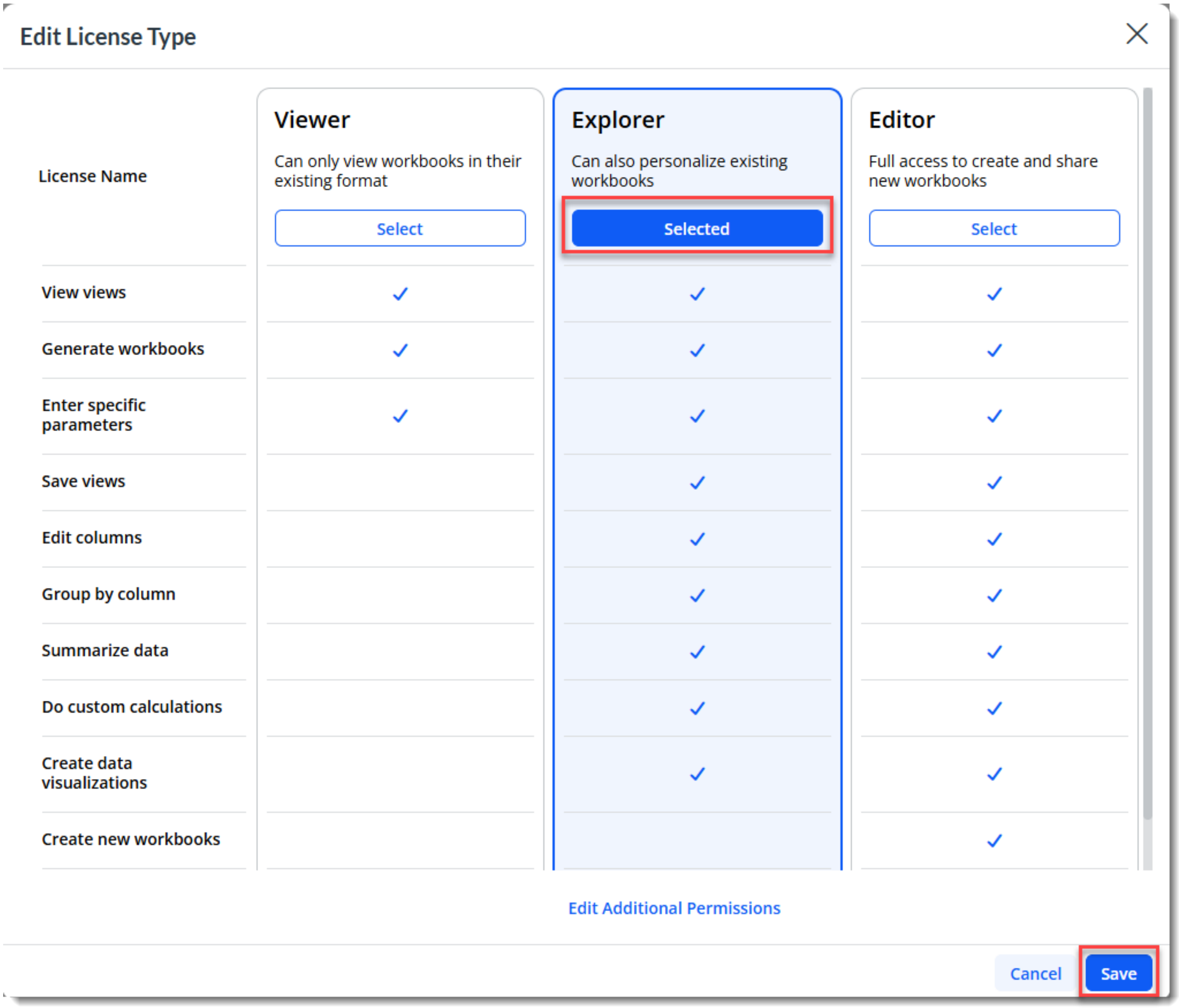
1. Click **Report Center** on the on the ClientSpace menu bar.

2. Select **Users** in the left pane.
3. Click the checkbox next to a user's name.
   The right panel displays user details and settings.
4. Click the pencil  icon next to **License Type**.



The Edit License Type window displays.

5. Click the **Select** button under the license type you want to assign.
   The button name text changes to "Selected".



6. Click **Save**.

Step 4: Sync Roles and Assign License Types to Roles and Reports

In the previous step, you learned how to assign Report Center license types to individual users.

Note: The **Editor** license type can only be assigned to individual users. Only **Viewer** and **Explorer** license types may be assigned via roles.

If you want to assign **Viewer** and **Explorer** license types to ClientSpace roles, you can sync roles from ClientSpace to Report Center which pulls the ClientSpace roles into the **Roles**  page of Report Center. From there, you can assign a license type to the role.

Note:

- If a user belongs to more than one ClientSpace role, ClientSpace automatically uses the role with the highest license type level to determine that user's Report Center access. For example, **Explorer** access overrides **View** access.
- If you later add a new role, you can sync the roles again to pull in any new roles. Existing configuration will not be affected.

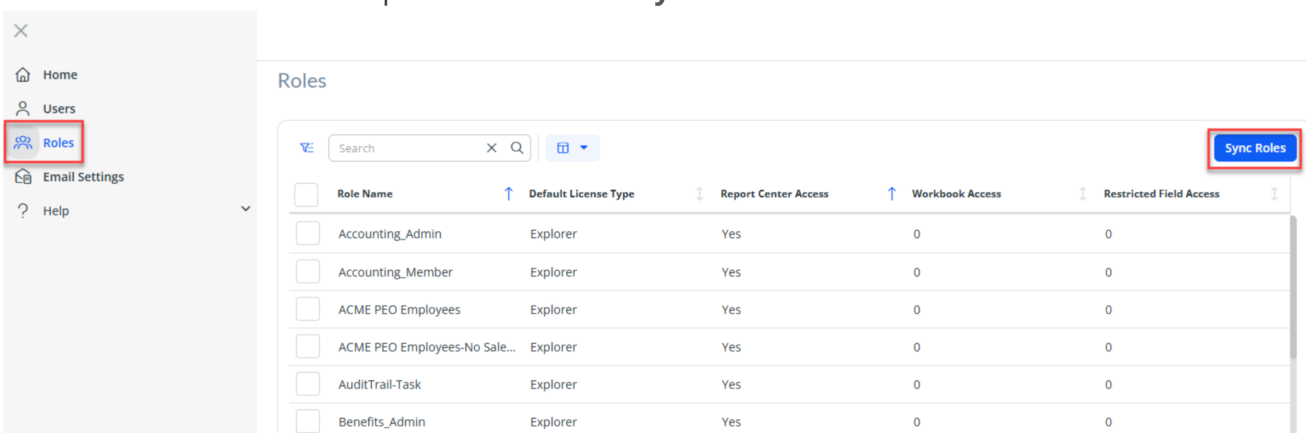
Roles are also used when assigning access to individual workbooks. This topic will also cover assigning access to workbooks using roles.

Sync Roles from ClientSpace to Report Center

To sync roles in Report Center:

1. Click **Report Center** on the on the ClientSpace menu bar.

2. Select **Roles**  in the left pane and then click **Sync Roles**.



Note: All the roles come over with a **Default License Type** of Viewer. Assign a different license type (see below) to roles that require more rights.

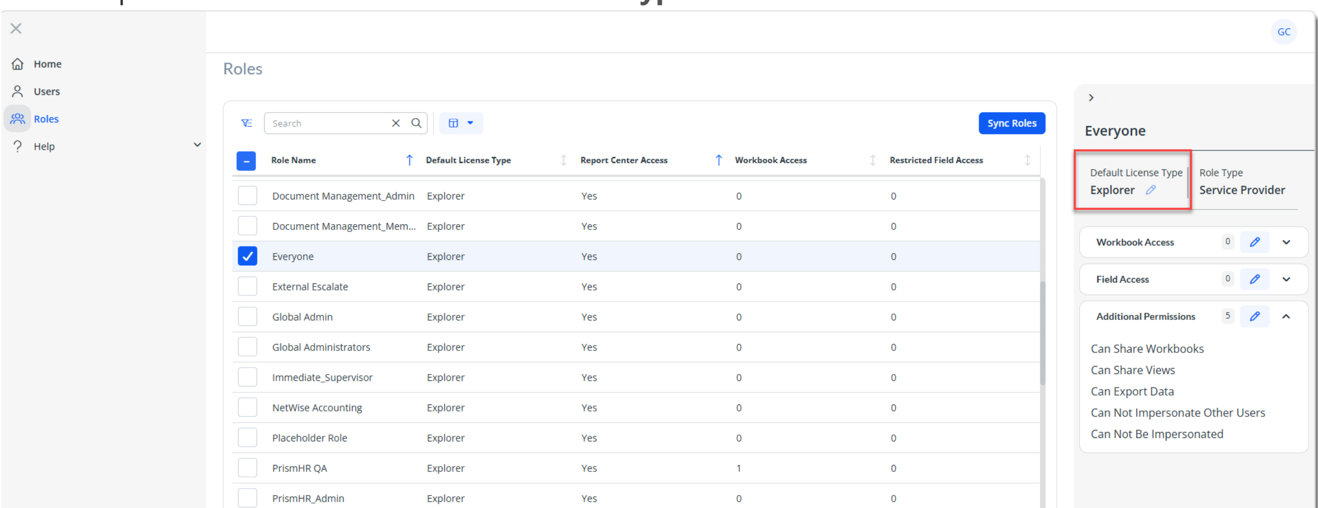
Assign License Types to Roles and Manage Workbook Access

For simplicity, if everyone in your organization can access the same reports, you can use the **Everyone** role to assign the **Default License Type** to all users and assign them the same reports. Keep in mind, however, that the Everyone role applies to internal and external users. If you have external users that should not have access to certain reports, do not use the **Everyone** role.

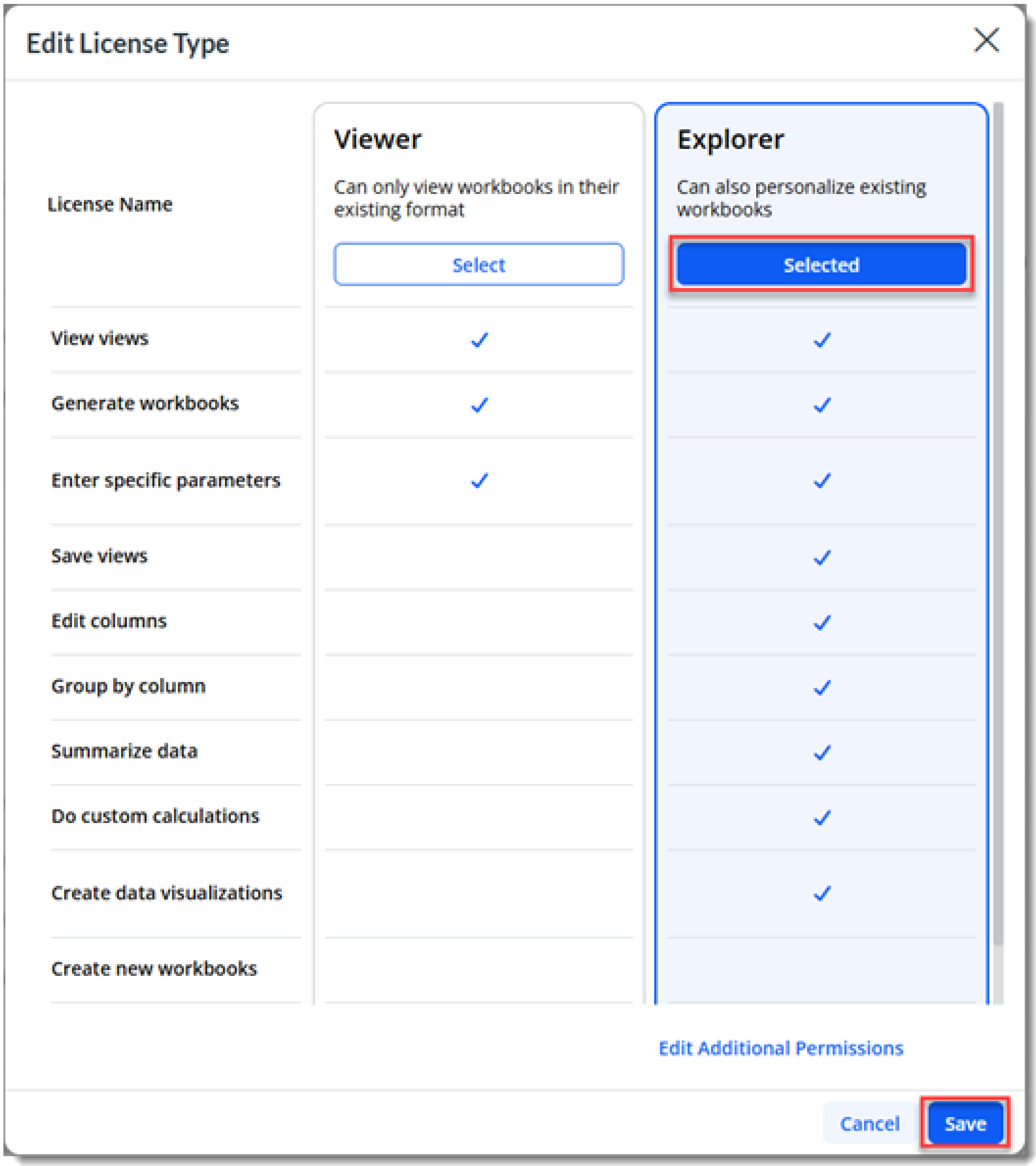
Depending on your configuration, you may have role named **PEO Employees** or **Your Site Employees**. One of these roles can be used to assign a **Default License Type** to all internal users.

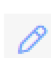
To assign license types to roles and manage workbook access:

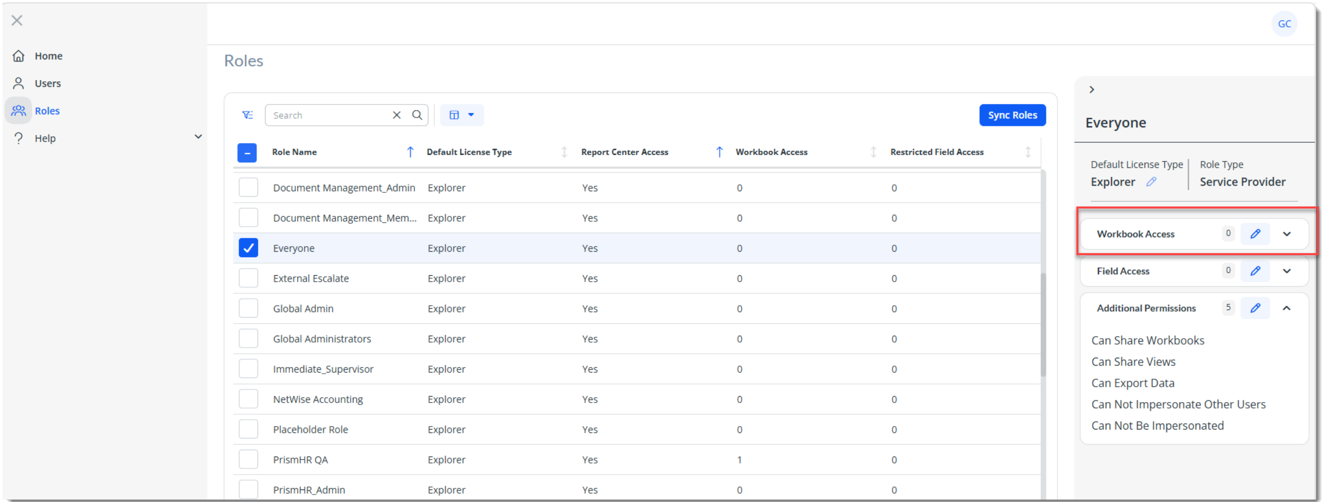
1. While still on the **Roles**  page, click the checkbox next to a role.
   The right panel displays role details and settings.
2. Click the pencil  icon under **Default License Type**.



