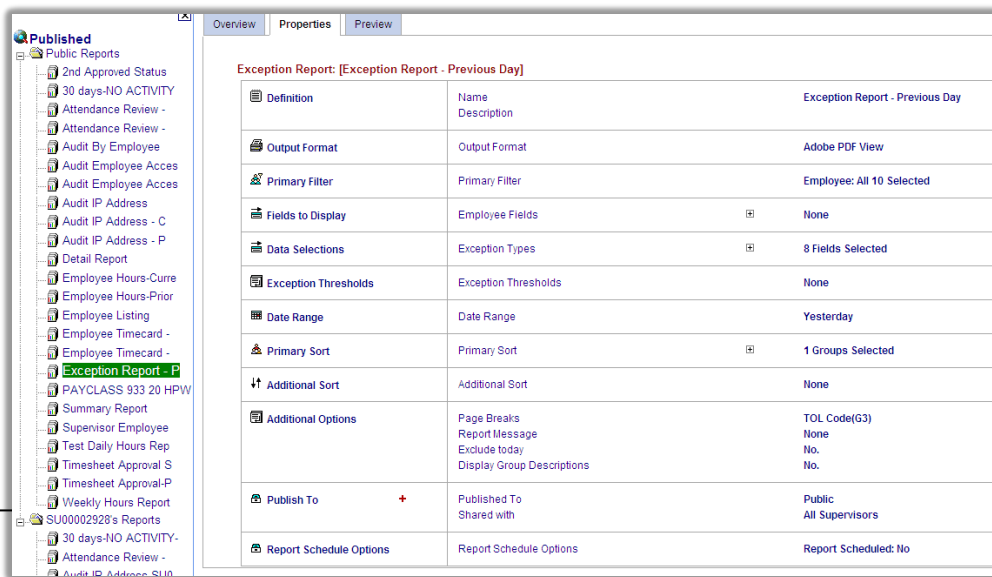


Supervisor – Configure Reports

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.

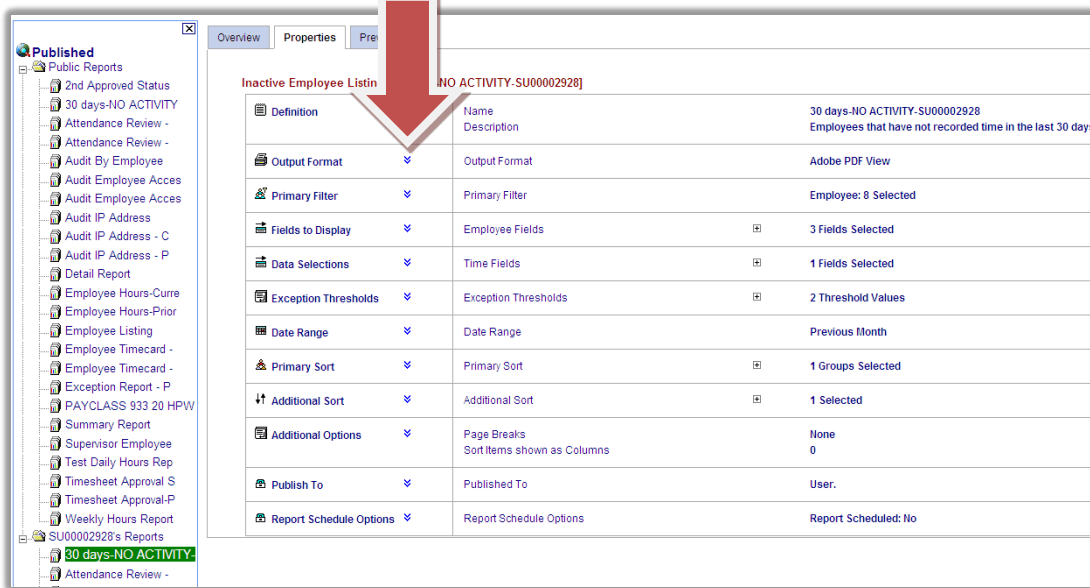
1. Select the “+” next to “Publish” on the “Properties” tab. This will move the report to your individual Supervisor ID.
2. Select any report located under your Supervisor ID section.



The screenshot shows a software interface with a left-hand navigation pane and a main content area. The navigation pane is titled 'Published' and lists various reports. The 'Exception Report - P' is highlighted in green. A line connects this highlight to the main content area. The main content area has tabs for 'Overview', 'Properties', and 'Preview'. The 'Properties' tab is active, showing a table for 'Exception Report: [Exception Report - Previous Day]'. The table has three columns: 'Definition', 'Name', and 'Description'. The 'Publish To' row shows a red '+' icon next to the 'Publish To' label, indicating it can be expanded to show supervisor-specific options.

