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:

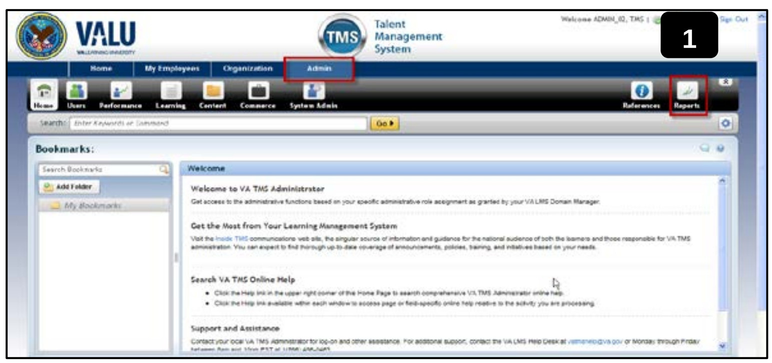
- Access and Search for Reports
- Run a Report
- Schedule a Report
- Save a Report

Task A. Access and Search for Reports

Accessing Reports

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

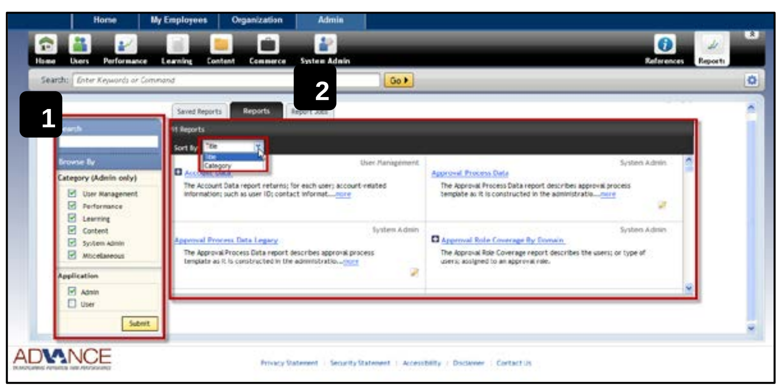
1. Select the **Reports** button.



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*.

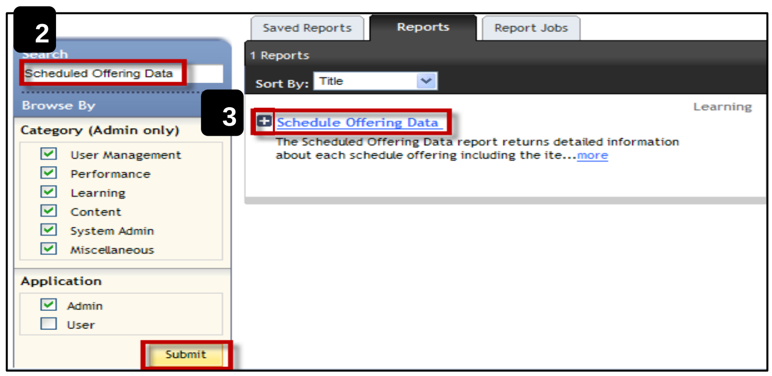


3. Click the **Expand** icon to expand the list of available reports in the report group.

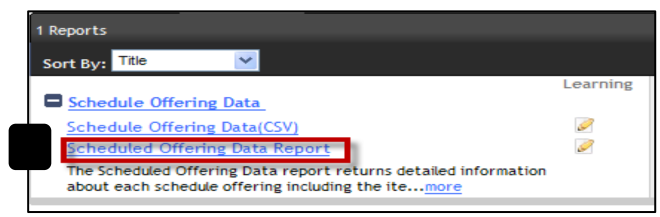
Task B. Run a Report

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

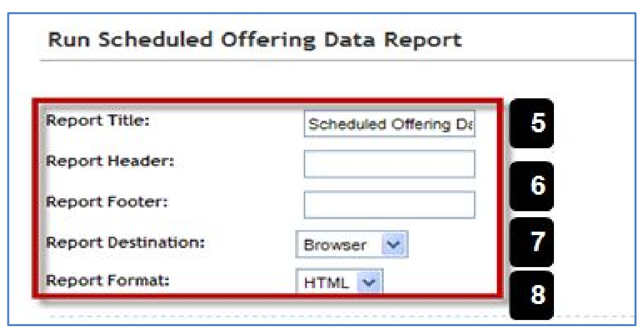
1. Select the **Reports** button.
2. Use the **Search** and **Browse By** features to filter the reports list. Locate the report you want to run. In this example, let's run the **Scheduled Offering Data** report.
3. Click the Expand icon (plus sign) to the lefot of the the **Schedule Offering Data**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