   The Edit License Type window displays.
3. Click the **Select** button under the license type you want to assign.
   The button name text changes to "Selected".



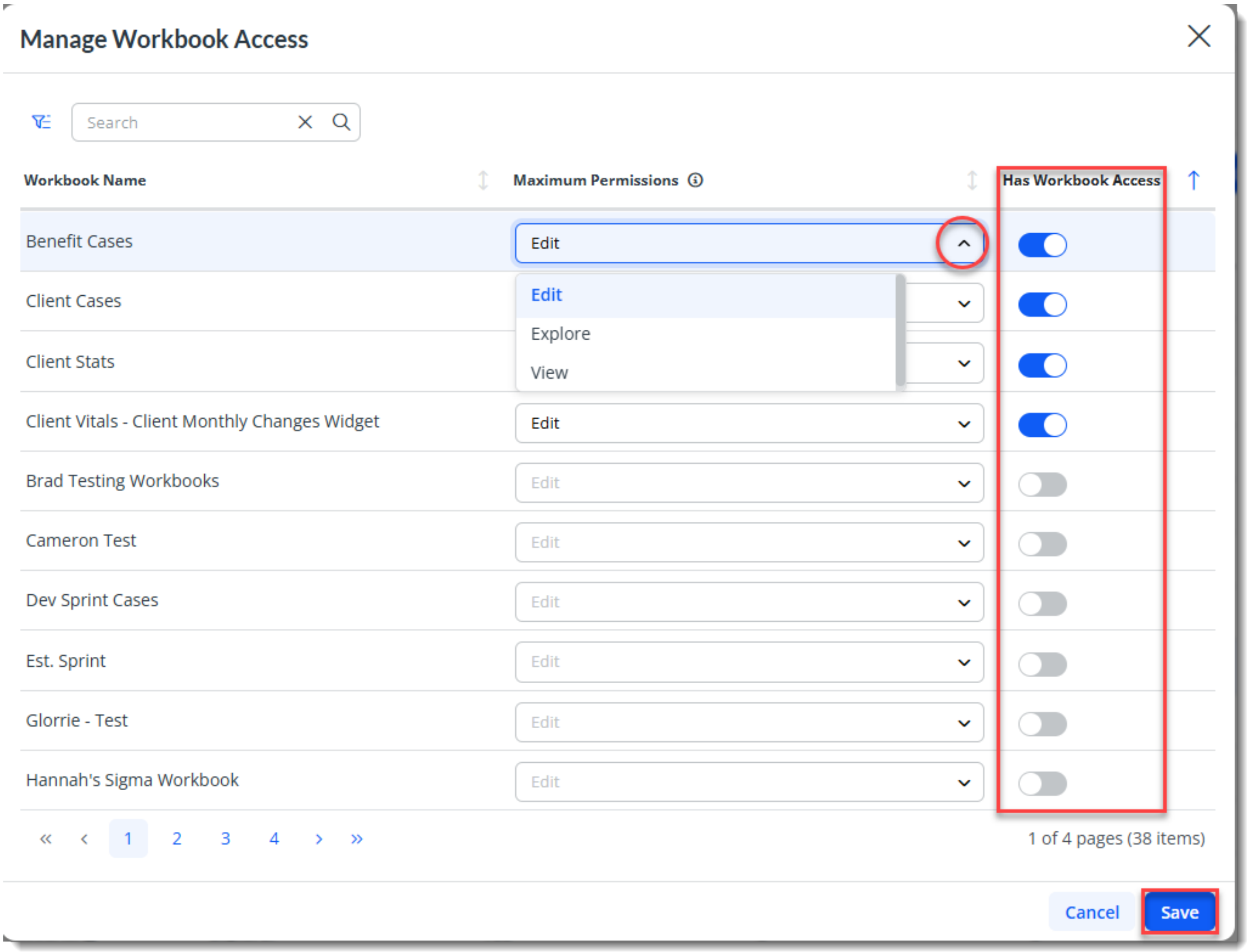
4. Click **Save**.
5. Click the pencil  icon next to **Workbook Access**.



The Manage Workbook Access window displays.

6. Click the **Has Workbook Access** slider button next to the roles where you want to enable access to this report. (A **blue** button background indicates that access is enabled. A **gray** button background indicates access is disabled.)

   You can also adjust the default **Maximum Permissions** on a report-by-report basis. By default, role members have access associated with their Default License Type for each workbook where access has been granted but you can edit this.

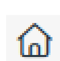


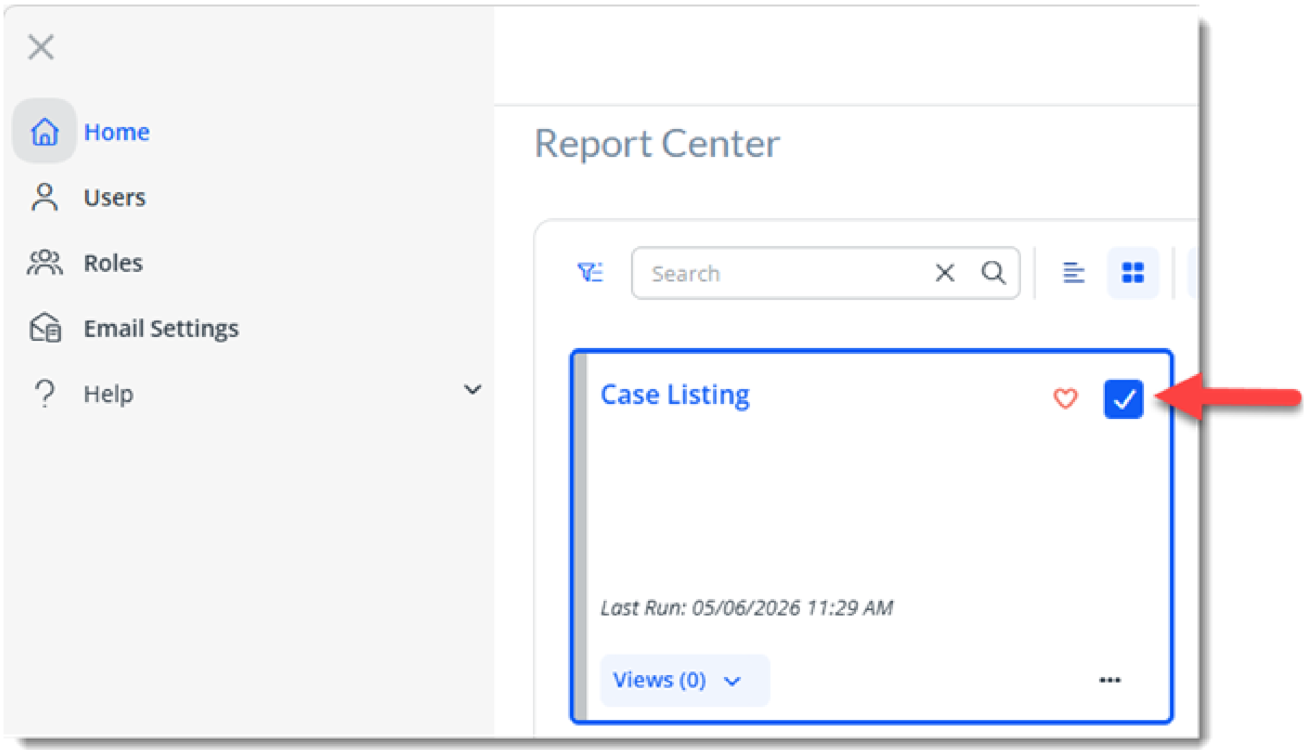
7. Click **Save**.

Assign Role Access to Reports

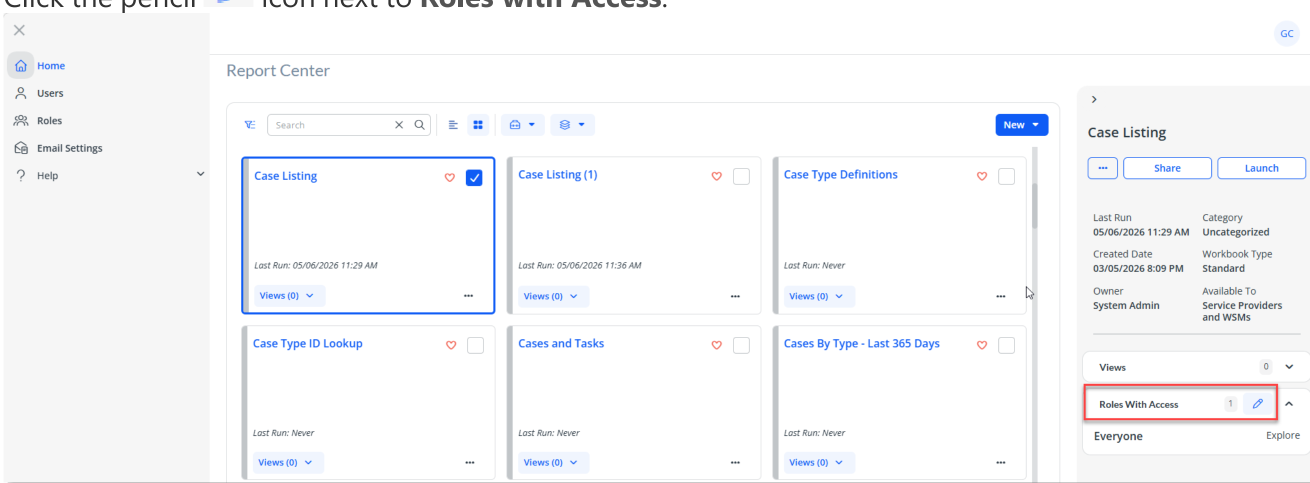
You can also assign roles to workbooks. If you add a new report, for instance, and there are multiple roles that require access to the report, you can locate the report tile and assign roles to it.

To assign role access to ClientSpace reports:

1. On the Report Center **Home**  page, locate an "out of box" report such as the Case Listing tile (by using the **Search** bar at the top of the page or by scrolling the list of available reports).
2. Click the checkbox on the report tile to select it.
   The right panel displays report details and settings.

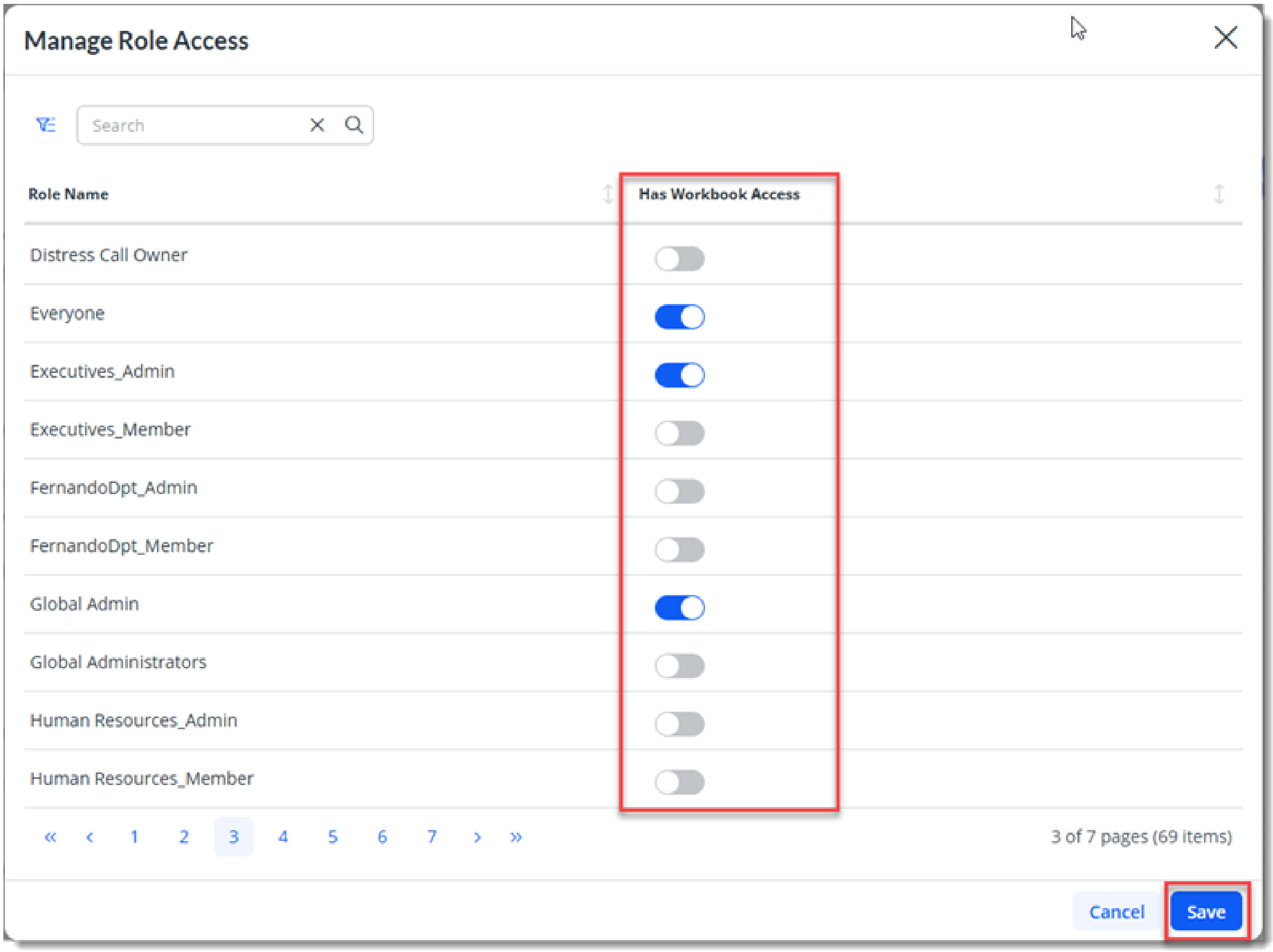


3. Click the pencil  icon next to **Roles with Access**.



The Manage Role Access window displays.

4. Click the **Has Workbook Access** slider button next to the roles where you want to enable access to this report. (A **blue** button background indicates that access is enabled. A gray button background indicates access is disabled.)



