



# Guardian Issues Report

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# Reports Module

**The Reports Module** provides an easy-to-use tool to analyze data, including compliance measures and database configuration.

The Reports Module is accessible from the Reports menu button within Guardian. This button is visible to all users who have Report access. Visible report types and report functionality are dependent on user privileges.

**Two types of reporting functions are offered: Standard and Interactive.**

- Standard reports are pre-configured templates that provide useful information associated with I-9s, E-Verify, and FAR.
- The Interactive report type is a comprehensive reporting tool allowing for extensive customization of report columns and filter criteria.

# Reports Module

The **Interactive Report Type** provides a number of **Base Table** options, including **I-9 Issues**.

The I-9 Issues report may be used throughout the Remediation process to identify the remaining unaddressed issues with imported I-9's.

As Remediation efforts progress, the report may be updated to review the outstanding issues.

An I-9 Issues report is also a useful tool for batching out issues for members of your Remediation project to address, as the report can be filtered by **Location**, **Date Hired** range, and other criteria.

# Creating an I-9 Issues Report

To access the **Reports Module**, click on the **Reports Tab** on the Dashboard.

Guardian

Announcements Help ▾ Denise Moreno ▾ Logout

Dashboard Start I-9 Employee ▾ E-Verify **Reports**

Employee Group  Location  
Western US Refresh All

Type of I-9: **Current** | Imported  
[Create New Employee](#)

## Top Pending I-9s

[View](#) [All](#) [Analyze](#)

	Date I-9 Created	Location	Employee Name	Status	Section 1 Deadline	Section 2 Deadline	
● E	08/12/2020	Portland:	Moore, David	Signed Sec 2	08/18/2020	08/21/2020	
● E	09/09/2020	Portland:	Nestor, Sabina	Started	09/04/2020	09/10/2020	
● E	08/28/2020	Portland:	Brady, Sam	Signed Sec 1	09/16/2020	09/21/2020	
● E	09/18/2020	Phoenix:	Jones, Steve	Started	09/18/2020	09/23/2020	
● E	09/21/2020	Portland:	Sanchez, Samuel	Started	09/21/2020	09/24/2020	
● E	09/21/2020	Portland:	Chavez, Donald	Started	09/21/2020	09/24/2020	
● E	09/21/2020	Portland:	Michaels, Sandra	Started	09/25/2020	09/30/2020	
● E	09/02/2020	Phoenix:	McNeil, Mary	Started	09/30/2020	10/05/2020	

## Top I-9s Needing Approval

[View](#) [Analyze](#)

	Date I-9 Created	Location	Employee Name	Employee Start Date	Approval E-Verify Deadline
● E	09/09/2020	Portland:	Salek, Tim	09/03/2020	09/09/2020
● E	09/09/2020	Portland:	Adams, Sam	09/04/2020	09/10/2020
● E	08/18/2020	Los Angeles:	Jones, Robert	09/17/2020	09/22/2020
● E	08/07/2020	Los Angeles:	Tucker, Marshall	10/01/2020	10/06/2020
● E	08/26/2020	Phoenix:	Brady, Marcia	10/01/2020	10/06/2020

## Top I-9s Needing Further Action

[View](#) [All](#)

	Date I-9 Created	Location	Employee Name	Reason	Date Expires	Days Left
● E	08/17/2020	Portland:	Davis, Steve	Receipt	12/15/2020	83

## Top Pending Re-Verifications

[View](#) [All](#) [Analyze](#)

	Date I-9 Created	Location	Employee Name	Expiration Date	Days Left
● E	08/17/2020	Phoenix:	Lopez, Deborah	10/10/2020	18
● E	09/14/2020	Portland:	Bennett, Susan	11/25/2020	64
● E	09/21/2020	Portland:	Stevens, Justin	12/31/2020	100
● E	08/17/2020	Portland:	Duncan, Sandra	12/31/2020	100
● E	08/28/2020	Phoenix:	Stevens, Brent	02/15/2021	146
● E	09/09/2020	Portland:	Milbarge, Joe	08/01/2021	313

# Creating an I-9 Issues Report

Select the **Interactive** Report Type and click **New**.

