

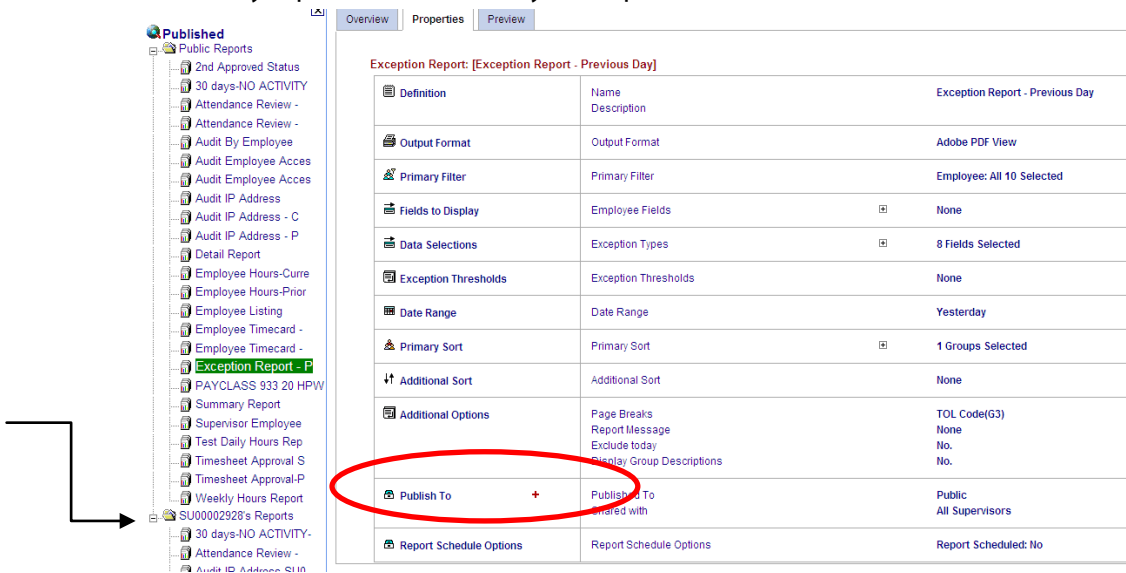
# TIMEONLINE

## Supervisor – Configure Reports

While public reports are quick access to data, you may find that you need a different configuration on a report that is more suitable for your needs. This is easily accomplished by publishing the report to your Supervisor ID and then changing the report properties. It will allow you to personalize the report and run the report any time you need it as well as schedule the report to run automatically and email a copy to yourself.

Notice there is a “Supervisor ID” listed below “Public Reports”. This is your area and the reports you publish will be in this list.

1. Select the “+” next to “Publish” on the “Properties” tab. This will move the report to your individual Supervisor ID.
2. Select any report located under your Supervisor ID section.



The screenshot shows the 'Published' sidebar on the left with a list of reports. The 'Exception Report - P' is highlighted. An arrow points from this report to the 'Properties' tab on the right. The 'Properties' tab shows a table of report settings for 'Exception Report: [Exception Report - Previous Day]'. The 'Publish To' row is circled in red, showing a '+' icon next to the text 'Publish To' and 'Shared with'. The 'Report Schedule Options' row shows 'Report Scheduled: No'.

| Exception Report: [Exception Report - Previous Day] |  |                                    |
|---|--|------------------------------------|
| Definition  | Name<br>Description  | Exception Report - Previous Day    |
| Output Format                                       | Output Format  | Adobe PDF View                     |
| Primary Filter                                      | Primary Filter   | Employee: All 10 Selected          |
| Fields to Display                                   | Employee Fields  | None                               |
| Data Selections                                     | Exception Types  | 8 Fields Selected                  |
| Exception Thresholds                                | Exception Thresholds   | None                               |
| Date Range  | Date Range   | Yesterday                          |
| Primary Sort  | Primary Sort   | 1 Groups Selected                  |
| Additional Sort                                     | Additional Sort  | None                               |
| Additional Options                                  | Page Breaks<br>Report Message<br>Exclude today<br>Display Group Descriptions | TOL Code(G3)<br>None<br>No.<br>No. |
| Publish To  | +  | Public<br>All Supervisors          |
| Report Schedule Options                             | Report Schedule Options  | Report Scheduled: No               |

