

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.

The screenshot shows the 'Period Reports' interface. On the left, under 'Categories', 'Accruals' is selected. In the center, under 'Select a report', 'Employee Accrual Bank' is selected. On the right, the 'Create Saved Report' button is highlighted in green. Other buttons include 'Download', 'Settings', 'Preview', and 'Print'. A note '* = Custom Report' is visible above the report list.

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.

Saved Report [?]

Base report name Employee Accrual Bank

Category Accruals

Report title Jane Dolan

Filters

Save options Options

Save employee filter Employee Filter

Save position filter Position Filter

Save Sort Key Settings Sort Key Settings

Save cost code filter Cost Code Filter

Report Automation

Settings Cancel 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.

Categories

- Payroll
- Position
- Scheduler
- Period
- Accruals**
- Miscellaneous
- Human Resources
- TimeKeeper/Manager

Select a report * = Custom Report

- Accrual Usage
- Employee Accrual Bank
- Future Cost of Accruals
- Jane Dolan ***
- OVT COMP AUDIT *
- Period Accrual
- STR COMP AUDIT *

Download

Settings

Preview

Print

Create Saved Report

Manage Saved Report

Delete

Edit

Edit the saved reports custom settings and automation