[Dashboard](#)[Start I-9](#)[Employee](#) ▾[E-Verify](#)[Reports](#)

### Report Types

All Types  
Interactive  
Pending Reverifications  
I-9 Issues  
Employee Groups

### Reports: All Types [Mine]

Filter ▾ Refresh Report + New

Name	Created by
Interactive (10037)	Moreno, Denise
Pending Reverifications (10096)	Moreno, Denise
Timeliness Report	Moreno, Denise

### Report Details & Settings

#### 💡 Help with Reports

On the left are two lists.

- The top list, **Report Types**, shows all of the various report types that can be created.
- The lower list, **Reports:**, shows the reports available for viewing (based on the report type and filter selected).

#### Report Types

- Click on any desired report type to see all reports of that type.
- Click **All Types** to see all reports, regardless of type.
- To create a new report, first select the desired report type from the list, then click the **New** button in the list of **Reports:** shown.

#### Reports

- You can use the **Filter** menu to restrict the list of reports to:
  - **All** - show reports of the selected type
  - **Shared** - show reports that have been shared by users
  - **Mine** - show reports created by you
  - **Others** - show reports created by everyone but you
  - **Private** - shows private reports created by you
- Click any report to view it, update it, or change it's parameters.
- Click the **Refresh** button to update the list of available reports
- Click the **Reports** menu to:
  - **Duplicate** - duplicate the currently selected report
  - **Delete** - delete the currently selected report
- Click the **New** button (if enabled) to create a new report of the selected type in the Reports Types list

# Creating an I-9 Issues Report

Select the **I9 Issues** Base Table.

Dashboard

Start I-9

Employee ▾

E-Verify ▾

Reports

## Report Types

All Types

Interactive

Pending Reverifications

I-9 Issues

Employee Groups

## Reports: Interactive [All]

Filter Refresh Report New

Name	Created by
Interactive (10044)	Admin, LLX
Interactive (10047)	Reaume, Robert
Interactive (10132)	Reaume, Robert
Interactive (10167)	Reaume, Robert
Interactive (10173)	Reaume, Robert
Interactive (10190)	Reaume, Robert
Interactive (10191)	Reaume, Robert
Interactive (10192)	Reaume, Robert
Interactive (10403)	Reaume, Robert

## Settings

### Report Information

Report Type: Interactive

Created by: Reaume, Robert : 01/11/2021 @ 12:07:12

Last Run: -

Rows X Columns: 0 X 0

**This report has never been run**

### Report Settings

Report Name: Interactive (10403) 10403

Base Table:

Employee Group Assignments

Employee

FAR

**I9 Issues**

I9 Section 3

I9

Locations

Multi-Business Units

\* If the HR Filter Group is specified, it will be

Update Settings

# Creating an I-9 Issues Report

Enter a new **Report Name** to make it easier to locate the report in the future.

## Report Types

- All Types
- Interactive
- Pending Reverifications
- I-9 Issues
- Employee Groups

## Reports: Interactive [Mine]

Filter Refresh Report New

Name	Created by
Interactive (9852)	Reaume, Robert
Interactive (9887)	Reaume, Robert
Interactive (9894)	Reaume, Robert
Interactive (9955)	Reaume, Robert
Late Submissions	Reaume, Robert
Master Employee Report	Reaume, Robert
New Hire Paper Docs	Reaume, Robert
Notes Test Report	Reaume, Robert

## Settings

Columns

Preview

### Report Settings

Report Name: Remediation Report 0403

Base Table: I9 Issues

### Scheduler Options

Generate Automatically: -- Select Frequency --

Days To Run: -- Select Days To Run --

Must first select frequency above to set how often the report will be generated

### Filter Options

\* Employee Group: My Managed Groups

Employee Location: All

Employee: All

I-9 Forms: Archival I-9s

Scope: Primary

I-9 Error Type: All

I-9 Issues: All

### Date Range

Date to Search: None

Value Date Range

Value Date Range



# Filter Options

A variety of **Filter Options** are provided.

To limit report results to historical I-9's, set **I-9 Forms** to **Archival I-9s** and **Scope** to **Primary**.