Exception Report: [Exception Report - Previous Day]		
Definition	Name 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 Report Message Exclude today Display Group Descriptions	TOL Code(G3) None No. No.
Publish To	Published To Shared with	Public 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.
4. Select the “Preview” tab to review and print your report.

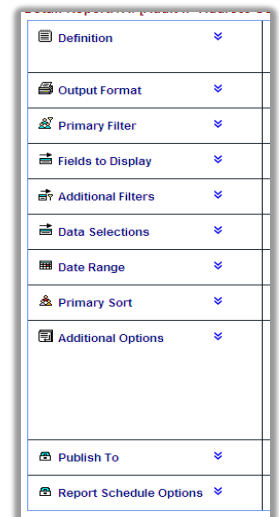


Changing the Report Configuration/Editing the Report Properties

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

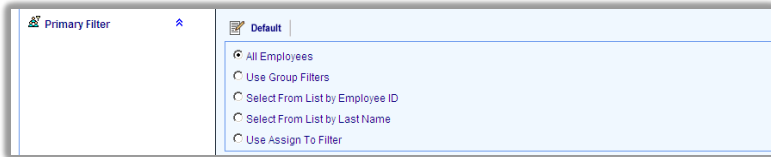
In the report properties section, you will now notice that there are blue “down” arrows next to each selection. This means that you may configure this section (**NOTE:** these blue down arrows are not available in the Public Reports section, as Public Reports are pre-configured).

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

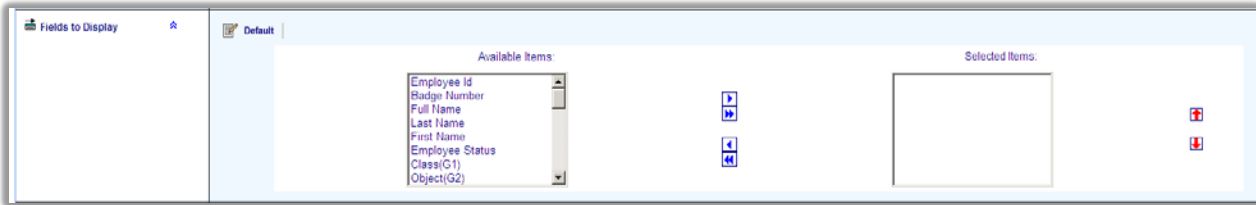


Output Format: This section allows you to change the output format. If you select Adobe PDF view and cannot view your report, change the format here, or have your Adobe product updated.

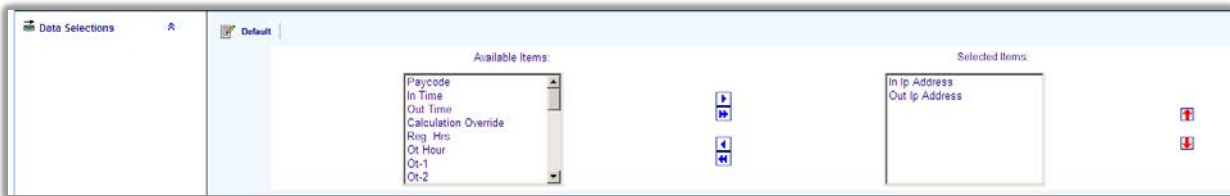
Primary Filter: This will allow you to filter your report. Examples of filters are employee, account, pay class and last name.



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".



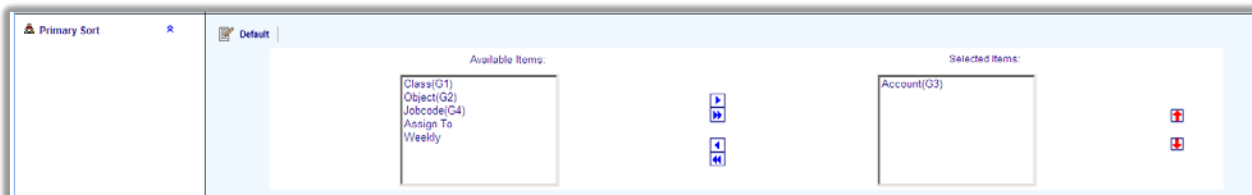
Data Selection: This section will allow you to choose what data you want in your report. Use the arrows to move fields from the "Available Items" to the "Selected Items". (NOTE: Data selection list can vary on each report)



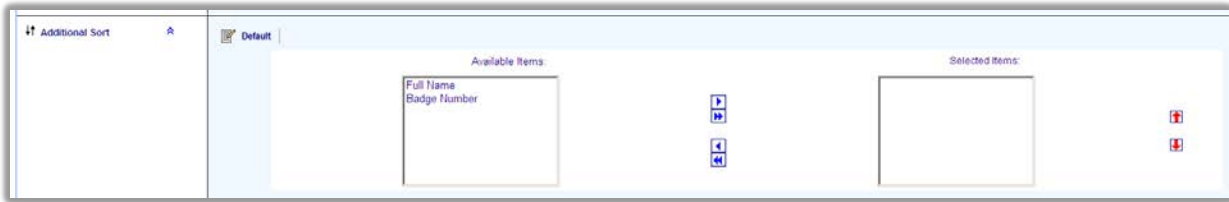
Date Range: This will allow you to select a date range for your report, including current and previous pay period.



