Workforce Analytics – Frequently Asked Questions

What is the difference between the Home Page and Executive Dashboard?

The Home Page is the landing page of Workforce Analytics when the user first logs in to the platform. The Executive Dashboard is a collection of key metrics, trends and related visualizations provided to give snapshots of the business across Payroll, Benefits and Human Resources to the executive teams. It allows them to see how the company is doing in these areas and manipulate the data for different Pay groups, Departments and Locations for different months in the preceding year. It is designed with executives in mind providing them the most accurate and actionable information in one place.

What are the roles/permissions in Workforce Analytics?

Workforce Analytics offers two roles:

Workforce Analytics Administrator – Administrators can view all reports, information and features without limitation and assign User access to other users of Workforce Analytics. Administrators must be assigned by the HR Security role holder at their company. Administrators can only add and edit Users, not other Administrators.

Workforce Analytics User – Users can be granted full or limited visibility to all reports, information, report builders and dashboards. Users must be assigned by the Workforce Analytics Administrator at their company.

Admin role can view reports, dashboards, and assign user level permissions to view and administer reports.

How do I give access to "Report Builder"?

Initially, a Workforce Analytics Administrator is given access to the Report Builder feature. Administrators can then provide access to Workforce Analytics Users within the Admin > Manage Users section.

What does 'Report Builder' access mean to users?

The Report Builder allows users to edit a handful of standard reports by adding/removing data within the reports and to also build their own customized reports.

Why can't a user edit certain standard reports?

There are a handful of standard reports that can be edited. Some reports are standard system reports that aren't currently available for edit.

What do I need to be able to create a custom report?

To create a custom report, you must have access to the Report Builder feature. A Workforce Analytics Administrator can assign access to this feature.

How do I report a report to an excel file?

Any report (standard/custom) can be exported in Excel, PDF or CSV format by clicking the "Export" button within a report or within the Report Builder.

How do I create a copy of a report?

Users can create a copy by first editing the desired report and then saving it appropriately under a report category using Report Builder.

What are customized “views” of a report?

Views are those that are found on report data created by the report author; TriNet teams or individual users on the customer side. They become available the moment a report is saved and made available

Customized views are views that an individual report user (not necessarily an author) stores by performing actions like grouping, sorting, and filtering on the available default views in a report.

What factors affect the performance (amount of time) of a report?

The performance of a report depends upon the amount of data (use required filters to limit the rows), the number of columns of data (edit the report to remove columns you don’t need), and the bandwidth of your computer (to render all the data in the browser).

What permissions does an “Workforce Analytics Admin” have that a user might not?

Only Workforce Analytics Administrators have the ability to assign the Workforce Analytics User role to other employees.

What should I use “Favorites” for?

You can use "Favorites" for quickly accessing your favorite or most used reports. Users can access their favorite reports from the home page quick links section and also by sorting by favorite in the list of reports within a section.

How can I give TriNet feedback on Workforce Analytics?

Users can provide their feedback on the product by clicking the feedback icon on the top right corner or by completing a feedback form when exiting Workforce Analytics.

How do I sort a column?

Columns can be sorted by clicking on the column header. With the first click, data is sorted in ascending order. With the second click, data is sorted in descending order.

How can I filter a column?

Columns can be filtered by clicking the column header and selecting the filter icon.

What are report filters?

Filters allow users to specify common ways they like to see their data. Report filters can either be mandatory or optional.

Can I add report filters?

Yes, report filters can be added in custom reports. Standard reports do not allow adding report filters.

Can I sort multiple columns?

Yes, multiple columns can be sorted by sorting one column and press + hold the Shift key to select and sort the other columns.

How do I group my data?

Click on the hamburger icon on the column header and select the “group by” option to group your data.

When employees are added to my company, do they still have access to Workforce Analytics?

For an employee to get access to Workforce Analytics, a Workforce Analytics Administrator must set up the employee as a Workforce Analytics Users.

When an employee leaves the client, do still have access to Workforce Analytics?

When the termination process is completed on the TriNet platform, access to Workforce Analytics is blocked to the terminated employee within 2 hours.

How do I look at multiple client entities in Workforce Analytics?

This feature is not available at this time.

What is the difference between a report and a dashboard?

