

## Introduction

Employee Analytics provides great tools for managing employees and key dates and routines. This article discusses some of the filtering and search options available on the **Anniversaries** screen.

## Anniversaries

Anniversaries allow the user to access a listing of their employee's anniversaries based on their hire date or adjusted service date. The **Anniversaries** screen can be accessed by navigating to **Employee Admin Tools > Employee Analytics > Anniversaries**.

At the top of the screen, there is a drop-down menu that says, "Anniversaries in the next 7 days." This is one of the filtering options for this screen. When this drop-down is selected, a list of additional filters display including:

- Anniversaries in the next 7 days (default selection)
- All Anniversaries
- January Anniversaries
- February Anniversaries
- March Anniversaries
- April Anniversaries
- May Anniversaries
- June Anniversaries
- July Anniversaries
- August Anniversaries
- September Anniversaries
- October Anniversaries
- November Anniversaries
- December Anniversaries

The **Based on** filter allows for additional filtering options including:

- Most recent hire date
- Adjusted service date

To generate anniversaries on the grid, make your filter selections.

## Functionality

Once you have selected your filters and your employee information is displaying within the grid, the **Anniversaries** screen allows you to further filter and search your results.

Group information by selecting the column heading and dragging it to the **Drag a column header here to group by that column** field. Below is an example of grouping by work location.

**Anniversaries**

6 - June Anniversaries Based on: Most recent hire date Employees with anniversaries 06/01 to 06/30 are displayed below.

Expand All Groups Collapse All Groups Clear Grouping/Filters

Work Location

| Legal Name                      | Employee Name       | Employee ID | Status Description | Hire ...  | Length of Service (Hire Date) |
|---------------------------------|---------------------|-------------|--------------------|-----------|-------------------------------|
| q                               | q                   | q           | q                  | q         | q                             |
| Work Location: DETROIT, MI (1)  |                     |             |                    |           |                               |
| Work Location: New York, NY (5) |                     |             |                    |           |                               |
| May 2019 HR Test Inc            | Mason J Malarkey    | 1000        | Active             | 6/1/1976  | 48 years, 1 month, 3 days     |
| May 2019 HR Test Inc            | Martin C Malarkey   | 1001        | Active             | 6/1/1999  | 25 years, 1 month, 3 days     |
| May 2019 HR Test Inc            | Minerva Pillsen     | 1022        | Active             | 6/25/2019 | 5 years, 9 days               |
| May 2019 HR Test Inc            | Joan M Michaels     | 1064        | Active             | 6/1/2020  | 4 years, 1 month, 3 days      |
| May 2019 HR Test Inc            | Thomas Horton (T... | 1033        | Active             | 6/5/2020  | 4 years, 29 days              |
| Work Location: PORTLAND, OR (1) |                     |             |                    |           |                               |
| Work Location: SARASOTA, FL (4) |                     |             |                    |           |                               |

You can use additional filters within the grid by selecting the filter icon within the column headings.

| Legal Name | Employee Name | Employee ID | Status Description | Hire Date |
|------------|---------------|-------------|--------------------|-----------|
|------------|---------------|-------------|--------------------|-----------|

Length of Service (Hire Date)

q

48 years, 1 month, 3 days

25 years, 1 month, 3 days

21 years, 21 days

5 years, 9 days

4 years, 1 month, 3 days

4 years, 29 days

4 years, 16 days

2 years, 25 days

2 years, 21 days

2 years, 13 days

Search within each column by selecting the magnifying glass icon. Then key in the information you are looking for.

Employee ID

q 1055

Contains

Does not contain

Starts with

Ends with

= Equals

≠ Does not equal

q Reset

Select the **Column Chooser** icon, add a column from the list, or drag an unwanted column to remove it from your headers.

**Anniversaries** isolved University Help

6 - June Anniversaries Based on: Most recent hire date Employees with anniversaries 06/01 to 06/30 are displayed below.