5. Click **Save**.

Report Center User Maintenance

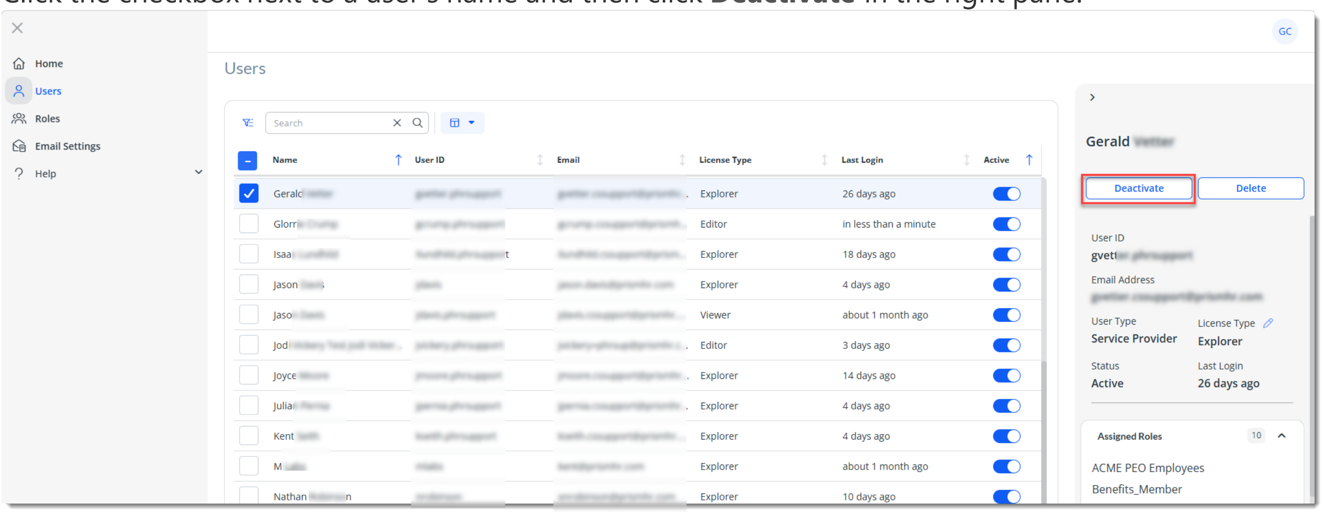
When a user is inactivated, expired or deleted in ClientSpace, they remain active in Report Center until a Report Center Administrator deactivates the user. Deactivated users remain in the Report Center Users list and can be reactivated later if needed.

Deactivating a Report Center User

To deactivate a user in Report Center:

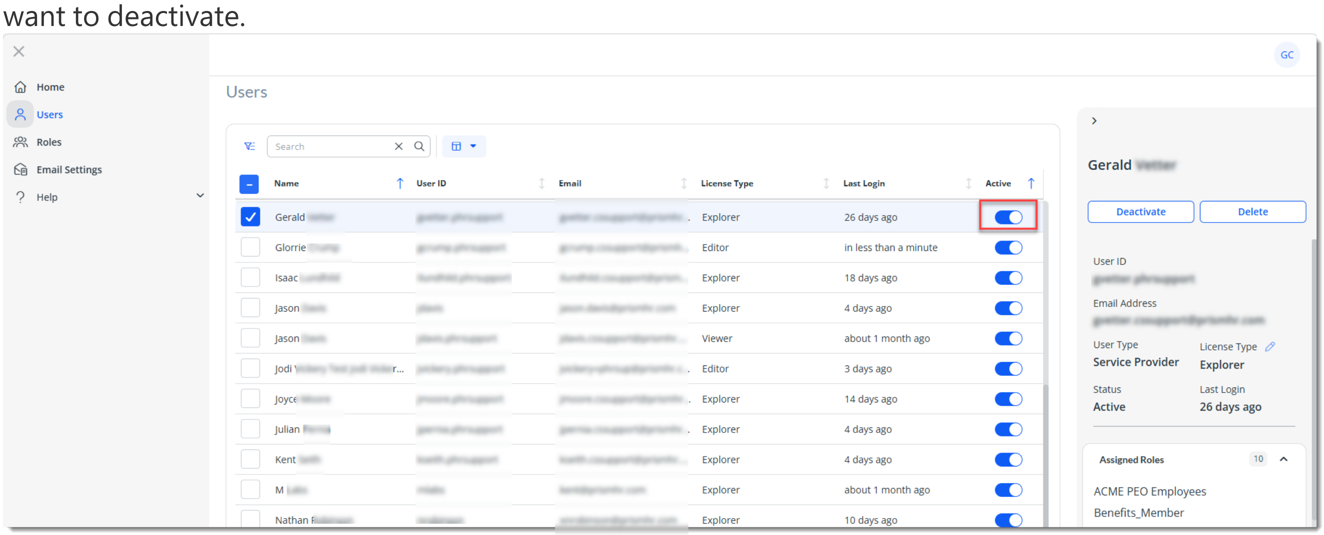
1. Click **Report Center** on the on the ClientSpace menu bar.

2. Select **Users** in the left pane.
3. Click the checkbox next to a user's name and then click **Deactivate** in the right pane.

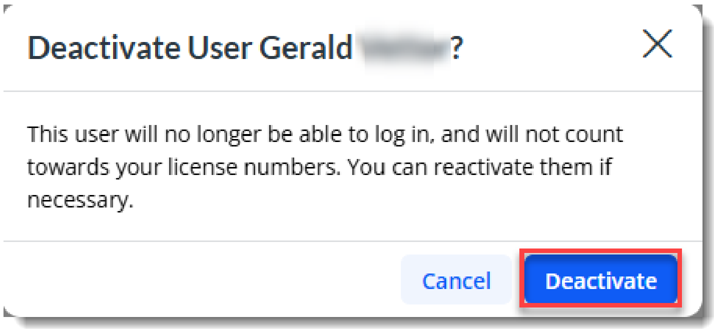


OR

Click the toggle button in the **Active** column of the Users grid on the line item of the user you want to deactivate.



A Deactivate User confirmation message displays.



4. Click **Deactivate**.

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Chapter 3

Getting Started with Report Center

In this section, you will learn how to learn how to:

- Access the Report Center Help
- Review and Edit a Simple Report
- Special Note on ClientSpace Editor Fields in Report Center
- Saving and Sharing Views
- Saving a Copy of a Workbook
- Flagging Favorite Reports
- Creating ClientSpace Widgets Using Report Center Workbooks or Views
- Creating ClientSpace Custom Dataform Links Using Report Center Workbooks or Views
- Adding Custom Forms and Fields to Reports

Also included in this section:

- Frequently Asked Questions

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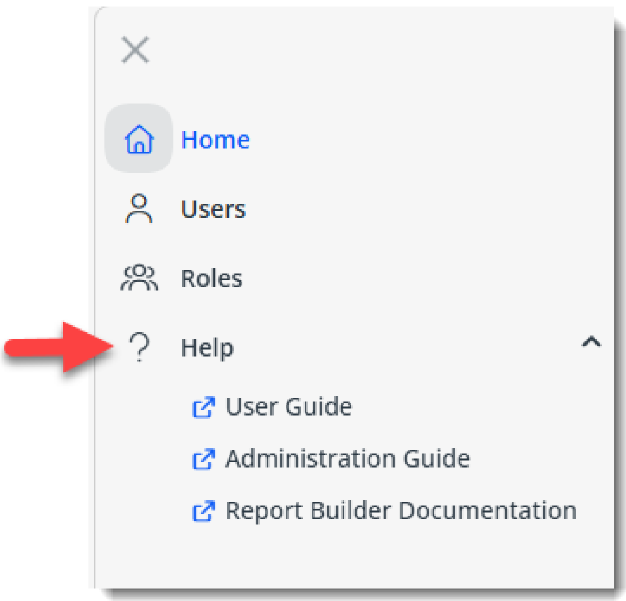
Accessing Report Center Help and Videos

Report Center Online Help

To access Report Center Help documentation, open Report Center and click the **Help** icon in the left navigation panel.



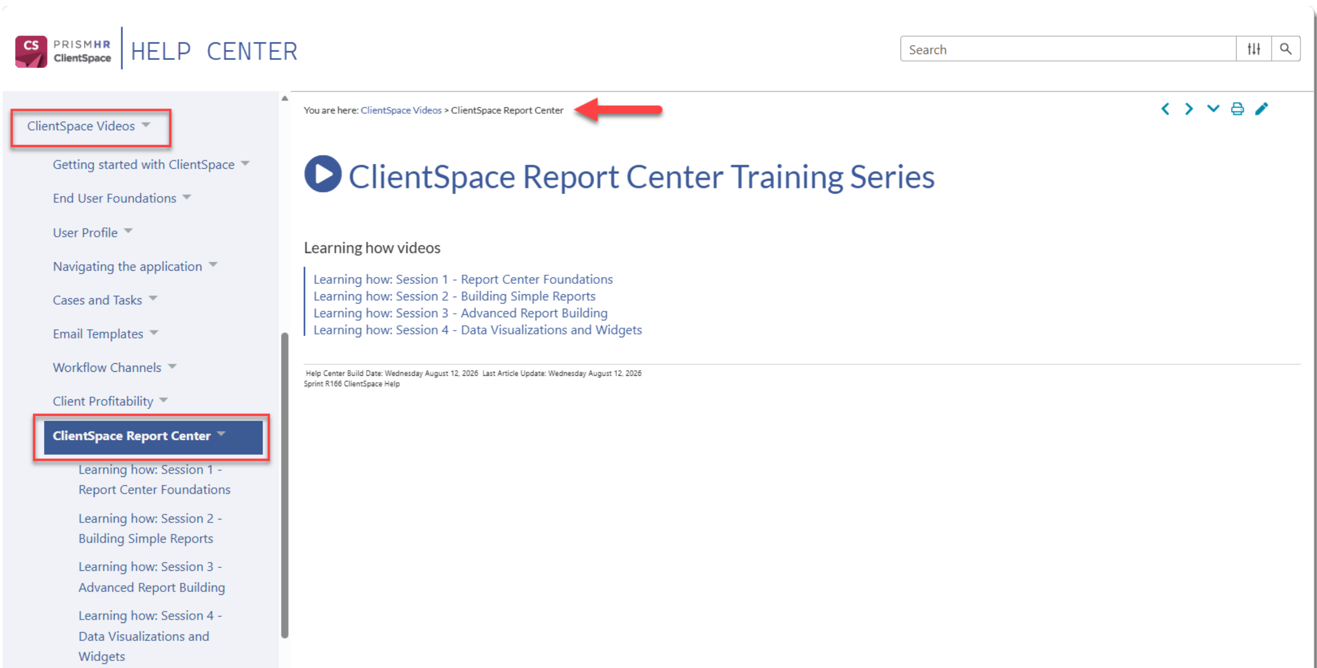
Three **Help** links display in the Report Center application:

- **User Guide** - Contains guidance on navigating in Report Center, Report Center features and terminology, viewing reports, editing reports in **Explore** mode, and creating/publishing workbooks.
- **Administration Guide** - Contains the same information as the User Guide but with additional details throughout which are specific to Report Center Administrators. Also contains a dedicated section on user, role and permissions administration.
- **Report Builder Documentation** - This extensive Help library contains detailed documentation on how to use Sigma Report Center to analyze your data, work with data sources and data models, create joins in workbooks, build reports from workbooks, share and export reports and more.
  Note: Be sure to check out the function index in the Report Builder Documentation! Sigma supports over 200 functions that allow you to perform calculations, transformations and extractions on your data. If you are viewing this guide as a PDF, simply click this link: Report Center Function Index.

Otherwise, select the **Report Builder Documentation** link in Report Center and search for "Function index".

ClientSpace Report Center Training Video Series

In addition to the Report Center online Help, you can also access the ClientSpace Report Center Training Series in the ClientSpace Help Center from **ClientSpace Videos > ClientSpace Report Center**:



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Reviewing and Editing a Simple Report

To begin familiarizing yourself with Report Center, we recommend that you begin by reviewing some of the existing out-of-the-box ClientSpace reports. A good starting place is a simple report such as the **Cases By Type - Last 365 Days** workbook.

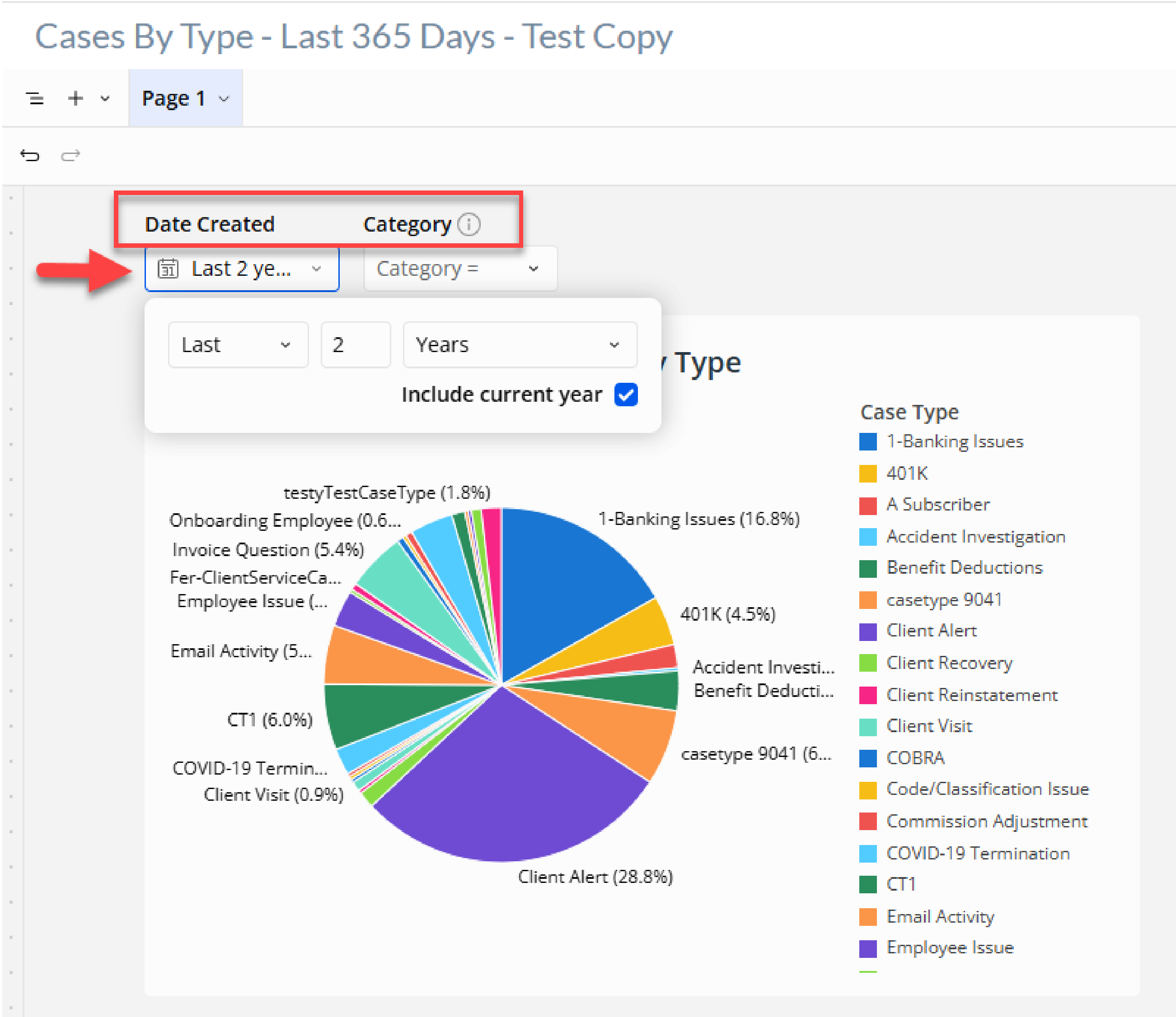
Note:

- You must have Explorer or Editor access to perform some of the tasks outlined in this topic. **Remember:** An **Editor** license type is required to view and personalize existing workbooks plus create new workbooks and use "join tables" functionality. An **Editor** can also change the base workbook file. An **Explorer** license type allows users to view and personalize existing workbooks. However, they cannot change the base workbook file. They can instead save a workbook view and then personalize it.