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



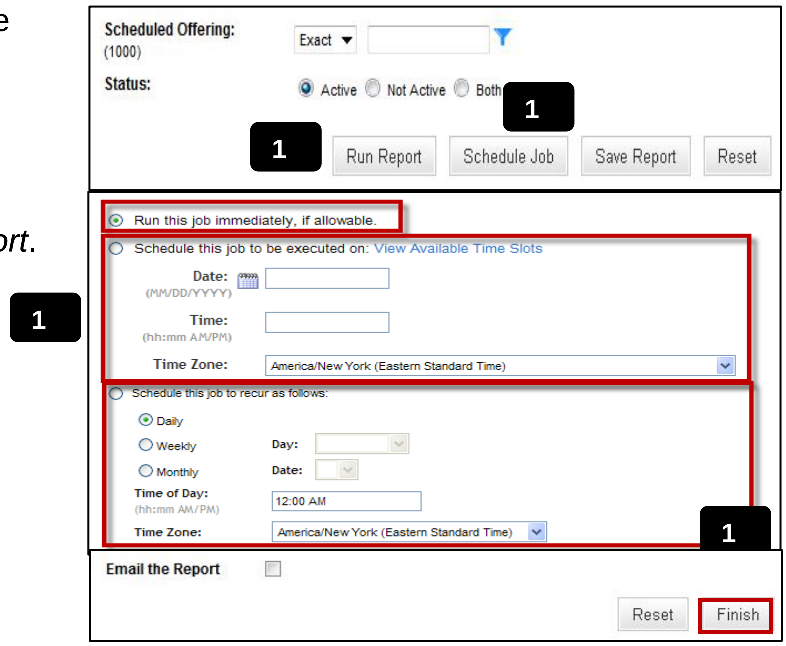
5. Modify the **Report Title** if necessary.
6. Complete the **Report Header** and **Report Footer** fields if necessary.
7. Select a **Report Destination** from the drop-down menu.
8. Select a **Report Format** from the drop-down menu.



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.

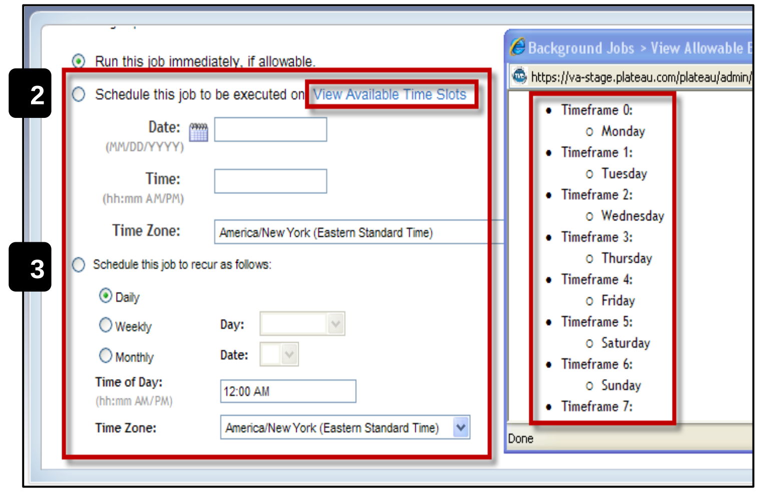
11. Click the **Run Report** button to generate the report

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



Task C. Schedule a Report

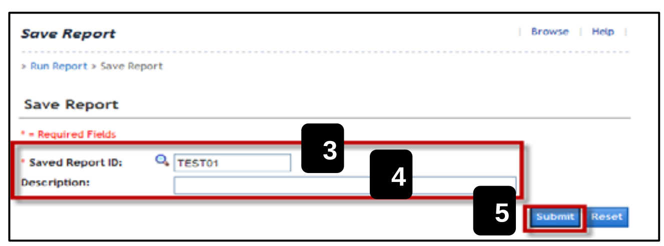
1. Complete Steps 1- 10, and12 listed above under **Run a Report**.
2. Click the **Schedule this job to be executed on** radio button to schedule the report to run on a specific date and time.
   Note: **Click the View Available Time Slots** link to see a list of times you are allowed to run the report
   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.