The screenshot shows the LawLogix Reports interface. The top navigation bar includes Dashboard, Start I-9, Employee, E-Verify, and Reports. The left sidebar shows Report Types (All Types, Interactive, Pending Reverifications, I-9 Issues, Employee Groups) and a table of reports for Interactive [All]. The main content area is titled 'Base Table: I9 Issues' and contains several sections: Scheduler Options, Filter Options, and Sort Options. The Filter Options section is highlighted with a red box, showing the following settings: Employee Group: My Managed Groups, Employee Location: All, Employee: All, I-9 Forms: Archival I-9s, Scope: Primary, I-9 Error Type: All, and I-9 Issues: All.

**Report Types**

- All Types
- Interactive
- Pending Reverifications
- I-9 Issues
- Employee Groups

**Reports: Interactive [All]**

Name	Created by
Interactive (10044)	Admin, LLX
Interactive (10047)	Reaume, Robert
Interactive (10132)	Reaume, Robert
Interactive (10167)	Reaume, Robert
Interactive (10173)	Reaume, Robert
Interactive (10190)	Reaume, Robert
Interactive (10191)	Reaume, Robert
Interactive (10192)	Reaume, Robert
Interactive (10403)	Reaume, Robert

**Settings** Columns Preview

Base Table: I9 Issues

**Scheduler Options**

Generate Automatically: -- Select Frequency --

Days To Run: -- Select Days To Run -- Must first select frequency above to set how often the report will be generated

**Filter Options**

\* Employee Group: My Managed Groups

Employee Location: All

Employee: All

I-9 Forms: Archival I-9s

Scope: Primary

I-9 Error Type: All

I-9 Issues: All

**Sort Options**

Primary Sort: N/A - Report Columns Not Yet Defined.

Direction: A-Z

\* If the HR Filter Group is specified, it will be used instead of the Responsible HR Filter.

# Filter Options

The **Employee Location** filter can be used to report on I-9's from a specific location.

**Report Types** ▾

- All Types
- Interactive
- Pending Reverifications
- I-9 Issues
- Employee Groups

**Reports: Interactive [All]**

Filter ▾ Refresh Report ▾ New

Name	Created by
Interactive (10044)	Admin, LLX
Interactive (10047)	Reaume, Robert
Interactive (10132)	Reaume, Robert
Interactive (10167)	Reaume, Robert
Interactive (10173)	Reaume, Robert
Interactive (10190)	Reaume, Robert
Interactive (10191)	Reaume, Robert
Interactive (10192)	Reaume, Robert

**Settings** Columns Preview

Base Table: I9 Issues

**Scheduler Options**

Generate Automatically: -- Select Frequency --

Days To Run: -- Select Days To Run -- Must first select frequency above to set how often the report will be generated

**Filter Options**

\* Employee Group: My Managed Groups

**Employee Location:** All

Employee: [Search]

I-9 Forms: All

Scope: Branch 1234  
Branch 5678

I-9 Error Type: Chandler

I-9 Issues: CLOSED - New York  
Denver Office  
DM Import

Prim: [Search]

Direction: A-Z

\* If the HR Filter Group is specified, it will be used instead of the Responsible HR Filter

# Filter Options

The **Employee** filter can be used to report on *current vs terminated* employees.

It can be useful to differentiate these two groups, as the approach to amending an employee's I-9 may vary depending on whether they are still employed.

The screenshot shows the LawLogix interface with the 'Reports' tab selected. The left sidebar contains a 'Report Types' menu with 'Interactive' highlighted, and a 'Reports: Interactive [All]' section with a table of report entries. The main content area is titled 'Settings' and 'Columns' for 'Base Table: I9 Issues'. It includes 'Scheduler Options' for automatic generation and a 'Filter Options' section. In the 'Filter Options' section, the 'Employee' dropdown is open, showing options: 'All', 'Status: Current', 'Status: Terminated - Retain', and 'Status: Terminated - Purgeable'. The 'Employee' label and the 'All' option are circled in red. Below the filters is a 'Sort Options' section with 'Primary Sort: N/A - Report Columns Not Yet Defined.' and 'Direction: A-Z'.

Name	Created by
Interactive (10044)	Admin, LLX
Interactive (10047)	Reaume, Robert
Interactive (10132)	Reaume, Robert
Interactive (10167)	Reaume, Robert
Interactive (10173)	Reaume, Robert
Interactive (10190)	Reaume, Robert
Interactive (10191)	Reaume, Robert
Interactive (10192)	Reaume, Robert

\* If the HR Filter Group is specified, it will be used instead of the Responsible HR Filter.

