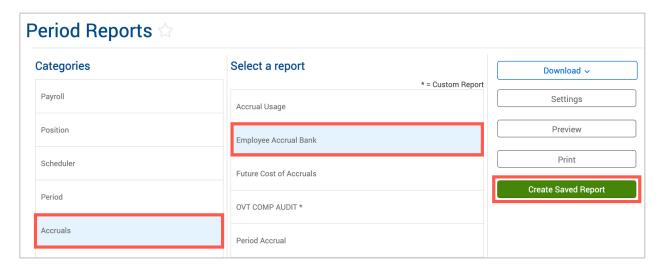


## **Creating a Saved Report**

The purpose of this job aid is to explain how to run the report without having to set up configurations each time.

- 1. In the Period Reports window, select the report you want to start with.
- 2. Click the green Create Saved Report button.



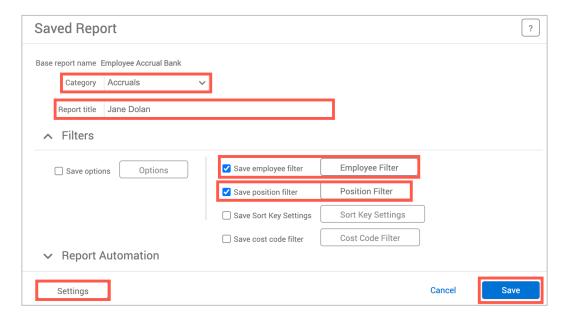
- 3. Click the Category drop-down to choose an existing report category or create a new category by typing it into the box. This represents the section that the report will be filed under when viewing your saved reports.
- 4. Enter a title for the report in the Report title field.
- 5. To choose specific employees to include in the report, check the box for Save employee filter, click Employee Filter, and set the filtering criteria.
- 6. To choose specific positions to include in the report, check the box for Save position filter, click Position Filter and set the filtering criteria.

**Note**: Cost Codes are not used by UTA.

7. If the chosen report has report-specific settings, click on the Settings button at the bottom of the window. These settings will automatically be saved when the report is saved.



8. Click Save.



- 9. The report will now display in your Reports page under the indicated category. The \* indicates it is a Saved report. This new report can be run using the Download button.
- 10. To modify the Saved report, click the "Edit" button under Manage Saved Report.

