

Job Aid: Run Reports: Basic Tasks

Purpose

The purpose of the Run Reports: Basic Tasks job aid is to guide you through the step-by-step process of using the basic tasks to work with reports in the Talent Management System.

In this Job Aid, you will learn how to:

- Access and Search for Reports
- Run a Report
- Schedule a Report
- Save a Report

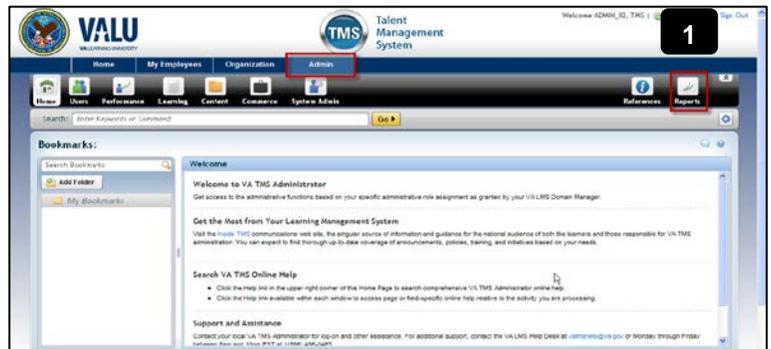


Task A. Access and Search for Reports

Accessing Reports

Note: Verify that the **Admin** tab is selected.

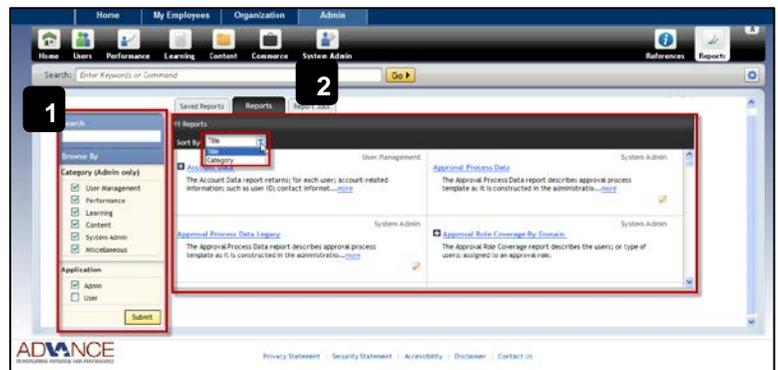
1. Select the **Reports** button.



Searching for Reports:

Use the Search and Browse By features to filter the reports list.

1. Click the **Submit** button. The results list appears on the right side of the screen.
2. Use the **Sort By** drop-down menu to sort the reports listed by *Title* or by *Category*.



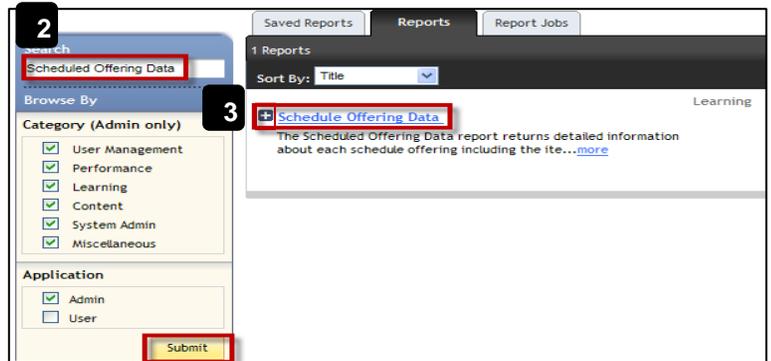
3. Click the **Expand** icon to expand the list of available reports in the report group.



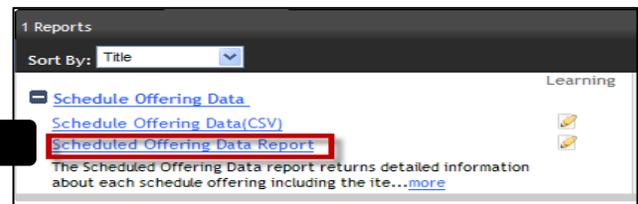
Task B. Run a Report

Note: Verify that the **Admin** tab is selected.