Expand All Groups Collapse All Groups Clear Grouping/Filters

Drag a column header here to group by that column

| Legal Name      | Employee Na...      | Employee ID | Work Location | Status ... | Hire Date | Length of Service (Hire Date) | Adjusted... | Length of S... |
|-----------------|---------------------|-------------|---------------|------------|-----------|-------------------------------|-------------|----------------|
| May 2019 HR ... | Mason J Malarkey    | 1000        | New York, NY  | Active     | 6/1/1976  | 48 years, 1 month, 3 days     |             |                |
| May 2019 HR ... | Martin C Malarkey   | 1001        | New York, NY  | Active     | 6/1/1999  | 25 years, 1 month, 3 days     |             |                |
| May 2019 HR ... | Martha Watson       | 1018        | PORTLAND, OR  | Active     | 6/13/2003 | 21 years, 21 days             |             |                |
| May 2019 HR ... | Minerva Pillsen     | 1022        | New York, NY  | Active     | 6/25/2019 | 5 years, 9 days               |             |                |
| May 2019 HR ... | Joan M Michaels     | 1064        | New York, NY  | Active     | 6/1/2020  | 4 years, 1 month, 3 days      |             |                |
| May 2019 HR ... | Thomas Horton (...) | 1033        | New York, NY  | Active     | 6/5/2020  | 4 years, 29 days              |             |                |
| May 2019 HR ... | Sierra Vega         | 1055        | SARASOTA, FL  | Active     | 6/18/2020 | 4 years, 16 days              |             |                |
| May 2019 HR ... | Jonathan Doerty     | 1088        | SARASOTA, FL  | Active     | 6/9/2022  | 2 years, 25 days              |             |                |
| May 2019 HR ... | Alyson Whittman     | 1087        | SARASOTA, FL  | Active     | 6/13/2022 | 2 years, 21 days              |             |                |
| May 2019 HR ... | Linda McClainey     | 1089        | SARASOTA, FL  | Active     | 6/21/2022 | 2 years, 13 days              |             |                |
| May 2019 HR ... | Shelley Morton      | 124123      | DETROIT, MI   | Active     | 6/21/2024 | 13 days                       |             |                |

Column Chooser

- Name
- DBA
- Assigned Manager
- Assigned Supervisor
- Status
- Self Service Email
- Organizations

Select the Export icon to create an Excel file with the results of the filters selected. Here is an example:

| Legal Name           | Employee Name         | Employee ID | Work Location | Status Description | Hire Date | Length of Service (Hire Date) | Adjusted Service Date | Length of Service |
|----------------------|-----------------------|-------------|---------------|--------------------|-----------|-------------------------------|-----------------------|-------------------|
| May 2019 HR Test Inc | Mason J Malarkey      | 1000        | New York, NY  | Active             | 6/1/1976  | 48 years, 1 month, 3 days     |                       |                   |
| May 2019 HR Test Inc | Martin C Malarkey     | 1001        | New York, NY  | Active             | 6/1/1999  | 25 years, 1 month, 3 days     |                       |                   |
| May 2019 HR Test Inc | Martha Watson         | 1018        | PORTLAND, OR  | Active             | 6/13/2003 | 21 years, 21 days             |                       |                   |
| May 2019 HR Test Inc | Minerva Pillsen       | 1022        | New York, NY  | Active             | 6/25/2019 | 5 years, 9 days               |                       |                   |
| May 2019 HR Test Inc | Joan M Michaels       | 1064        | New York, NY  | Active             | 6/1/2020  | 4 years, 1 month, 3 days      |                       |                   |
| May 2019 HR Test Inc | Thomas Horton (Tommy) | 1033        | New York, NY  | Active             | 6/5/2020  | 4 years, 29 days              |                       |                   |
| May 2019 HR Test Inc | Sierra Vega           | 1055        | SARASOTA, FL  | Active             | 6/18/2020 | 4 years, 16 days              |                       |                   |
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