# Filter Options

The **I-9 Error Type** filter can be used to report on **Warnings**, **Errors**, or both.

**Warnings** typically represent uncorrectable issues (e.g., late I-9's), and/or non-finable items.

Setting this filter to **Errors** can be helpful to keep the report focus on items that should be corrected, where possible.

The screenshot shows the LawLogix interface for generating an I-9 Issues report. The 'Reports' tab is active. The 'Filter Options' section includes:

- \* Employee Group: My Managed Groups
- Employee Location: All
- Employee: All
- I-9 Forms: Archival I-9s
- Scope: Primary
- I-9 Error Type: All (highlighted with a red circle)
- I-9 Issues: All

The 'Sort Options' section includes:

- Prim: Transcription Notes
- Direction: A-Z

A table of report entries is visible in the left sidebar:

Name	Created by
Interactive (10044)	Admin, LLX
Interactive (10047)	Reaume, Robert
Interactive (10132)	Reaume, Robert
Interactive (10167)	Reaume, Robert
Interactive (10173)	Reaume, Robert
Interactive (10190)	Reaume, Robert
Interactive (10191)	Reaume, Robert
Interactive (10192)	Reaume, Robert
Interactive (10403)	Reaume, Robert

\* If the HR Filter Group is specified, it will be used instead of the Responsible HR Filter.

# Filter Options

The **I-9 Issues** filter can be used to report on a specific type of issue.

Click **Update Settings** at the bottom of the page to save any changes.

The screenshot shows the LawLogix Reports interface. The top navigation bar includes Dashboard, Start I-9, Employee, E-Verify, and Reports. The left sidebar shows Report Types (All Types, Interactive, Pending Reverifications, I-9 Issues, Employee Groups) and a table of reports for Interactive [All]. The main content area is titled 'Settings' and 'Base Table: I9 Issues'. It contains sections for Scheduler Options, Filter Options, and Sort Options. The Filter Options section is expanded, showing a dropdown menu for 'I-9 Issues' with 'All' selected. The 'I-9 Issues' label in the dropdown is circled in red.

**Report Types**

- All Types
- Interactive
- Pending Reverifications
- I-9 Issues
- Employee Groups

**Reports: Interactive [All]**

Name	Created by
Interactive (10044)	Admin, LLX
Interactive (10047)	Reaume, Robert
Interactive (10132)	Reaume, Robert
Interactive (10167)	Reaume, Robert
Interactive (10173)	Reaume, Robert
Interactive (10190)	Reaume, Robert
Interactive (10191)	Reaume, Robert
Interactive (10192)	Reaume, Robert

**Settings** | Columns | Preview

Base Table: I9 Issues

**Scheduler Options**

Generate Automatically: -- Select Frequency --

Days To Run: -- Select Days To Run --

Must first select frequency above to set how often the report will be generated

**Filter Options**

\* Employee Group: All

Employee Location: Issue Not Ignored

Employee: Issue Ignored

I-9 Forms: I-9 Issues Only

Scope: E-Verify Issues Only

I-9 Error Type: FAR Issues Only

I-9 Issues: Special Issues Only

I-9 Issues: All

**Sort Options**

Primary Sort: N/A - Report Columns Not Yet Defined.

Direction: A-Z

\* If the HR Filter Group is specified, it will be used instead of the Responsible HR Filter.

# Report Columns

Dashboard Start I-9 Employee E-Verify Reports

Report Types

Settings **Columns** Preview

**Tables & Fields**

1) Select Table 2) Select Field 3) Build Fields in Report

Tables	Field Name	Field Name
I-9 Issues		I-9 Number
I9		I-9 Error Count
Employee		Employee Name
Business Unit		Date Hired
		Date Terminated
		I-9 Location
		Error Section
		Error Type
		Error Object
		Error Explanation
		Error Exempted by

Drag selected field to report Drag within list to change order

Refresh Field List Remove Field(s)

Update Settings

From the **Columns** tab specific fields can be added to the report. Click Update Settings after selecting the desired fields.

