

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.

The screenshot shows the 'Period Reports' page in the UTA system. On the left sidebar, the 'Reports' menu item is highlighted with a red box, and its sub-item 'Period Reports' is also highlighted with a red box. The main content area is titled 'Period Reports' and includes a search bar, 'Options', '?', and 'Feedback' buttons. Below these are filter buttons for 'Sort Key Settings', 'Employee Filter', 'Position Filter', and 'Cost Code Filter'. The main content is divided into three sections: 'Categories', 'Select a report', and a right-hand panel with action buttons. The 'Categories' section lists various report types, with 'Position' highlighted in blue. The 'Select a report' section lists specific reports, with 'Employee Positions' highlighted in blue. The right-hand panel contains buttons for 'Download', 'Settings', 'Preview', 'Print', and a green 'Create Saved Report' button.

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

This is a close-up view of the 'Select a report' section from the previous screenshot. The 'Employee Positions' report is highlighted in blue and has a red box around it. The 'Position' category in the left sidebar is also highlighted with a red box. The right-hand panel with action buttons is visible on the right side of the image.

- 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.*

- 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

Filter Position [?]

Include All **User accessible only**

Select from list

Include selected ▾

Leave Active only [Search]

<input type="checkbox"/>	1001 [Redacted]	ASSOCIATE DIRECTOR
<input type="checkbox"/>	1001 [Redacted]	Administrative Assistant II
<input type="checkbox"/>	1001 [Redacted]	ASSISTANT DIRECTOR*
<input type="checkbox"/>	1001 [Redacted]	ASSISTANT DIRECTOR*
<input type="checkbox"/>	1001 [Redacted]	Administrative Assistant I
<input type="checkbox"/>	1001 [Redacted]	ASSISTANT DIRECTOR*

Save as Load ▾ Disable Cancel 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.

- 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.*

Unassign	Order	Description	Sort Direction
	1	Last Name	ASC
	2	Classification	ASC
	3	Manager	DESC

- 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.*

- You can preview the report prior to downloading it using the Preview button. This will display the report on-screen.
- Click on the Download button to choose which output format you would like to download:
 - HTML: The output is produced in a .html file that can be opened by a web browser.
 - 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.
 - OpenXML: The report is produced in a .xml file that can be opened in Microsoft Excel or OpenOffice.

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