- A Sigma workbook is the primary, saved container for data analysis (data, charts, and layout) acting as the "single source of truth". A workbook view (also referred to as a custom view) is a personalized layer built on top of a published workbook, allowing users to filter, sort, or explore data without altering the original, shared workbook. Therefore, users with **Editor** access can alter the "source" which impacts all related views.

Reviewing Filters

Filters display at the top of charts. The **Cases By Type - Last 365 Days** report has a pie chart which displays **Date Created** = Last 2 years, including current year and all case categories are checked under **Category**.



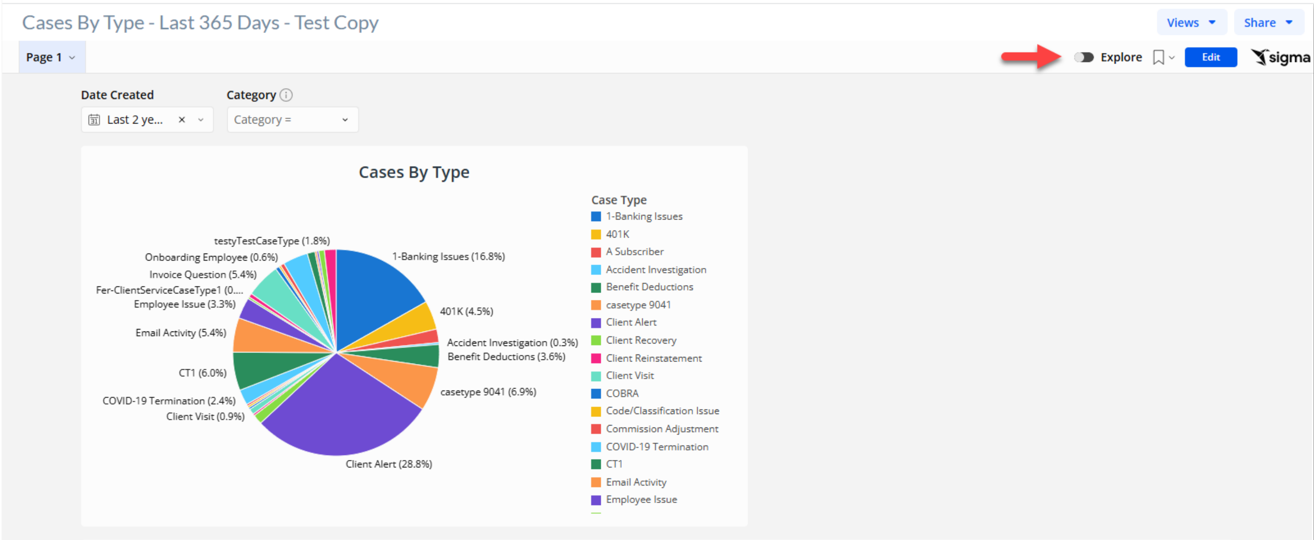
Experiment with opening the drop-down list and setting a different **Date Created** filter or removing some of the **Category** options.

Adding a Custom Field

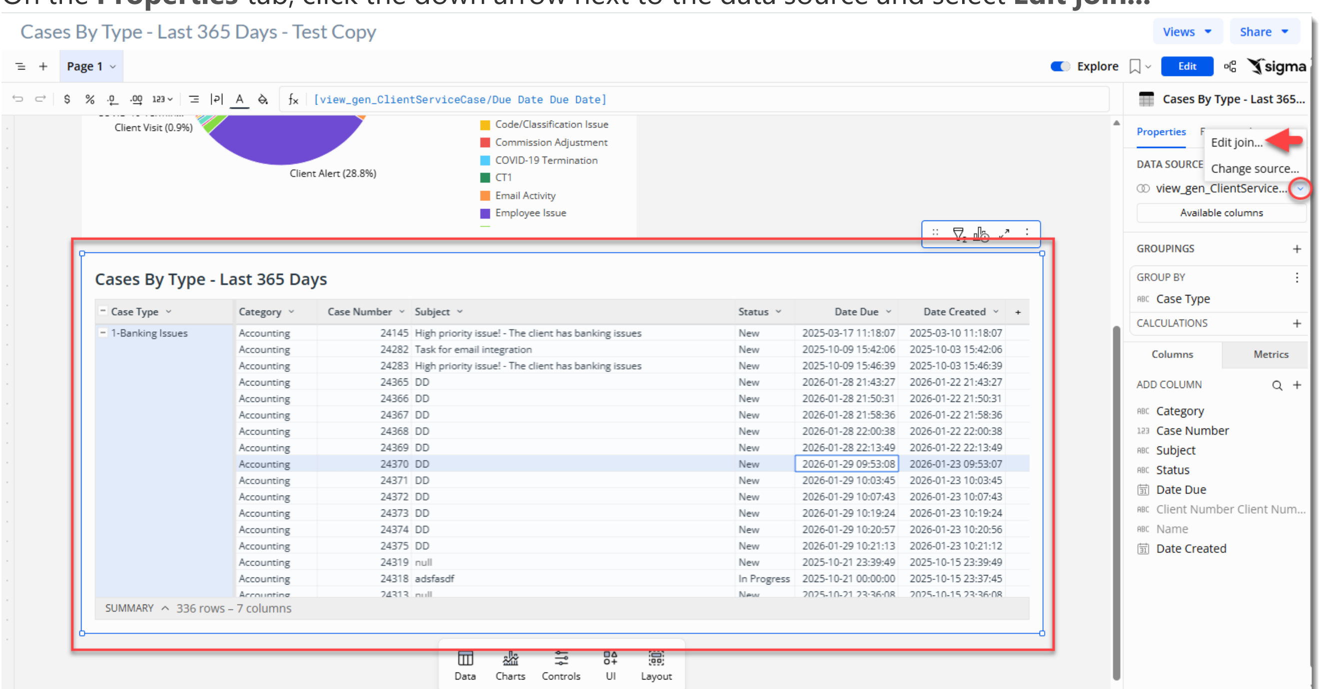
In ClientSpace, with Izenda reporting, our out-of-the box reports could not contain any custom fields that you created. The data models containing the fields we created had to be maintained separately from fields created by your agency. This section covers how to modify an out-of-the box or "canned" report to point to a datasource containing custom fields and then add a custom field to the report.

To add a custom field to the report:

1. With the workbook open, click the **Explore** slider button to enter Explore mode.



2. Click the Cases by Type - Last 365 Days grid (located beneath the pie chart) to select the element. A right pane displays the **Properties**, **Format** and **Actions** tab.
3. On the **Properties** tab, click the down arrow next to the data source and select **Edit join...**

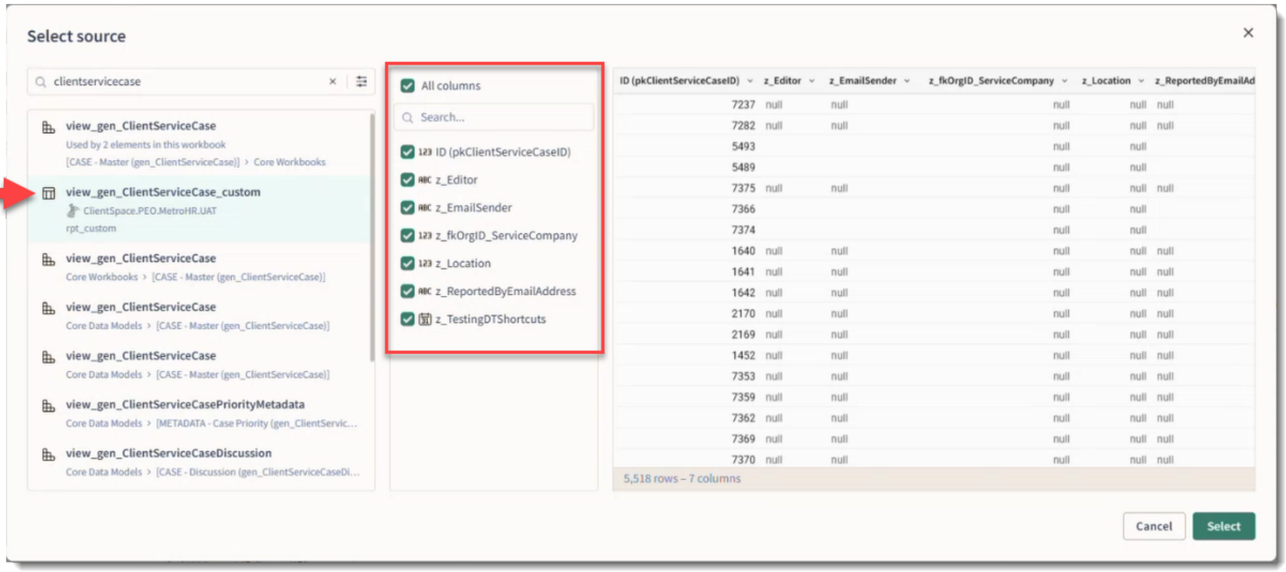


4. Click the plus symbol next to `SOURCES`.

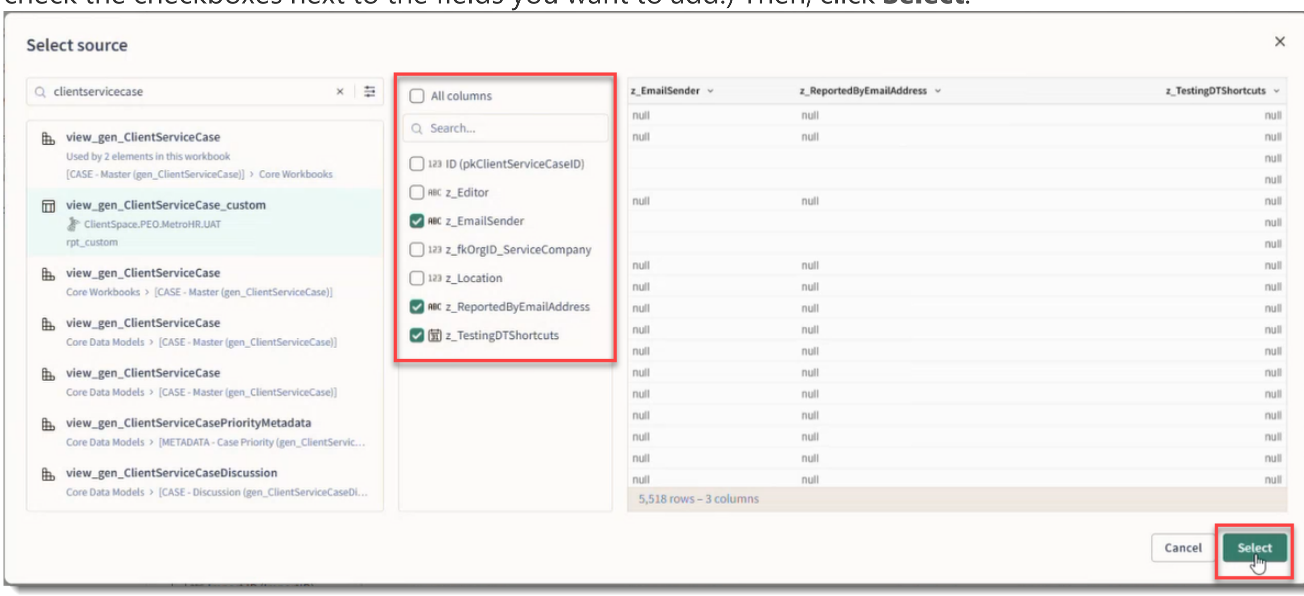
The Select Source window displays.

5. Type *clientservicecase* in the **Search for data sources, or current workbook element** field.
A list of matches displays on the **Suggested** tab. If you do not see the data source you are looking for, you can click the **Elements** and **Data Sources** tab to look at other options. However, in this test, we will select a **Suggested** source. Note that the icon next to a data source indicates a ClientSpace data model used for a "canned" report containing no custom fields while the icon is used to indicate a view or table containing custom fields. The view name will typically end with "_custom".

6. For this test, we will click the custom view named **view_gen_ClientServiceCase_custom** to select it. (If you do not have this view, you can select a different custom view for testing purposes.)
Note that when you select the custom view, the Primary Key as well as all custom fields (beginning with "z_") are listed. Additionally, a snapshot of data in the fields displays in the grid located to the right of the field listing. The presence of "null" indicates no data in the fields, which may indicate a newly created field where no data exists yet.

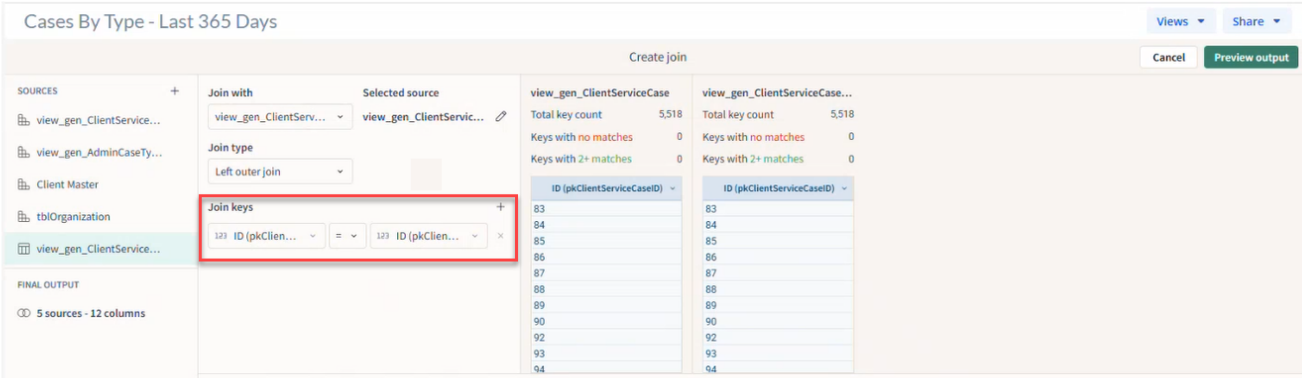


7. Uncheck the checkboxes next to the fields you do not want to add (or uncheck **All columns** and check the checkboxes next to the fields you want to add.) Then, click **Select**.

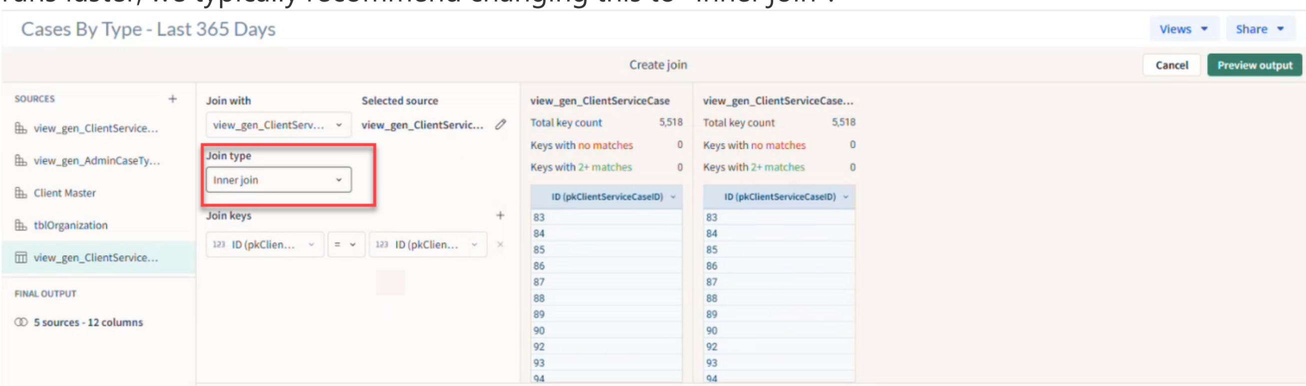


The join configuration fields display along with Join Output table below it. The Join Output table displays the columns being used in the join, including the columns you just added.