A report is a collection of relevant data for the subject area of the report. It could consist of a grid, a table, a chart or any combination of these elements. In grid reports, you could use the native features of TriNet's framework to filter, pivot or slice the data as per your business needs and create a view for future use. By default, Workforce Analytics provides 55 standard reports across HR, Payroll and Accounting, Taxes and Compliance and Benefits. A customer can also enable some key employees to create custom reports using our powerful report builder feature which presents them a palette of organizational data to choose and include in a report.

A dashboard is a visual display of the most important information needed to achieve one or more organizational objectives; consolidated and arranged on a single screen so the information can be monitored at a glance. Currently we offer an executive dashboard which has been designed keeping in mind the needs of the management team for a customer organization. It is a collection of key KPIs that affect organizational effectiveness that allow the executives to make right decisions and have a snapshot of their business from the metrics and trends available. We will continue adding to the default set of dashboards over the next few quarters.

Can I change the font or size of the data?

This feature is not available at this time.

How do I hide/unhide columns?

Click and drag a column off the grid to remove the column. To add the column back, click on the hamburger icon and select Tool Panel. Then select the column that was removed from the report to add it back.

If I delete a report, can I get it back?

This feature is currently not supported.

If I delete a view, can I get it back?

This feature is currently not supported.

Can I change the order of the views?

This feature is currently not supported.

Can I rename a report?

You can rename a report by first editing the report and then saving it with a different name.

Can I hide a report I never use?

This feature is currently not supported.

Can I change the category of a report?

Yes. When you save a report, you have the option to select a category location for storing the report.

How do I "clear" all filters?

At this time users must clear each filter individually to reset the state of the rows displayed. Filters can be cleared by selecting on the list icon by hovering over columns in a report.

How do I “clear” all groupings?

At this time users must clear each grouping individually to reset the state of the rows displayed. A column can be un-grouped by selecting on the list icon by hovering over columns in a report.

What data in Workforce Analytics is masked for PII/Security?

Personal Information such as Age, Birth Country, Ethnicity, Birth Date, Social Security Number, Gender, Marital Status, US National ID, Visa information etc.

What are subject areas?

Subject areas are logical groupings of data that can be used together to create meaningful reports for the business users. An organization stores and tracks a variety of data regarding all aspects of their business and operations. This data contains similar but unrelated data, so it is important that the report author creating a report to select the right data to present an accurate and usable report. Subject areas work as guardrails for the report author to prevent from selecting unrelated data and enable the report author to present the right information to the users.

Can a user create reports across subject areas?

Users cannot create reports from data across subject areas as these reports would not be logical and present the right picture of the business to the reporting user.

What happens if a user changes the subject area on a report?

If users create a report for a subject area of the report and then in the middle of authoring decides to change the subject area, the system will remove elements that are not available in the new subject area from the report. Hence it is important that users create the report with a specific objective in mind and select the right subject area

What should a user do to find a field that they need when creating a specific type of report for a specific subject area?

Users can reach out to our Customer Experience teams and they will log an enhancement request. The product team will analyze the request and make decisions based on whether it is a valid request. In case the request is valid, we will incorporate the feedback in the product in an upcoming release.

What is the Executive Dashboard?

The Executive Dashboard is a collection of key metrics, trends and related visualizations provided to give snapshots of the business across Payroll, Benefits and Human Resources to the executive teams. It allows them to see how the company is doing in these areas and manipulate the data for different Pay groups, Departments and Locations for different months in the preceding year. It is designed with executives in mind providing them the most accurate and actionable information in one place.

Can a user with access to the Executive Dashboard see the data for the entire company?

Even though the Executive Dashboard is designed for management teams and provides access to Payroll, Benefits and HR data, the individual data security of the accessing user governs what data he can see based on permissions assigned to him by the Workforce Analytics administrator in the User Management module. So, based on his permissions an individual with access could see data for the entire company, for a specific collection of departments, location or for his direct reports.

What should an administrator consider when providing access to the Executive Dashboard?

When providing access to the Executive Dashboard, a Workforce Analytics Administrator should confirm that the user being provided access has privileges to view Payroll, Benefits and HR sensitive data including Personal Identification Information for the company, location, department or the team he has visibility into.

Some of this data is highly sensitive so the Workforce Analytics Administrator should use discretion when providing access to the dashboard.

What is the difference between a Default view and a Personalized view?

Default view are the views on report data created by the report author; TriNet teams or individual users on the customer side. They become available the moment a report is saved and made available

Personalized views are views that an individual report user (not necessarily an author) stores by performing actions like grouping, sorting, filtering on the available default views in a report. They are uniquely available to the report user in the Workforce Analytics environment.