The fields displayed below provide an effective foundation for an I-9 Issues Report:

## I9 Table

- I-9 Number
- I-9 Error Count
- I-9 Location

## Employee Table

- Employee Name
- Date Hired
- Date Terminated

## I-9 Issues Table

- Error Section
- Error Type
- Error Object
- Error Explanation
- Error Exempted by

# Preview Report Results

After clicking **Update Settings** from the **Columns** tab the **Preview** tab will display automatically and will provide a sample of initial report results. Review the results to determine whether any changes should be made to the **Filter Options** or **Columns** selected.

If any changes are made to the Filters or Columns click **Refresh** on the Preview tab to review updated results.

LawLogix  
by Hyland

Dashboard Start I-9 Employee ▼ E-Verify ▼ Reports

Report Types **Preview**

Refresh Settings: Save Clear Revert Print

I-9 Number	I-9 Error Count	Employee Name	Date Hired	Date Terminated	I-9 Location	Error Section	Error Type
2219943	3	Abbott, Hank	08/03/2017	05/27/2020	Branch 1234	1	Error
2219943	3	Abbott, Hank	08/03/2017	05/27/2020	Branch 1234	1	Error
2219943	3	Abbott, Hank	08/03/2017	05/27/2020	Branch 1234	1	Error
2219943	3	Abbott, Hank	08/03/2017	05/27/2020	Branch 1234	2	Error
2219943	3	Abbott, Hank	08/03/2017	05/27/2020	Branch 1234	2	Error
2219943	3	Abbott, Hank	08/03/2017	05/27/2020	Branch 1234	1	Warning
1879073	0	Allen, Patrick J	07/11/2016		Branch 1234	1	Warning
1879073	0	Allen, Patrick J	07/11/2016		Branch 1234	2	Warning
2570492	3	Andrews, Leon	01/17/2000		DM Import	1	Error
2570492	3	Andrews, Leon	01/17/2000		DM Import	1	Error
2570492	3	Andrews, Leon	01/17/2000		DM Import	2	Error
2570474	2	Bailey, Tony	01/04/2000		DM Import	1	Error
2570474	2	Bailey, Tony	01/04/2000		DM Import	2	Error
2570474	2	Bailey, Tony	01/04/2000		DM Import	1	Warning
2570474	2	Bailey, Tony	01/04/2000		DM Import	2	Warning
1931040	0	Banner, Bruce	05/04/2014		Branch 1234	2	Error

Reports: Interactive [All]

Filter Refresh Report New

Name	Created by
Interactive (10044)	Admin, LIX
Interactive (10047)	Reaume, Robert
Interactive (10132)	Reaume, Robert
Interactive (10167)	Reaume, Robert
Interactive (10173)	Reaume, Robert
Interactive (10190)	Reaume, Robert
Interactive (10191)	Reaume, Robert
Interactive (10192)	Reaume, Robert
Interactive (10403)	Reaume, Robert

employee's hire date.
Required Field if employee is a Lawful Permanent Resident.
The employee did not sign Section 1.
List B must have a document selected if List C has a document selected.
Required Field, must check one of the available boxes.
Required Field. Should not be left blank.
Section 1 is signed after the employee's hire date.
Section 2 is signed more than 3 days after the employee's hire date.
Required Field. Should not be left blank.
Reaume, Robert 2020-11-13 10:23:18.169336-07
The currently selected document is not valid for Reaume, Robert 2020-11-13

# Generating the Report

**Settings**

Employee Location: All

Employee: All

I-9 Forms: Archival I-9s

Scope: Primary

I-9 Error Type: All

I-9 Issues: All

**Date Range**

Date to Search: None

From: None

To: **Date Hired**

Auto Calc: \*

Value	Date Range	Value	Date Range
-30	Last 30 days	60	Next 60 days
m	This Month	-m	Last Month
6m	6th Month	-q	Last Quarter
q	This Quarter	2q	Second Quarter
y	This Year	-y	Last Year

**Sort Options**

Primary Sort: Employee Name

Direction: A-Z

\* If the HR Filter Group is specified, it will be used instead of the Responsible HR Filter

Back on the **Settings** tab, you'll now see an available **Date Range** filter option, provided that one or more qualifying **Date fields** were added as report **Columns**.

The Date Range filter is optional, but can be useful to batch out the issues in to smaller reports for larger Remediation projects.