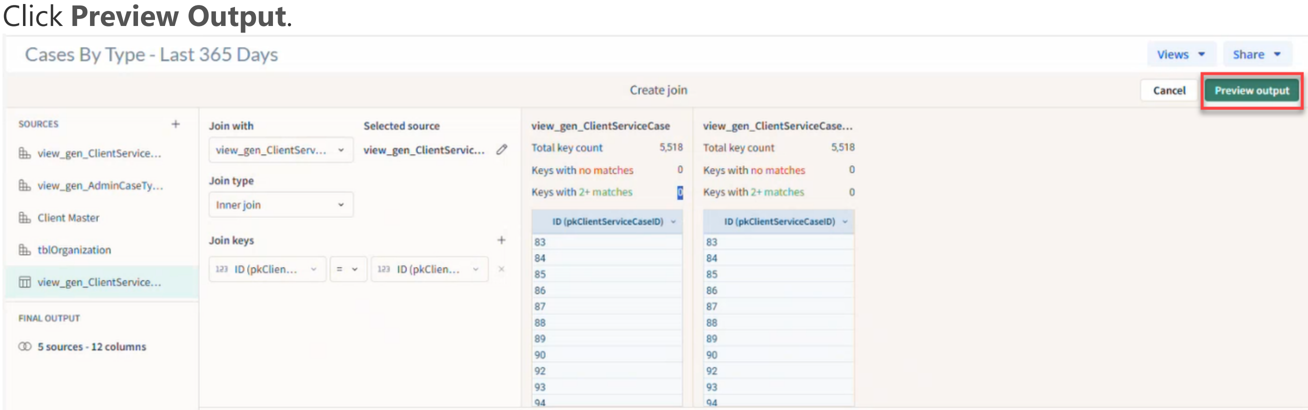
8. Review the **Join keys**.
   Notice that Report Center attempts to create the join for you. In this case, it found the relationship between the primary key fields in both the original source and the newly added source and filled in the **Join Keys**. When Primary Key naming conventions are consistent, this "auto assist" works. Therefore, in this instance, we will keep the settings. However, you should always review **Join keys** and make manual changes as necessary.



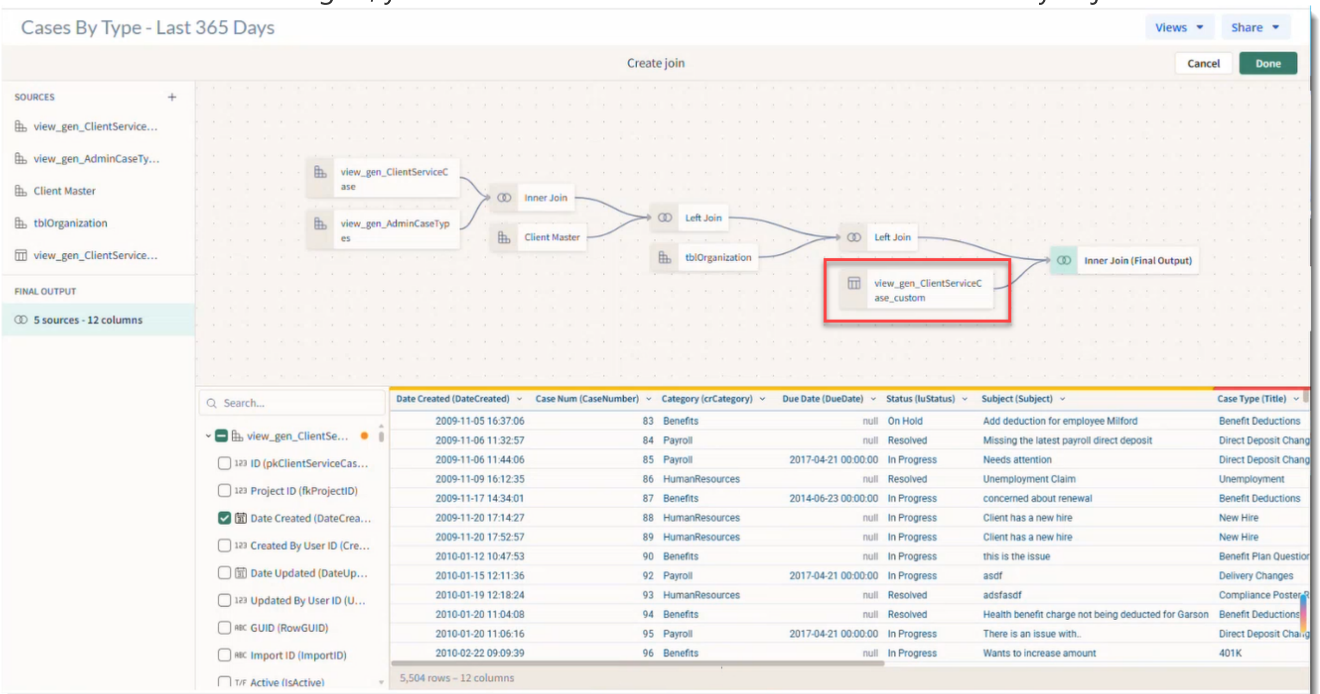
9. Review the **Join type**.
Report Center has automatically set join type to "Left outer join". For a more efficient report that runs faster, we typically recommend changing this to "Inner join".



10. Review the **Total key count**. Notice in the example screenshot above that there is a one-to-one match of the **Total key count** for both the data model and the custom data source. For both data sources, there are no keys with no matches and no keys with more than two matches. There is one row for each record in both tables. This is indicative of a healthy join.
11. Click **Preview Output**.



A join diagram is generated which includes the new custom datasource. A preview of the data with the join settings applied is also displayed in the bottom grid. If you use the horizontal scroll bar at the bottom of the grid, you can view the data associated with the columns you just added.



12. Click **Done** to close the diagram. This takes you back to the tab which displays the pie chart and grid.

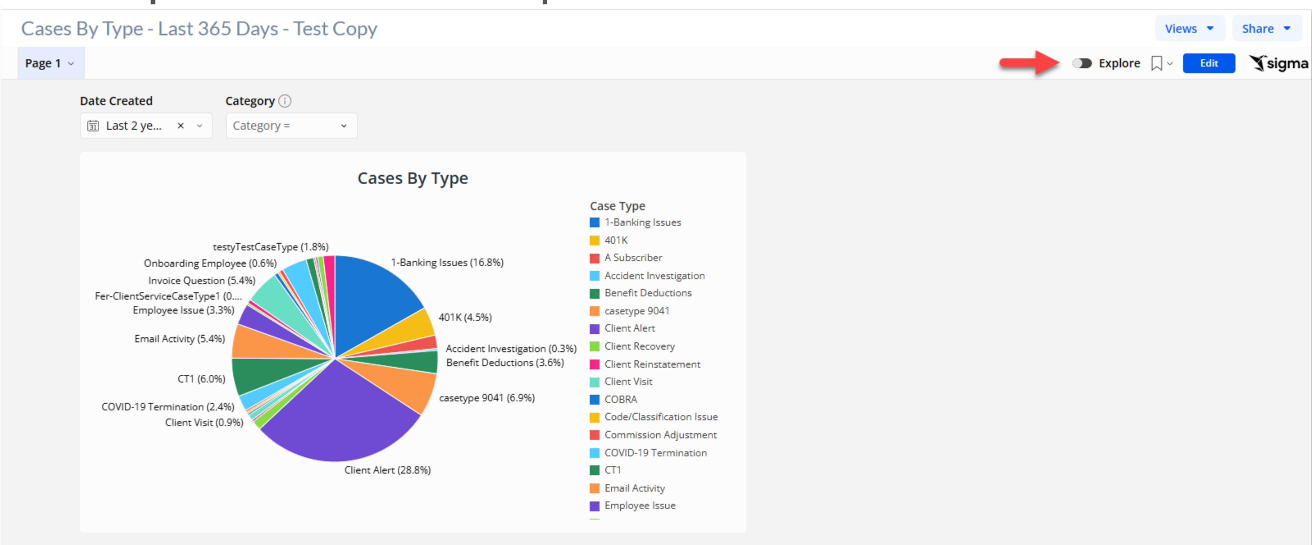
Adding Custom Forms and Fields to Reports

The data sources for custom forms and fields are stored under your connection. This topic covers how to select a new data source containing custom forms or fields on existing report elements and new report elements.

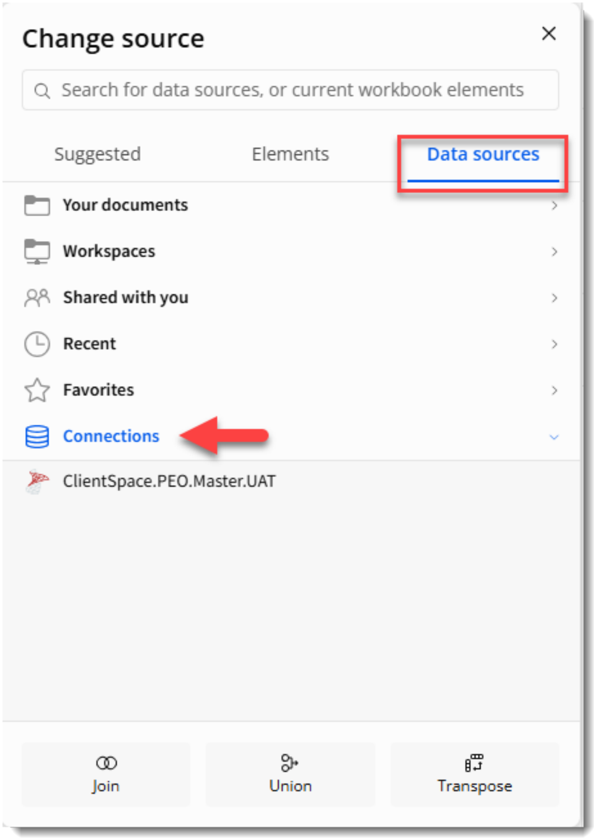
Changing an Existing Data Source on a Report Element

To change an existing datasource to use a custom data source:

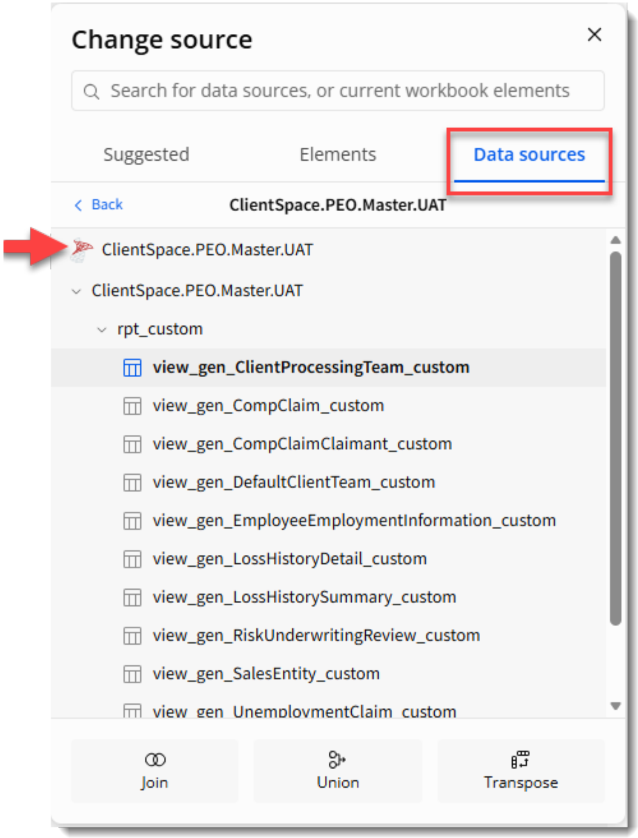
1. On the Report Center **Home**  page, locate the report tile (by using the **Search** bar at the top of the page or by scrolling the list of available reports).
2. Click the **blue** report title link to open the report.
3. Click the **Explore** slider button to enter **Explore** mode.



4. Click an element on the report to select it.
5. On the **Properties** tab, under `DATA SOURCE`, click the down arrow and select **Change Source**.
6. On the Change Source window, click the **Data sources** tab and then click **Connections**.



7. Click your connection and then click the arrows beneath it to expand the list of custom data sources.

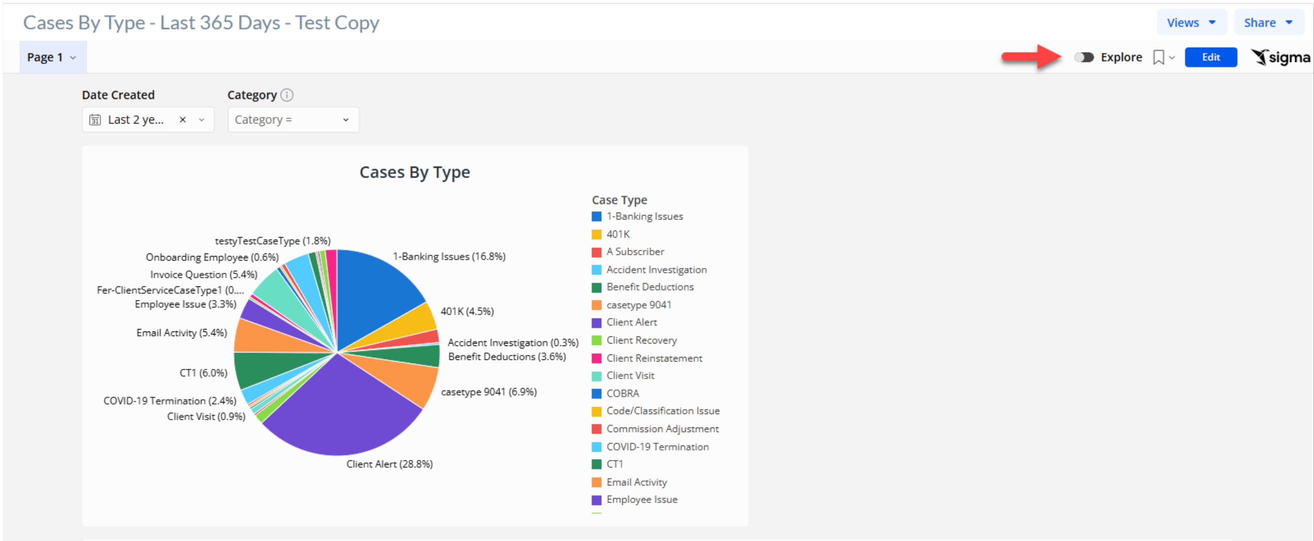


8. Click a data source to apply containing the custom fields or forms you want to use on the report.

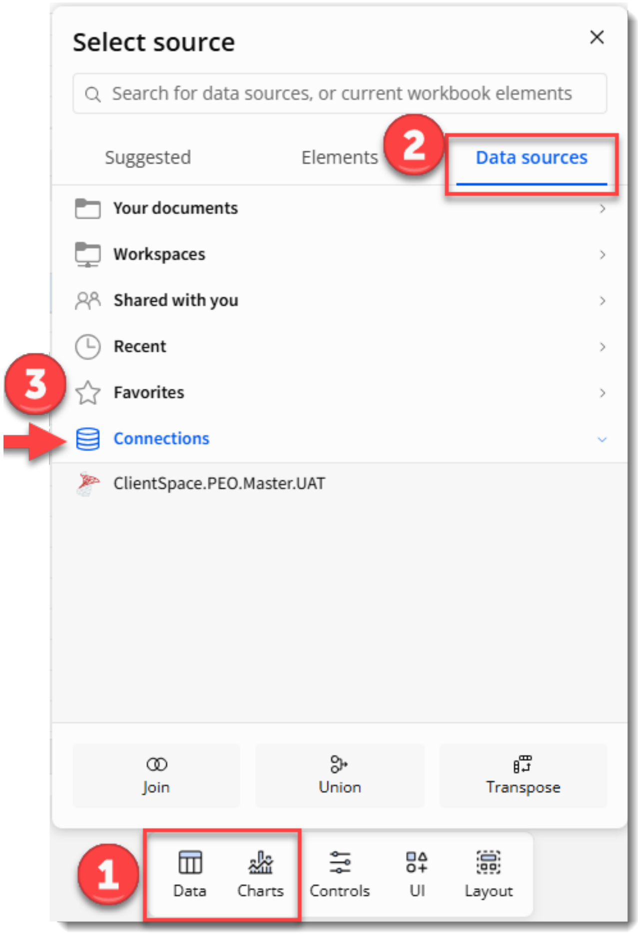
Adding a New Custom Data Source to a Report Element