3. Select the "Blue" down arrows next to any category to see the options and change the report to meet your needs.

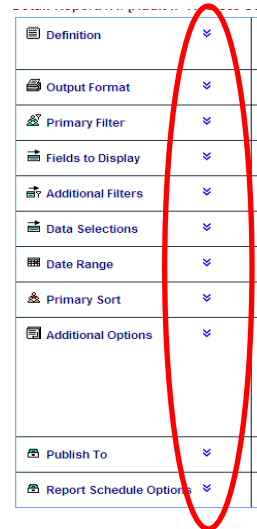
| Category                | Property                    | Value   |
|-------------------------|-----------------------------|---|
| Definition              | Name                        | 30 days-NO ACTIVITY-SU00002928                            |
| Definition              | Description                 | Employees that have not recorded time in the last 30 days |
| Output Format           | Output Format               | Adobe PDF View  |
| Primary Filter          | Primary Filter              | Employee: 8 Selected                                      |
| Fields to Display       | Employee Fields             | 3 Fields Selected   |
| Data Selections         | Time Fields                 | 1 Fields Selected   |
| Exception Thresholds    | Exception Thresholds        | 2 Threshold Values  |
| Date Range              | Date Range                  | Previous Month  |
| Primary Sort            | Primary Sort                | 1 Groups Selected   |
| Additional Sort         | Additional Sort             | 1 Selected  |
| Additional Options      | Page Breaks                 | None  |
| Additional Options      | Sort Items shown as Columns | 0   |
| Publish To              | Published To                | User.   |
| Report Schedule Options | Report Schedule Options     | Report Scheduled: No                                      |

4. Select the "Preview" tab to review and print your report.

## Changing the Report Configuration/Editing the Report Properties

You may now select any report and change the report properties in order to configure your report specific to your needs.

In the report properties section, you will now notice that there are blue "down" arrows next to each selection. This means that you may configure this section (**NOTE:** these blue down arrows are not available in the Public Reports section, as Public Reports are pre-configured).



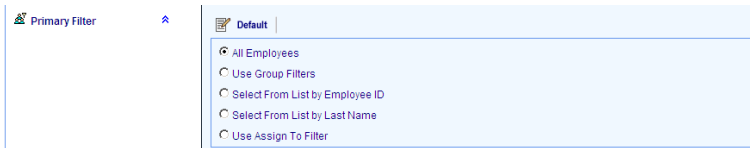
**Definition:** This section allows you to change the name of the report and type a short description.

|            |   |
|------------|---|
| Definition | <p><b>Default</b></p> <p>Name: <input type="text" value="Audit IP Address-SU00002928"/></p> <p>Description: <input type="text" value="Identify which computer was used"/></p> |
|------------|---|

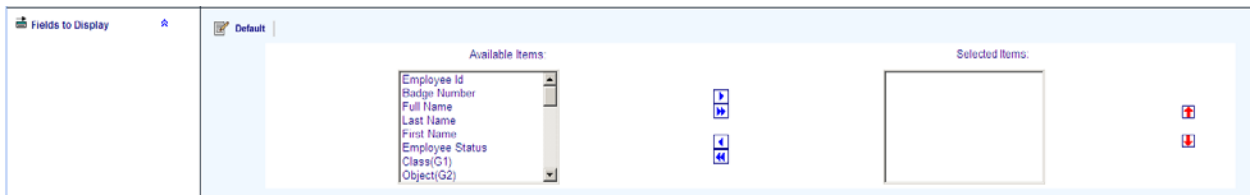
**Output Format:** This section allows you to change the output format. If you select Adobe PDF view and cannot view your report, change the format here, or have your Adobe product updated.

|               |   |
|---------------|---|
| Output Format | <p><b>Default</b></p> <p><input type="radio"/> Adobe PDF View</p> <p><input type="radio"/> Excel Format</p> <p><input type="radio"/> Rich Text Format</p> <p><input checked="" type="radio"/> HTML Format</p> |
|---------------|---|

**Primary Filter:** This will allow you to filter your report. Examples of filters are employee, account, payclass and last name.



**Fields to Display:** This section will allow you to choose what fields will be displayed in your report. Use the arrows to move fields from "Available Items" to "Selected Items".



**Data Selection:** This section will allow you to choose what data you want in your report. Use the arrows to move fields from the "Available Items" to the "Selected Items". (NOTE: Data selection list can vary on each report)



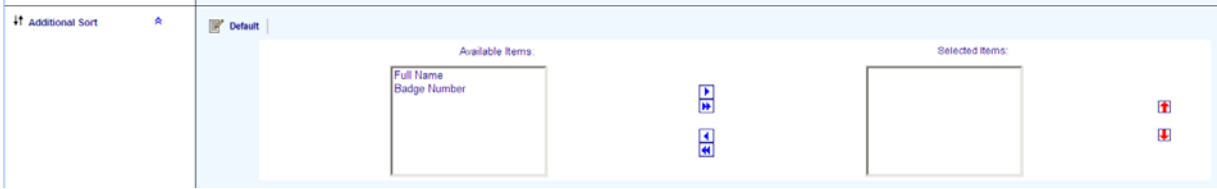
**Date Range:** This will allow you to select a date range for your report, including current and previous pay period.



