UTA
Knowledge Services
OFFICE OF CONTINUOUS IMPROVEMENT

Running a Report

The purpose of this job aid is to explain how to run a report regarding your employees' hours and accruals.

Running a Report

1. Click on Reports, then select Period Reports.

2. Select one of the report categories.

3. Select the report you'd like to run.

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4. Some reports will allow for date entry. If applicable, enter in the date range for the report or select a pre-defined date range from the drop-down.

Note: *If running a report that contains hours, run the report through yesterday. If the report is run through the current date, any employee who is currently clocked-in will be flagged as an exception as TCP will see today's time segment as an incomplete segment.*

5. By default, the report that you run will include all employees. To limit which individuals will appear on the report, set an Employee or Position Filter using the Employee Filter or Position Filter buttons.

Note: *The Employee Filter screen will show the number of employees who fit the filter. You can also preview the report results using the Preview button.*

a. For Position Filters, click the Enable Selection box.

    i. Click the "User accessible only" box to show only the positions accessible to your permissions.

    ii. Chose to Include Selection or Exclude Selection

    iii. Select or search for the position(s) to include or exclude.

b. Click Filter to apply the filter

c. Report filters can be saved to be used in the future by using the Save As button. Once a filter is saved, it can be accessed using the Load button.

d. Filters will be saved while you remain on the Period Reports page. Once you navigate away from the page, they will go back to the default settings.

6. How the report will be sorted can be modified using the Sort Key Settings button. The current sort key settings will be displayed and can be removed using the Unassign icon, and the sort direction can be changed using the slider. Add new sort keys using the Assign button.

Note: *The Sort Key setting changes will remain until you change them.*

7. The Settings button will display report specific settings that can be adjusted. These settings will vary per report depending on the data in the report.

Note: *The Settings set for a particular report will save until you change them.*

8. You can preview the report prior to downloading it using the Preview button. This will display the report on-screen.

9. Click on the Download button to choose which output format you would like to download:

    a. HTML: The output is produced in a .html file that can be opened by a web browser.

    b. PDF: The output is produced in a .pdf file that can be opened in Adobe Reader or another program designed to read .pdf files. As the .pdf report is more difficult to edit than the other formats, many companies use this for producing reports to send out.

    c. OpenXML: The report is produced in a .xml file that can be opened in Microsoft Excel or OpenOffice.

10. Alternatively, click Print to send the report directly to your printer for physical copies.