To select a custom data source on a new Report Element

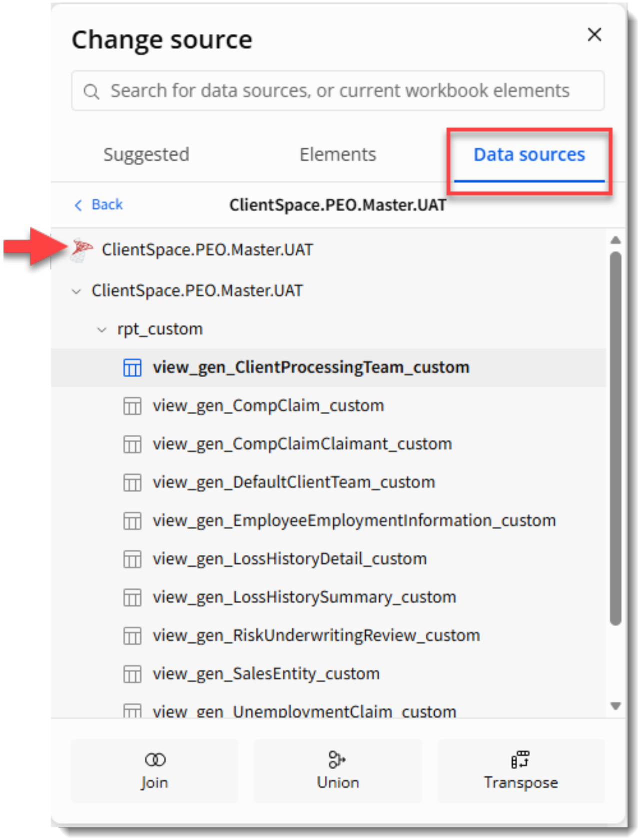
1. On the Report Center **Home**  page, locate the report tile (by using the **Search** bar at the top of the page or by scrolling the list of available reports).
2. Click the **blue** report title link to open the report.
3. Click the **Explore** slider button to enter **Explore** mode.



4. Select a new element type that relies on data (Data or Charts) from the menu at the bottom of the workbook.
5. When the Select Source window displays, click the **Data sources** tab and then click **Connections**.



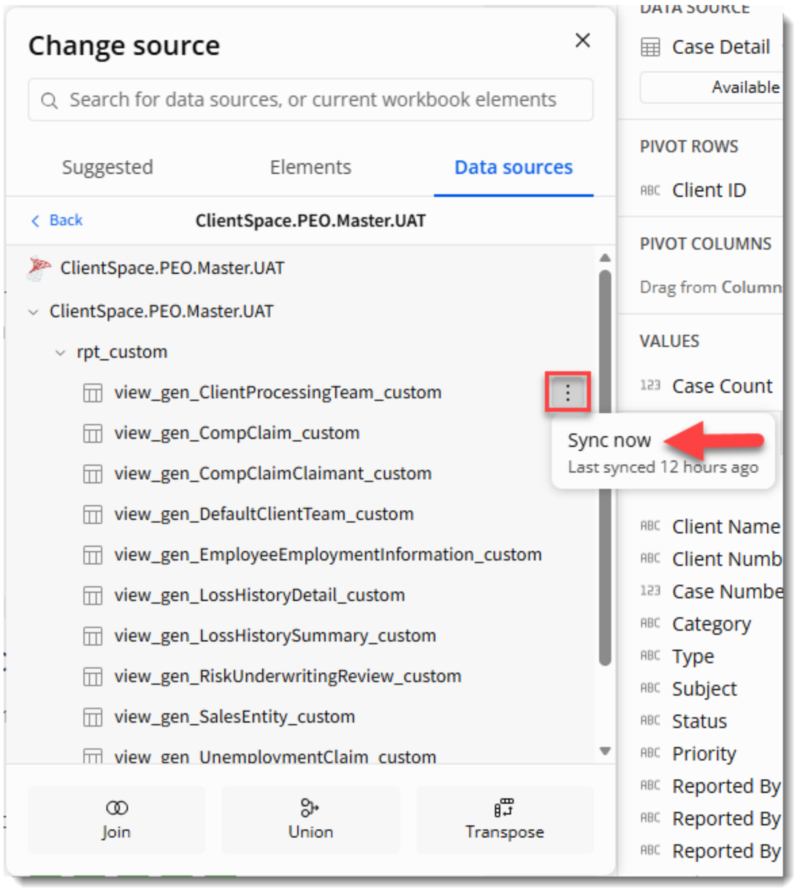
6. Click your connection and then click the arrows beneath it to expand the list of custom data sources.



7. Click a data source to apply containing the custom fields or forms you want to use on the report.

Tip: Getting New Custom Forms and Fields into Report Center Immediately

New custom forms and fields are added to the system overnight. To accelerate this process so that you can access them right away, click the vertical three dot menu (i.e., kebab)  icon next to the custom form name and select **Sync now**.



Saving and Sharing Views

A view is a related subset of the original report that you have edited and customized to your needs.

FAQ: Instead of creating a view, why not just create a copy of the report?

Answer: When you save the report as a view, it remains organized neatly under the original report (on the **Home** page workbook tile under the **Views** link). While there are cases where it is beneficial to save a copy of the report (such as when you want a report to become the "template" for an entirely different report or dashboard) if the changes you are making are related to the original report, your views (which are only visible to you unless you share them) stay organized with the original report and therefore are easier to find. For example, you might create variations of the Cases By Type report showing a specific **Type** such as "Client Alerts" and name it "Cases By Type - Client Alerts". Or you might create a view named "Cases By Type - New" which shows all cases with a **Status** of "New".

The additional benefit of views is that you can save the changes to a report without affecting the original report (i.e., base report). Unless you have an **Editor** license, you cannot overwrite base reports with changes. (Even with an **Editor** license, you may not want to overwrite the original report until you have vetted the changes thoroughly.)

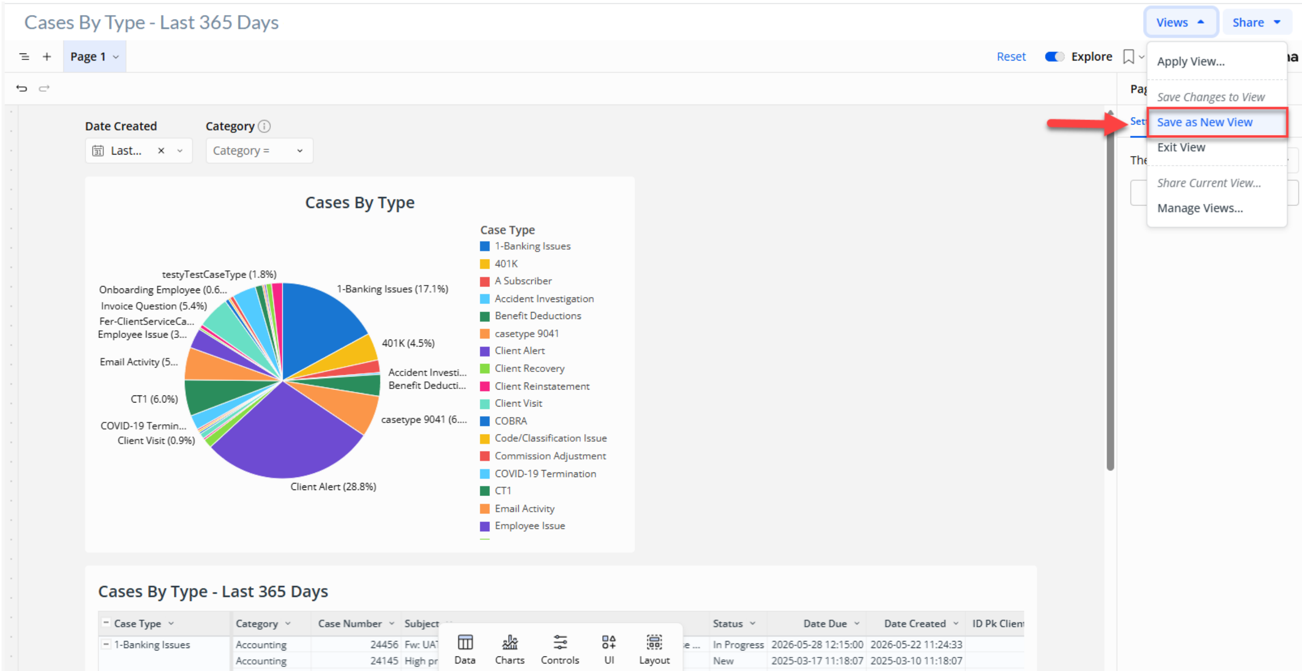
You also cannot edit "out of box reports". This is important because it allows us to maintain the integrity of the standard reports. If we update them, they do not overwrite your views. Your view may change, however, depending on changes we make. For instance, if we rename a field, the new field name will display in your view. With views, you can maintain your own custom reports while allowing us to maintain the original reports.

Therefore, the solution for those with **Editor** license types who want to preserve the original report, for **Explorer** license types who do not have access to overwrite a base report or for any **Explorer** or **Editor** who wants to personalize an "out of box" report is to save a view. The view becomes a workbook that you own, can edit freely and can share.

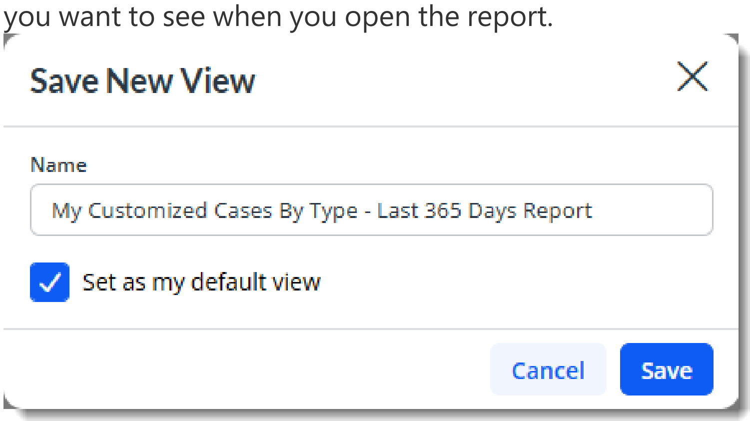
Saving a View

To save a view:

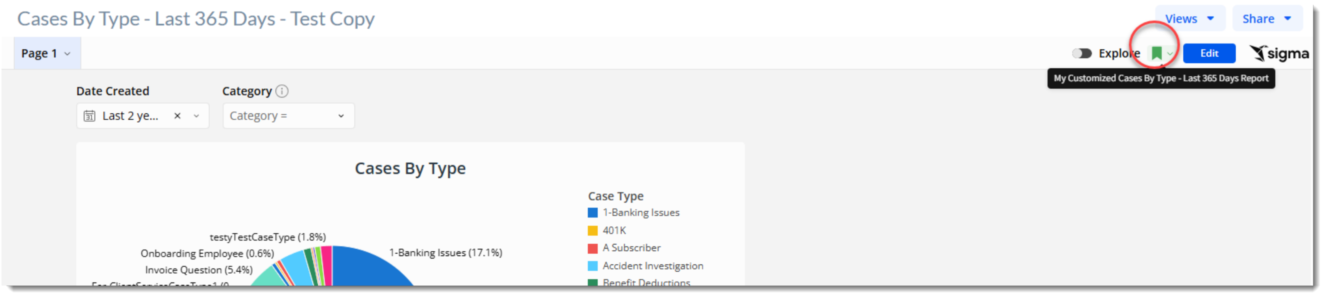
1. On the Report Center **Home** page, locate the report tile (by using the **Search** bar at the top of the page or by scrolling the list of available reports).
2. Click the **blue** report title link to open the workbook.
3. Click **Views** > **Save as New View**.
   The Save New View popup window displays.



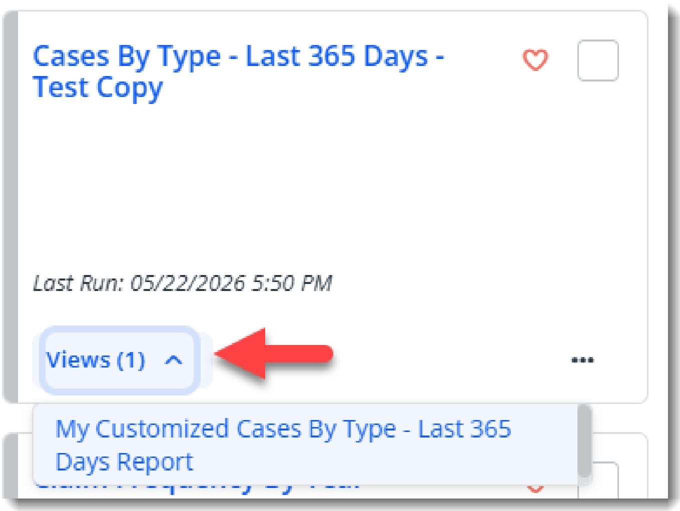
4. Enter the view **Name** and optionally, click the **Set as my default view** checkbox if this is the view you want to see when you open the report.



