



Job Aid: Generating & Scheduling Reports

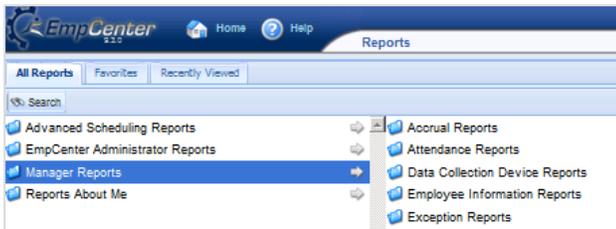
Generating Reports

Reports provide information about timesheet data, time spent on projects, absences, leave balances, information about groups of employees, and more.

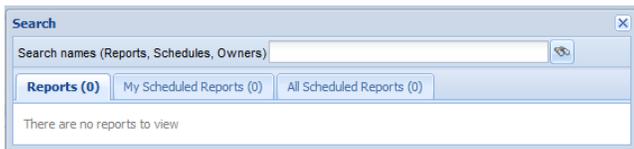
1. To generate a report, click **View Reports** from the **Reports** area on the dashboard.
A list of report categories appears.



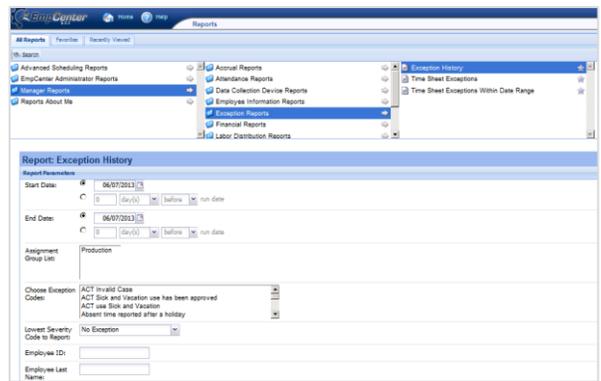
2. Select one of the following options:
 - *Option 1:* Select the report you want to generate (if displayed). Skip to step 0.
 - *Option 2:* **View reports** in a report category.
 - i. Select the category; for example, **Manager Reports**. The right field populates with the various reports or subcategories in that category.



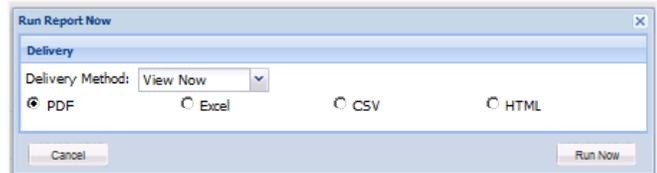
- ii. Select a subcategory if necessary.
 - iii. In the right-most field, select the name of the report to generate. Skip to step 0.
- *Option 3:* **Search** for the report.
 - i. Click the Search button. Search
The **Search** dialog appears.



- i. Enter the name or part of the name of the report in the **Search names** field.
 - ii. Press the **Enter** key (or the button).
- Reports with the search criteria in their name appear in the **Reports** tab.
3. Click the name of the report you want to generate. A second pane appears, allowing you to specify report criteria.
 4. Complete the various fields. **Click Run Report.**



5. Select your preferred output format:



- **PDF** to generate the report in Adobe Acrobat PDF format.
 - **Excel** to generate the output in an Excel spreadsheet.
 - **CSV** to generate the report as a comma-separated values file in plain text.
 - **HTML** to generate the report in your browser window as a web page.
6. Click **Run Now** to process the report. EmpCenter displays the report in a separate window.



EmpCenter

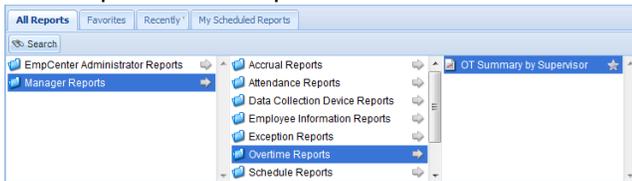
Assignment Group Detail as of 08/19/2015 Hornbeck

Assignment Group	Employee Name	Effective Date	End Effective Date
.Salary			
		01/01/1900	12/31/3000
		01/01/1900	12/31/3000
		01/01/1900	12/31/3000
		01/01/1900	12/31/3000
		01/01/1900	12/31/3000

Creating a Scheduled Report

A scheduled report consists of parameters for running the report, scheduling options which specify the frequency to run the report, duration of the schedule, and email information for delivery of the report.

1. Select a report, opening the **Report** area in the bottom pane of the Reports window.



2. Click the **Schedule** button.
3. Enter/select the parameters for the report.

Report: OT Summary by Supervisor Run Now Schedule

Report Parameters

Start Date: 07/22/2015 0 day(s) before run date

End Date: 07/22/2015 0 day(s) before run date

Assignment Group List: Department 335

Employee ID:

Employee Last Name:

Language for Report Output: English

4. Click **Schedule**. The **Create New Schedule** dialog appears.

Create New Schedule

Delivery

To: ed_supervisor@cookcounty.com

Subject:

Body:

PDF Excel CSV

Scheduling

Report Frequency: Once Daily Weekly Monthly Yearly

Run once on 08/19/2015 at 10:30 am CST

Retain this report schedule after end date

Report will next run on 08/19/2015 with the parameter(s): Start Date: 08/19/2015, End Date:

Schedule Name

Report Schedule Name: OT Summary by Supervisor

*Note: If a validation issue exists with the parameters selected for the report to schedule, a message dialog appears. In this case, click the **OK** button to close the dialog and return to the Reports window.*

5. Enter information and options for the report:
 - In the **Delivery** area, enter at least one email address (separate multiple addresses with a semicolon), enter text for the subject and body of the email, and select a format for the report.
 - In the **Scheduling** area, select the frequency for the report and enter options for the selected frequency in the related fields.
 - In the **Schedule Name** area, enter a name for the scheduled report.
6. Click **Create Schedule**. A message dialog appears for the saved report.



*Note: A confirmation dialog may appear with some scheduling options, for example, when saving the schedule for the 30th of every month. Confirm you want to use the schedule option described in the confirmation message in that case, as some months do not have 30 days, using the last day of the month for those months. Click the **OK** button to confirm the schedule, or click the **Cancel** button to close the confirmation dialog and return to creating the report.*

7. If a validation issue exists with the options for the schedule, a message appears. In this case, click the



OK button to close the message dialog and return to the dialog.

8. Click the **OK** button to close the message dialog and return to the Reports window. The scheduled report appears in the list of scheduled reports in the **My Scheduled Reports** tab.

Report Schedule Name	Report Name	Last Run	Next Run
OT Summary by Supervisor	OT Summary by Supervisor	—	07/31/2015 11:00 ...

9. Click **Preview Report** to generate a report.