# Generating the Report

Dashboard   Start I-9   Employee ▾   E-Verify ▾   Reports

**Report Types** Settings   Columns   Preview

Employee Location: All  
Employee: All  
I-9 Forms: Archival I-9s  
Scope: Primary  
I-9 Error Type: All  
I-9 Issues: All

**Date Range**

Date to Search: None

Value	Date Range	Value	Date
-30	Last 30 days	60	Next 60 days
m	This Month	-m	Last Month
6m	6th Month		
q	This Quarter	-q	Last Quarter
2q	Second Quarter		
y	This Year	-y	Last Year

From:   
To:   
Auto Calc:

**Sort Options**

Primary Sort: Employee Name  
Direction: A-Z

 

\* If the HR Filter Group is specified, it will be used instead of the Responsible HR Filter.

**Reports: Interactive [All]**

Filter ▾   Refresh   Report ▾   + New

Name	Created by
Interactive (10044)	Admin, LLX
Interactive (10047)	Reaume, Robert
Interactive (10132)	Reaume, Robert
Interactive (10167)	Reaume, Robert
Interactive (10173)	Reaume, Robert
Interactive (10190)	Reaume, Robert
Interactive (10191)	Reaume, Robert
Interactive (10192)	Reaume, Robert
Interactive (10403)	Reaume, Robert
Interactive (5925)	Porter, Patrick
Interactive (6072)	Porter, Patrick
Interactive (6073)	Porter, Patrick

When ready, from the **Settings** tab click **Run Report Now** at the bottom of the page.

Repeat this step at any time throughout the Remediation efforts to update the report results. The number of issues reported should continually decrease as issues are addressed.

# Downloading to Excel



Dashboard

Start I-9

Employee ▾

E-Verify ▾

Reports

Settings

Columns

Preview

## Report Information

Report Type: Interactive

Created by: Reaume, Robert : 01/11/2021 @ 12:07:12

Last Run: 01/11/2021 @ 12:19:11

Rows X Columns: 161 X 11

[View Report](#) [Download Excel Report](#)

## Report Settings

Report Name:  10403

Base Table: I9 Issues

## Scheduler Options

Generate Automatically:

Days To Run:

Must first select frequency above to set how often the report will be generated

## Filter Options

\* Employee Group:

Employee Location:

Employee:

I-9 Forms:

Click **Download Excel Report** to obtain the report results as an Excel file.

**Note:** If report results exceed 9,999 cells a .Zip containing a TXT file of the results will be provided instead. The TXT file can then be imported as a tab-delimited file in Excel.

# Downloading to Excel

Excel interface showing the **Data** tab selected. The **Filter** button is circled in red. The table below is the data being displayed.

I-9 Number	Error Count	Employee Name	Date Hire	Date Terminate	I-9 Location	Error Section	Error Type	Error Other
Guardian Company - Robert's Site Interactive (10403) Monday, January 11, 2021								
2219943	3	Abbott, Hank	8/3/2017	5/27/2020	Branch 1234	1	Error	Other Names Used
2219943	3	Abbott, Hank	8/3/2017	5/27/2020	Branch 1234	1	Error	Date Signed
2219943	3	Abbott, Hank	8/3/2017	5/27/2020	Branch 1234	1	Error	Phone No
2219943	3	Abbott, Hank	8/3/2017	5/27/2020	Branch 1234	2	Error	Business or Organization Name
2219943	3	Abbott, Hank	8/3/2017	5/27/2020	Branch 1234	2	Error	Citizenship/Immigration Status
2219943	3	Abbott, Hank	8/3/2017	5/27/2020	Branch 1234	1	Warning	Date Signed
1879073	0	Allen, Patrick J	7/11/2016		Branch 1234	1	Warning	Date Signed
1879073	0	Allen, Patrick J	7/11/2016		Branch 1234	2	Warning	Date Signed
2570492	3	Andrews, Leon	1/17/2000		DM Import	1	Error	A#

If desired, Excel filtering can be enabled by selecting the top-left cell of the report table > **Data** tab > **Filter**. Custom filters can then be applied to any of the column headers as desired.

Also consider inserting a **Pivot Table** if further data analysis is required.

# For Additional Assistance

- Select **Help** from the vertical toolbar to access other Guardian tutorials.
- For additional assistance contact your in-house Guardian expert.

# Confidential User Guide

Please do not distribute this document outside of your organization without our written permission.

Thank you.