5. Click **Save**.
If you have set the view as your default view, the next time you open the workbook, the view will open and you will see a green tag next to the **Explore** field. This indicates that you are looking at a saved subset or view of the report. Hovering your mouse pointer over the tag displays the name of the view:



Additionally, views that you have created (or received access to when a view created by someone was shared with you) are organized under the Views listing on the **Home** page report tile:

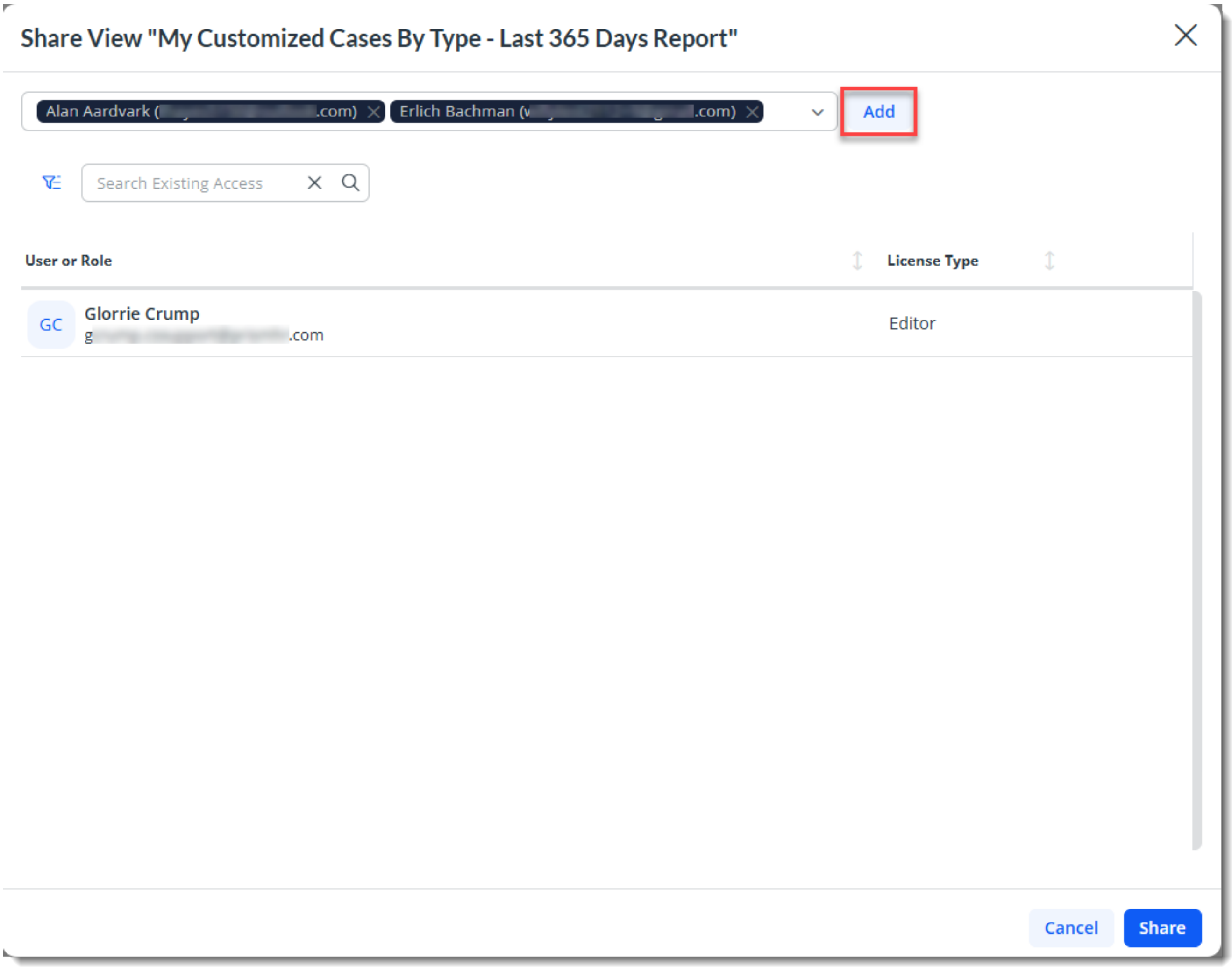


Sharing a View

Once you create the view, you can share it with other Report Center users.

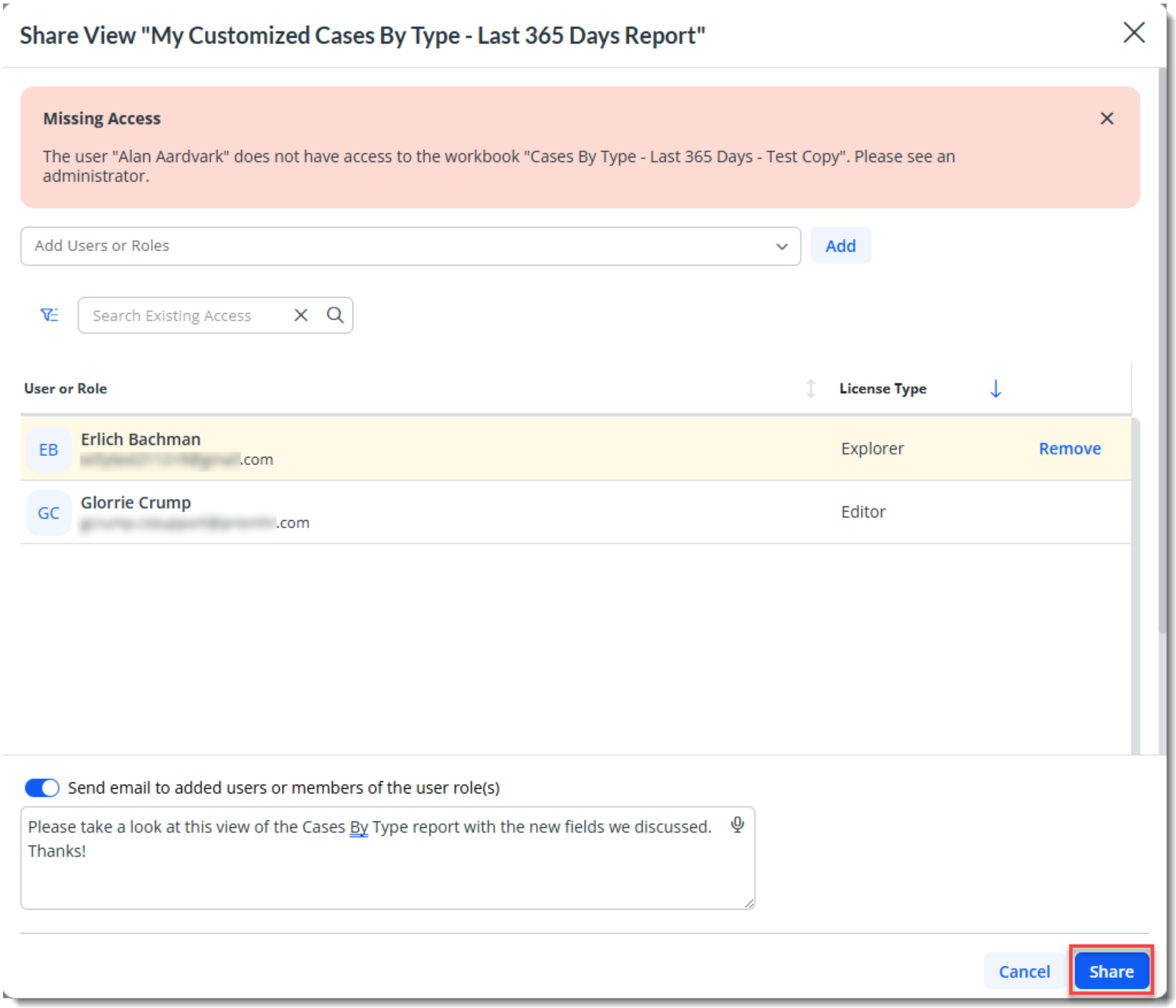
To share a view:

1. Click **Views** > **Share Current View...** or **Share** > **Current View**.
2. The Share View window displays.
3. In the first search field, you can search for and add multiple users to whom you will grant access to the view. In the second search list, you can filter a list of users with existing access to determine if you have already granted them access.
4. Click **Add** to grant access to the users shown in the first search field.
   Note: The users must have access to the workbook to be granted access to any subset (i.e., view) of the workbook. A "Missing Access" message displays if the user does not have access. This message will not stop you from being able to share the view with the remaining users or roles selected, however.



Each user or role is added with the same level of access they have to the originating workbook.

5. By default, the **Send email to added users or members of the user role(s) option is selected** to notify users or role members that they have been granted access to the view.
6. Optionally, enter a brief message for the email notification recipients.
7. Click **Share**.



Saving a Copy of a Workbook

You have the option of saving a copy of the workbook instead of saving a view. This is often done when you want to use an existing workbook as the basis for an *entirely different report* whereas a view is a related *subset of the same report*. **Note:** When a view will suffice, we do not recommend saving copies of workbooks in place of creating views as views keep related report subsets tidy and manageable on the **Home** page on the original workbook tile under the **Views** link.

To save a copy of the workbook:

1. On the Report Center **Home** page and locate the report tile (by using the **Search** bar at the top of the page or by scrolling the list of available reports).
2. Click the **blue** report title link to open the workbook.
3. Click **Save As** in the top right corner of the workbook.
4. In the **Name** field, you can accept the default name of the report (which is the name of the original report with the number of the copy behind it in parentheses) but we recommend renaming it to reflect its use.
   For instance, if the report is a test copy that you will be using to experiment with, you can append "Test Copy" to the end of it.
   If the report is being used as a template for a brand-new report, enter the new report name instead.
   You may also be prompted to update data sources for the report.
5. Click **Select All** and **Update** to use the same datasources used by the original report. You can edit the data sources later when you customize the report.

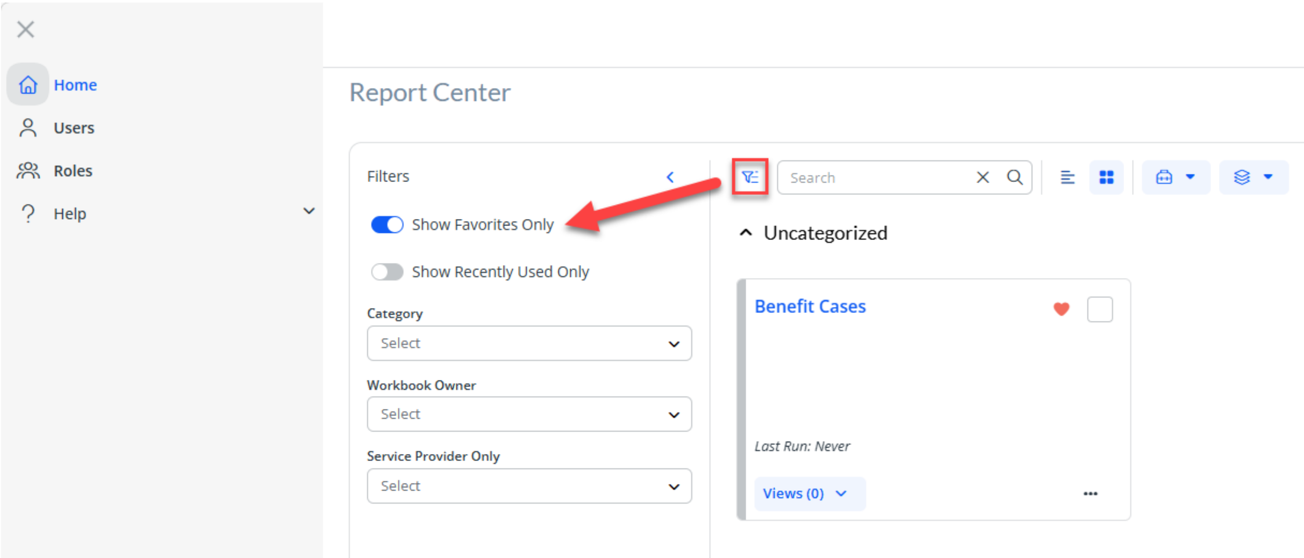
Flagging Favorite Reports

Note: All ClientSpace reports are currently held in an "Uncategorized" container within Report Center. We are working on adding the ability to place reports in categories. Setting favorite reports may help organize reports in the interim by reducing searches for frequently accessed reports.

To flag Favorite reports:

1. On the Report Center **Home** page, locate the report tile (by using the **Search** bar at the top of the page or by scrolling the list of available reports).
2. Click the **Favorite** icon on the report tile. The **Favorite**icon becomes solid red.
3. Optionally, filter the report list to show only favorites by clicking the **Filters** icon located next

to the **Search** field to display report filter options and then selecting **Show Favorites Only**.



Creating ClientSpace Widgets Using Report Center Workbooks or Views

This article will show you how to get the embed code from a Report Center workbook or view and add it to a ClientSpace custom widget.

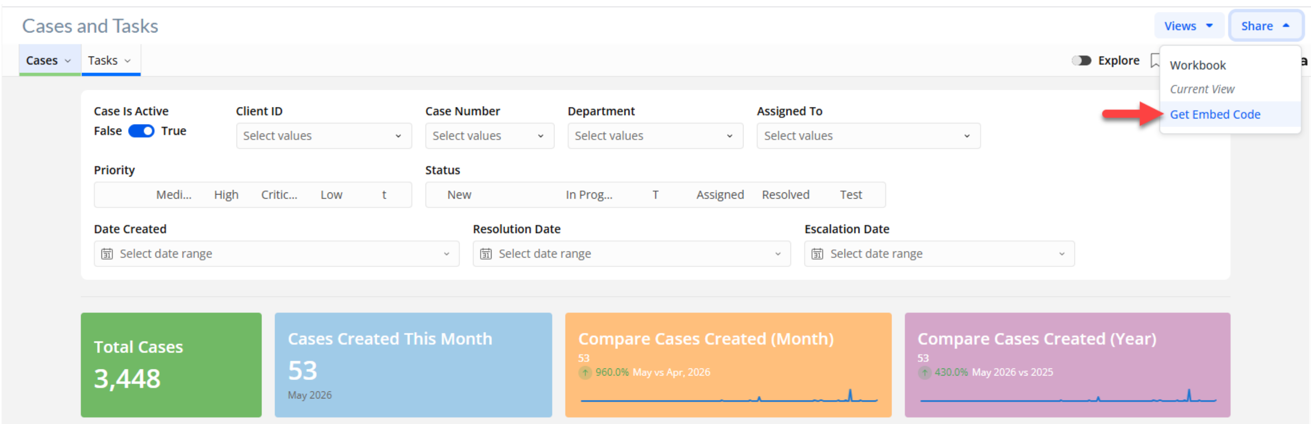
Note:

- You can only get the embed code on Report Center workbooks or views that you are authorized to access.
- You have the option of embedding the entire report or elements of the report such as a graph, chart or data grid.
- Any interactive filter drop-down lists you may have added to the report or report element in Report Center are still functional within ClientSpace.
- Once the report link is clicked:
  - The report renders based on the viewer's security and role permissions.
  - The report displays in the ClientSpace left navigation as a work item.