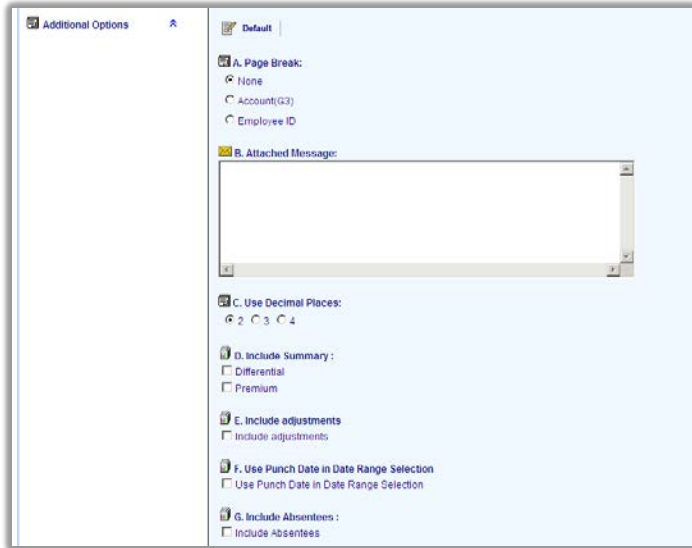
Primary Sort: This is the report sort field.



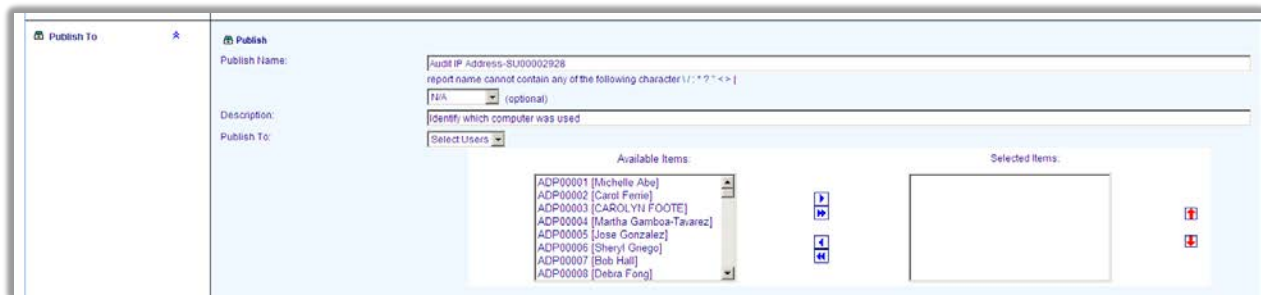
Additional Sort: This will allow you to setup secondary sort fields.



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 shows the 'Report Schedule Options' window. At the top left is a 'Save' icon. Below it, the 'Schedule Period' section has three radio buttons: 'Report Not Scheduled / Delete Scheduled Report' (selected), 'Run Report Once', and 'Run Report Periodically'. Under 'Run Report Periodically', there are three radio buttons for frequency: 'Daily / Weekly' (selected), 'Monthly', and 'Month End'. Below these are two rows of 'Week Days' checkboxes, with 'Su', 'Mo', 'Tu', 'We', 'Th', 'Fr', and 'Sa' all checked. The 'Start Date' is set to '04/25/2012' and the 'Time' is '5:13 PM'. The 'Timezone' is '(GMT-08:00) Pacific Time(US & Canada), Tijuana'. At the bottom, the 'E-Mail User List' section has two columns: 'Available Items' and 'Selected Items'. The 'Available Items' list includes: '3347 [Lisa Macumber FOR Lisa I]', 'ADP00001 [Michelle Abe]', 'ADP00002 [Carol Ferrie]', 'ADP00003 [CAROLYN FOOTE]', 'ADP00004 [Martha Camboa-Tava]', 'ADP00005 [Jose Gonzalez]', 'ADP00006 [Sheryl Griego]', and 'ADP00007 [Bob Hall]'. There are navigation arrows between the columns and a red 'X' icon 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.