How do I… Run a Report? For the Advanced User

1. From any *Genie*, **select** the employee(s) name(s) you want to report on.
2. To select more than one employee, **hold down** the *Ctrl or Shift* key and **select** multiple employee names.

   Note: You can also **select** a *HyperFind query* from the *Show drop-down* box at the top of the workspace to determine the people to be processed by the report; not all Reports require a *HyperFind query*.

3. Locate the *Time Period box* in the middle top of the screen. Using the *drop down arrow*, **select** the **date or range of dates** from the *drop down calendar*. **Click OK**.

   Note: Different reports allow for different time periods. Some reports require a specific date. Others use a range of dates. For reports that use a *HyperFind query* but do not return date-specific information, the time period selection applies to the *HyperFind query* only.

4. Access the Reports by **clicking** *Reports* icon in the *Workforce Timekeeper navigation bar*.
5. **Select** the report that you want to run from the list in the *Select Report* tab.
   a. The *Select Report* tab contains a list of all the reports separated into logical groups called categories. There are several report categories including the *All* category, which lists all the available reports in alphabetical order. For your convenience, a report might appear in several categories.
   b. To expand the list of reports in a particular category, **click** the *plus sign* **(+)** to the left of the category name. **Click** the *minus sign* **(-)** to collapse the list.
   c. To select a report, **click** the name of the report in the list; a description of the report appears in the right pane of the workspace.

      Note: You can only view those reports that are allowed by your *Reports Data Access Profile*. You can only view pay codes that are in your *Manager Pay Code Data Access Profile*.

6. In the *Set Options* tab, you can add additional filters to the report and/or change the *E-mail / Schedule format* of the report (if applicable). In order to set options a report must be selected.
7. Setting report options:
   a. Report-specific options—the availability of these options differs for each report; some reports do not use report-specific options. The options available for the selected report will display in the Options list. The possible values for the selected option appear in the *Details frame* to the right of the *Options list*.
   b. E-mail Format—Adobe Acrobat is the default format for reports that are sent as e-mail attachments. This setting is customizable for all reports.
      i. To change the *E-mail / Schedule format* of a report, select a format from the *E-mail / Schedule format* drop-down list.
      ii. Available formats include *Adobe Acrobat Document(.pdf), HyperText Markup Language(.htm), Microsoft Excel Document(.xls), Microsoft Word Document(.doc), and Rich Text Format(.rtf)*.

          Note: Standard reports are optimized for the *Adobe Acrobat Document(.pdf)* format.

8. From the menu bar in either the *Select Report* or *Set Options* tab, **click** *Run Report*.
9. To check on its status while it is running, **click** the *Check Run Status* tab & **Click** *Refresh Status*.
10. When a report is complete, **select** the report in the *Check Run Status* tab and **click** *View Report* to see the generated output.