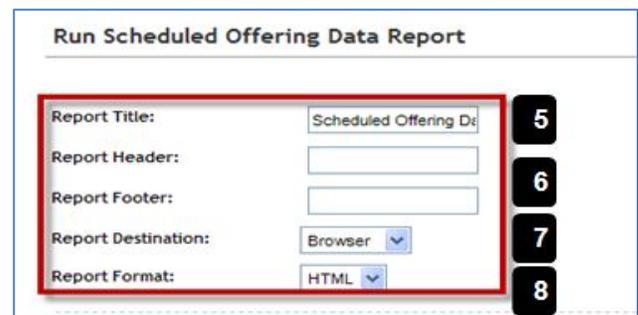
1. Select the **Reports** button.
2. Use the **Search** and **Browse By** features to filter the reports list. Locate the report you want to run. In this example, let's run the **Scheduled Offering Data** report.
3. Click the Expand icon (plus sign) to the left of the **Schedule Offering Data** report group.



4. Select the **Scheduled Offering Data Report** link.



5. Modify the **Report Title** if necessary.
6. Complete the **Report Header** and **Report Footer** fields if necessary.
7. Select a **Report Destination** from the drop-down menu.
8. Select a **Report Format** from the drop-down menu.



9. Click the **Mask User IDs** and/or **Mask Instructor IDs** checkbox(es) as appropriate.
10. Click the **Filter** icon to search for and select the scheduled offering to be reported on.

This screenshot shows a section of the interface with three checkboxes: 'Mask User IDs', 'Mask Instructor IDs', and 'Page Break Between Records'. The first two are checked and highlighted with a red box. A 'Filter' icon (a funnel) is highlighted with a red box and a '1' callout. A '9' callout is also present near the checkboxes.

11. Click the **Run Report** button to generate the report

OR

12. Click the **Schedule Job** button.
13. The Schedule Background Job window displays. See *Task C to schedule a report*.
14. Click **Finish**.

This screenshot shows the 'Schedule Background Job' window. At the top, there are buttons for 'Run Report', 'Schedule Job', 'Save Report', and 'Reset'. The 'Run Report' button is highlighted with a red box and a '1' callout. Below this, there are two radio button options: 'Run this job immediately, if allowable.' (selected) and 'Schedule this job to be executed on: View Available Time Slots'. The second option is highlighted with a red box. Under the second option, there are fields for 'Date', 'Time', and 'Time Zone'. Below that, there are radio button options for 'Daily', 'Weekly', and 'Monthly', with 'Daily' selected. There are also fields for 'Day', 'Date', 'Time of Day', and 'Time Zone'. At the bottom, there is an 'Email the Report' checkbox and 'Reset' and 'Finish' buttons. The 'Finish' button is highlighted with a red box and a '1' callout.

Task C. Schedule a Report

1. Complete Steps 1- 10, and 12 listed above under **Run a Report**.
2. Click the **Schedule this job to be executed on** radio button to schedule the report to run on a specific date and time.
Note: **Click the View Available Time Slots** link to see a list of times you are allowed to run the report
OR
3. Click the **Schedule this job to recur as follows** radio button to schedule the report to run at a specified recurring basis.
4. Click the **Finish** button.

Task D. Save a Report

Talent Profile: Accessing

1. Complete Steps 1-10 listed above under **Run a Report**.
2. Click **Save Report**.
3. Complete the **Saved Report ID** field.
4. Enter a description of the saved report in the **Description** field if desired.
5. Click **Submit**.
6. The saved report displays on the **Saved Reports** tab.
7. To run a saved report, click the **Run** icon in the **Actions** column.

Category	ID	Title	Description	Actions
Learning	TEST01	Scheduled Offering Data Report		Run