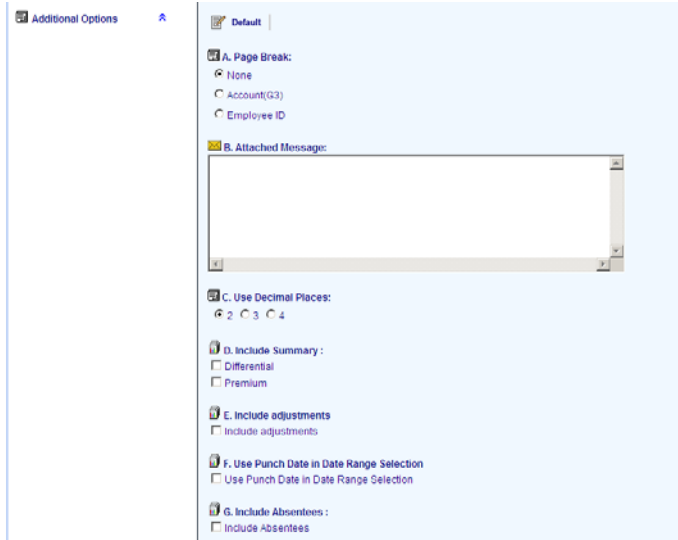
**Primary Sort:** This is the report sort field.



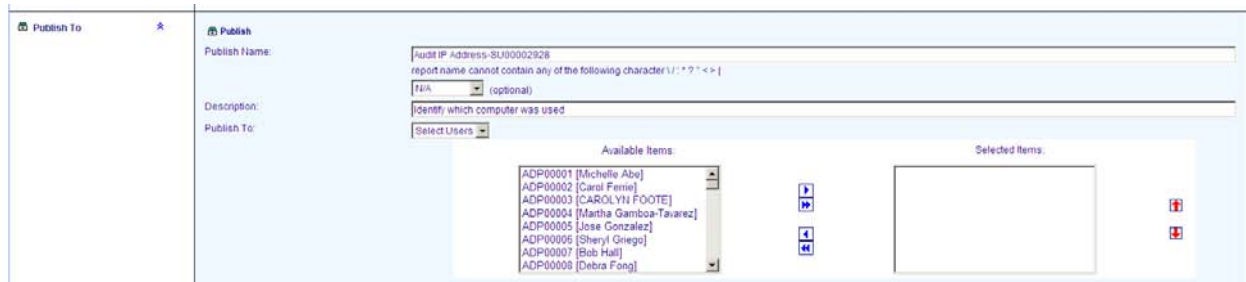
**Additional Sort:** This will allow you to setup secondary sort fields.



**Additional Options:** Sorting options including page breaks. These options can vary for each report.



**Publish To:** This feature was previously used to publish the public report to your supervisor account and will also allow you to publish a report to another supervisor. You should exercise caution when selecting another Supervisor ID for publishing and make sure you have selected the correct supervisor account.



**Report Schedule Options:** This section will allow you to schedule a report to run automatically and send it to your email. This is a convenient way to review a report, such as the employee detail report. You could schedule this report to run each Friday. This will allow a supervisor to review employee time on a weekly basis and look for possible issues such as overtime, fraud, and scheduling concerns.

The screenshot displays the 'Report Schedule Options' configuration page. At the top left, a 'Save' icon is circled in red. Below it, there are radio buttons for 'Report Not Scheduled / Delete Scheduled Report', 'Run Report Once', and 'Run Report Periodically'. Under 'Run Report Periodically', there are radio buttons for 'Daily / Weekly', 'Monthly', and 'Month End'. A 'Week Days' section has checkboxes for Su, Mo, Tu, We, Th, Fr, and Sa. The 'Start Date' is set to 04/25/2012 and the 'Time' is 5:13 PM. The time zone is '(GMT-08:00) Pacific Time(US & Canada); Tijuana'. At the bottom, there is an 'E-Mail User List' section with two columns: 'Available Items' and 'Selected Items'. The 'Available Items' list includes: 3347 [Lisa Macumber FOR Lisa N...], ADP00001 [Michelle Abe], ADP00002 [Carol Fernie], ADP00003 [CAROLYN FODTE], ADP00004 [Manha Gamboa-Tava], ADP00005 [Jose Gonzalez], ADP00006 [Sheryl Greego], and ADP00007 [Dob Hall]. There are blue arrow icons between the columns and red plus icons in the 'Selected Items' column.

Once you have changed the report schedule options, you will need to select the “Save” icon so that the report will be scheduled to run.

All other report configuration fields will remain with the report so that you may run this report anytime you choose from your supervisor report section.

**NOTE:** Report Schedule is the only section that you must use the “Save” icon so that the schedule options are saved.