Step 1: Copy the Embed Code from Report Center

To copy the embed code:

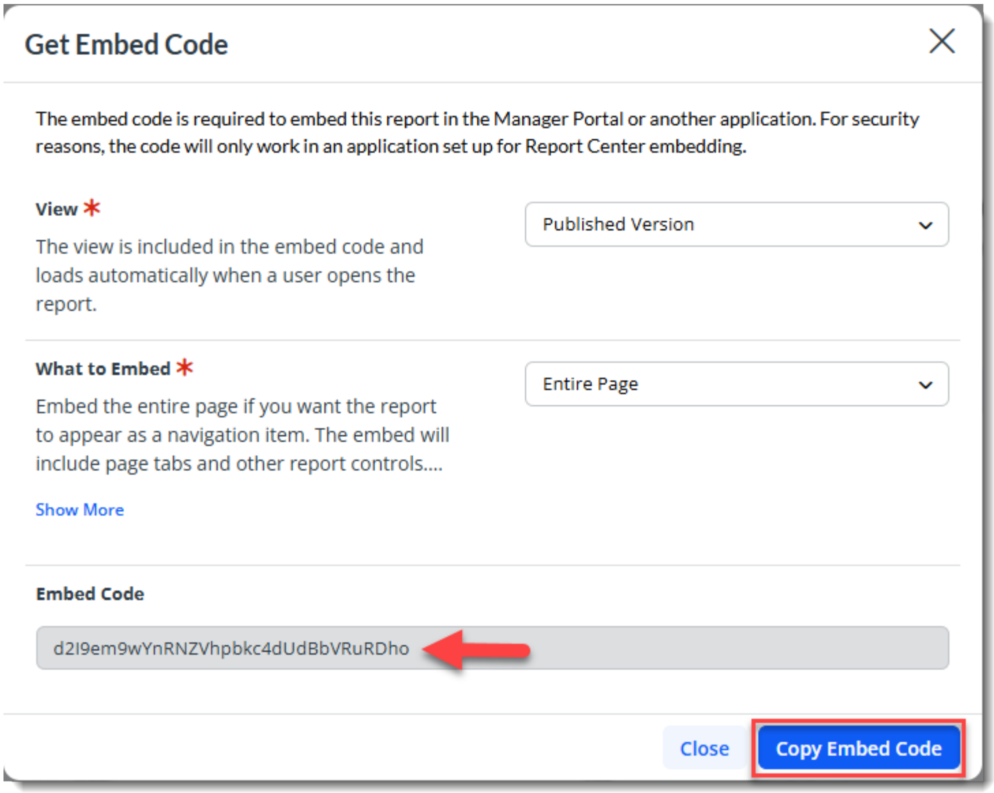
1. On the Report Center **Home**  page, locate the report tile (by using the **Search** bar at the top of the page or by scrolling the list of available reports).
2. Click the **blue** report title link to open it.
3. Click **Share** > **Get Embed Code**.



   The Get Embed Code window displays.

4. Complete the following settings:
   - **View** - Select Published Version to use the currently published version (recommended) or Unpublished Version to use an unpublished version of the workbook or view. This selection is included in the embed code.
   - **What to Embed** - Select entire page if you want the viewer to be able to see all page tabs and report controls or select an element of the report such as a single tab or a chart.

5. Click **Copy Embed Code**.



Step 2: Configure the Widget

To configure the widget:

1. In ClientSpace, go to **System Admin** ⚙ > **Widget Layouts**).
   The Widget Layouts dashboard displays.
2. Add a widget layout or open an existing layout in the grid by clicking the **Open** icon next to the widget layout line item.
3. **Add a Business Intelligence Widget:** Click **Add Widgets** button > Select **Business Intelligence** from Widget Library and then click **Settings** on the Business Intelligence widget tile.
   OR
   Open an existing widget: Click **Settings** on an existing Business Intelligence widget tile.
   The Widget Settings form opens.
4. Complete the fields:

Reporting System	Select Sigma.

Embed Code	Paste the embed code you copied from Report Center.
Report	Type the name of the Report Center report you want to use in the widget. **Note:** A future enhancement is pending that will allow you to select the report from the drop-down list. For now, please type the report name.
Filter	Report Center widgets respect the Current Workspace and Current Record auto-filter settings. Also, if the report or element that you are embedding has interactive filter settings that you set up in Report Center, users can use them once the report is embedded as a widget. In that instance, select None in the **Filter** field since your users will be setting their own filters "on-the-fly".

5. Click **Save Settings** on the Widget Settings form.

   You are returned to the Widget Layout Details window. If this is a new Widget Layout, a **Publish** button displays in the upper left corner of the window. (If the layout is already published, the button displays as **Unpublish**.)

6. If applicable, click the **Published** button when you are ready to publish the layout.

Creating ClientSpace Custom Dataform Links Using Report Center Workbooks or Views

This article will show you how to get the embed code from a Report Center workbook or view and add it to a ClientSpace dataform as a custom link.

Note:

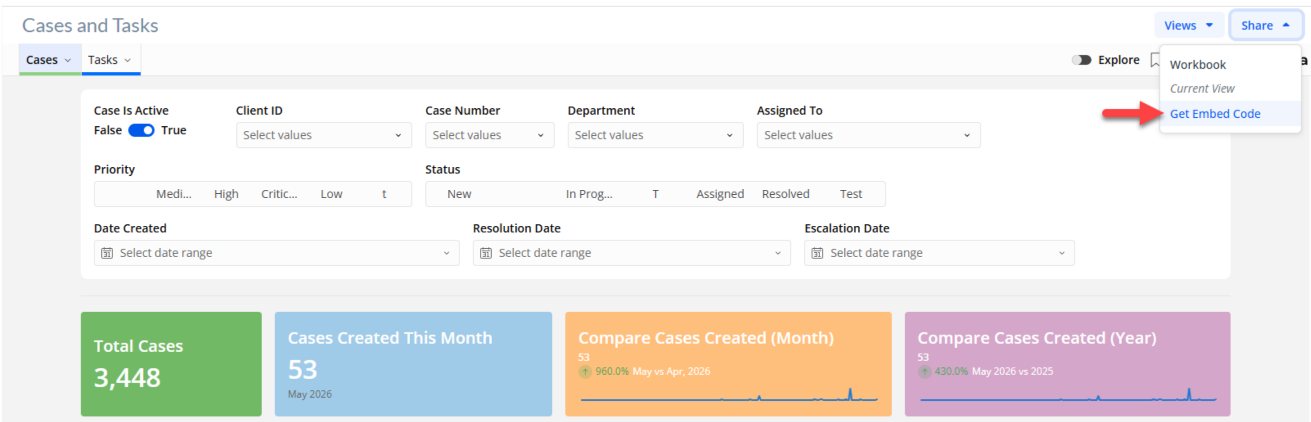
- You can only get the embed code on Report Center workbooks and views that you are authorized to access.
- You have the option of embedding the entire report or elements of the report such as a graph, chart or data grid.
- Any interactive filter drop-down lists you may have added to the report or report element in Report Center are still functional within the ClientSpace widget.
- Once the report link is clicked, the report:

- Renders based on the viewer's security and role permissions.
- Displays as a work item on the navigation pane of ClientSpace.

Step 1: Copy the Embed Code from Report Center

To copy the embed code:

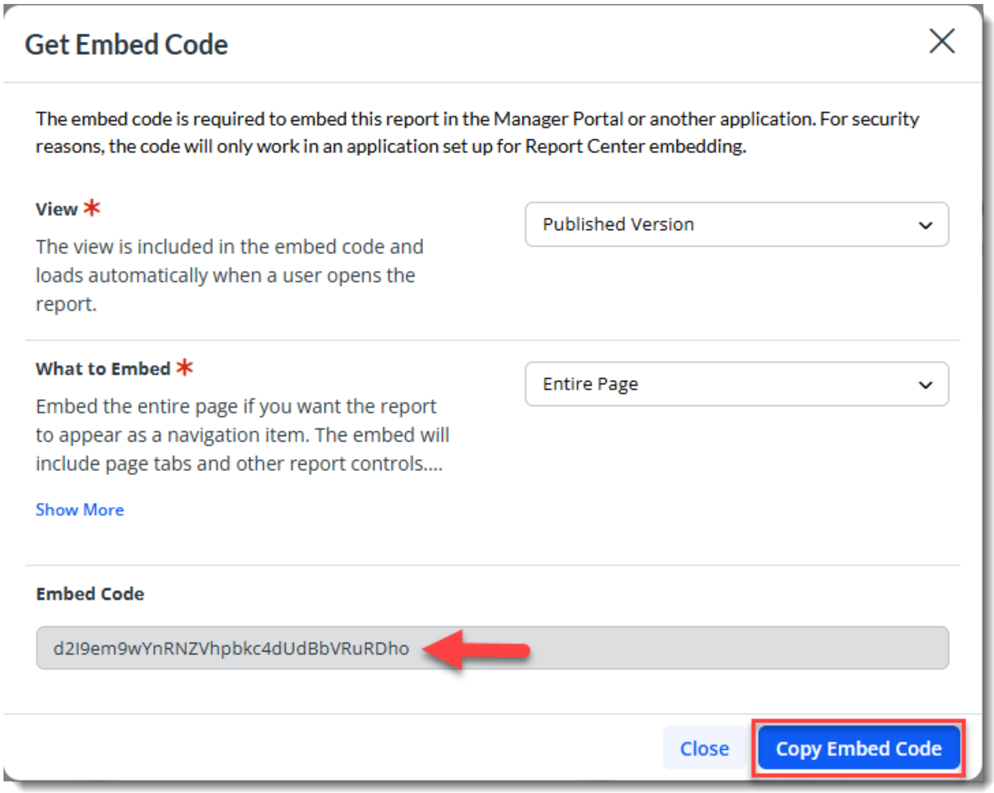
1. On the Report Center **Home** page, locate the report tile (by using the **Search** bar at the top of the page or by scrolling the list of available reports).
2. Click the **blue** report title link to open it.
3. Click **Share** > **Get Embed Code**.



The Get Embed Code window displays.

4. Complete the following settings:
   - **View** - Select Published Version to use the currently published version (recommended) or Unpublished Version to use an unpublished version of the workbook or view. This selection is included in the embed code.
   - **What to Embed** - Select entire page if you want the viewer to be able to see all page tabs and report controls or select an element of the report such as a single tab or a chart.

5. Click **Copy Embed Code**.



Step 2: Configure the Custom Link

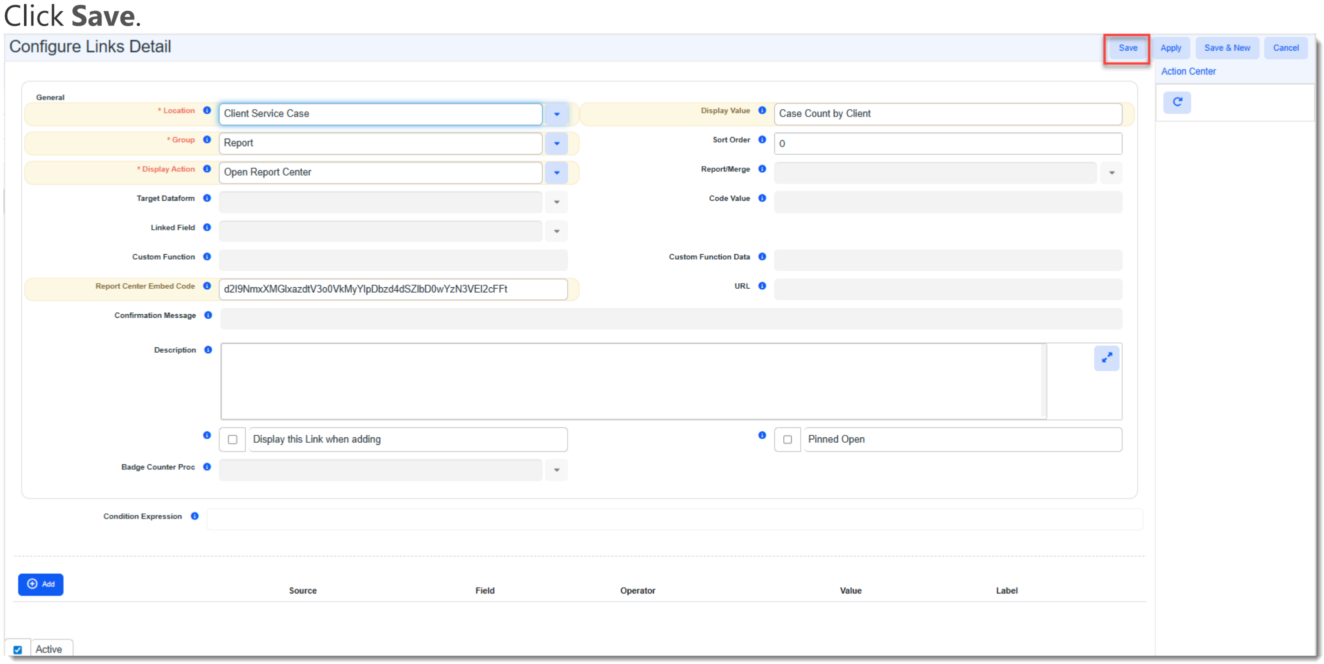
To configure the custom link:

1. Go to **System Admin** > **Advanced** > **Custom Links**.
   The Configure Links dashboard opens.
2. Click **Add**.
   The Configure Links Detail form opens.
3. Complete the form.

Location	Name of the dataform or system object on which you want the link to appear.
Display Value	Enter the link text.
Group	Select Report to place the link in the **Reports** group of the dataform.
Display Action	Select Open Report Center.

Sort Order	The **Sort Order** determines the order of individual items within the Report group. The lower the number, the closer to the bottom of the list the link appears. 0 places the report at the bottom of the list if there are other links in the **Reports** group.
Report Center Embed Code	Paste the embed code you copied from Report Center here.
Display this Link when adding	Prior to **Save**, dataforms generally do not display links. This option allows you to display the link before the initial form **Save**. If you want the link to always appear, regardless of whether the dataform has been saved, select the **Display this link when adding** option.
Pinned Open	When this option is enabled (selected), it forces the link to display in the Action Items area. The link does not collapse when the associated group is collapsed.

4. Click **Save**.



When a user opens the dataform where you added the link, the link displays in the **Reports** group of the Action Center. When the link is clicked, the report name displays as a work item in the ClientSpace left navigation pane.

Special Note on ClientSpace Editor Fields in Report Center

HTML formatting in ClientSpace Editor fields does not display in Sigma Report Center data tables as it does in Izenda reports.

In Izenda reports, formatting, images and links display for **Editor** fields. In Report Center, this is not supported. The formatting tags display but they are not converted to display formatting, images, or links as shown in the example of ClientSpace Editor field contents in a Report Center table below:

z_Body
null
The Signers and Log Data fields have been added to Quick Search (%) Search Fields (contains) on the Uploaded Files Qu...
<p>All BPM Save operations are now routed through a new BPM pipeline. As part of this enhancement, th...
A users Mass Update feature has been added to the Users Dashboard (System Admin > Users). Global ...
Previously, if a ran a merge and logged out, if another user logged in and attempted to run the same merge, an error oc...
The Create Benefits Group business rule has been deleted. This rule was no longer recommended for use as it incorrect...
<p>Two new business rule methods were added to allow you to configure a rule that displays a custom hard or soft err...
Previously, on the Clients module dashboard in the More search, the Status field lookup displayed lookup code values i...
<p>Previously, when you opened the Benefit Plan drop-down list on an Offered Benefits Plan, the list values were not so...
<p></p><p>An Enable Revert/Original Value functionality field has been added to App Settings (System A...
<p>The following changes have been made to the Benefit Premium Basis metadata lookup group: </...
<p>The following new User GET method has been added to the ClientSpace API: </p><p>GET/api/user/v3.0/{id} ...
<p>Updated the Benefit Plan and Associated OBP Logic for When a Benefits Coverage Level is Set to "No"</p><p>The fo...

This is a known issue to keep in mind when using any "out-of-box" or custom ClientSpace Editor field in Report Center.

Frequently Asked Questions

Q: Can I join to PrismHR data?

A: Currently, PrismHR and ClientSpace data are separate.

Q: When will the switch from Izenda to Report Center be complete?

A: You will no longer be able to access Izenda reports on **February 1st, 2027**.

Q: As a beta participant, will you convert my reports from Izenda to Report Center?

A: We are currently testing a report conversion tool that will convert the Izenda data to Report Center data models (with the existing joins and selected fields in place). We will partner with all of our beta participants on a case-by-case basis on a conversion plan.