Viewing, Printing, and Downloading Reports

HR/Benefits Solution

Overview

After you run a report, you can retrieve it from the Reports Bin. The Reports Bin lists a maximum of 50 reports and their status. Each report stored in the Reports Bin contains a snapshot of the data that existed on the report date at the time you ran the report. If you want to make changes to your data and view the results in the same report, return to the Report Management page, select the template you used to run the report, and generate a new report. You can overwrite the existing report (the one already stored in the Reports Bin), or you can give the new report a different name.

The Reports Bin

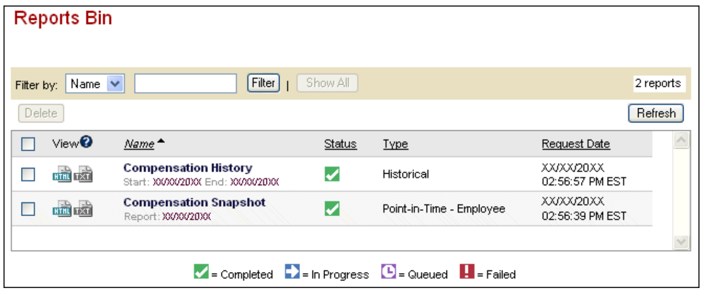
Using the Reports Bin, you can perform the following actions on your reports:

- View
- Print
- Download
- Delete

Accessing Reports

To access your reports, point to the Reports section and select the Reports Bin page. A list of reports and their respective statuses display. You view, print, download, and delete reports from the Reports Bin.

The following is an example of the Reports Bin page.



Elements and Descriptions

The Reports Bin page contains several icons and fields. The following table describes each element.

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>Filter By list</td><td>Select a filter, enter search criteria in the text field, and click Filter to limit the display to specific reports.
<table>
<tr><th>Filter By</th><th>Filter Criteria</th></tr>
<tr><td>Name</td><td>Enter a report name.</td></tr>
<tr><td>Status</td><td>Select one of the following:
• Completed
• In Progress
• Queued
• Failed</td></tr>
<tr><td>Type</td><td>Select one of the following:
• Historical
• Point-in-Time - Employee</td></tr>
</table></td></tr>
<tr><td>Delete button</td><td>Deletes selected report(s) from the Reports Bin. Each manager has a private Reports Bin that holds up to 50 generated reports. When the bin is full, you must delete a report or overwrite an existing one if you want to run a new report.</td></tr>
<tr><td>Refresh button</td><td>When a report is generating, its status is In Progress. To find out whether a report is ready, click Refresh. A status update displays. You can view the report only when its status displays as Completed.</td></tr>
<tr><td>View icons</td><td>Indicates the available display formats for each report. Click HTML or TXT to view the report. Click the Help icon in the View column to view a description of these options.</td></tr>
</table>

Elements and Descriptions (Continued)

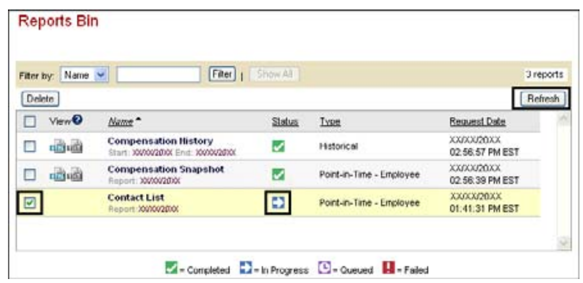
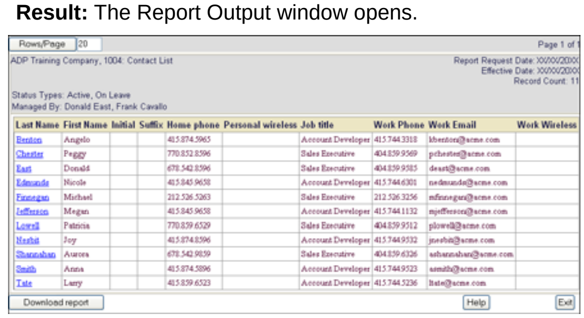
Element	Description
Report date	The date entered in the Report Date field in the Run Report window. The date can be a past, current, or future date. The report date displays only for point-in-time reports.
Start/End dates	The date range entered for the report. A start/end date range displays only for historical reports.
Request Date column	The date and time the report was requested

Viewing Reports

You can view a report when its status displays as Completed.

Instructions

The following table describes how to view a report in HTML format:

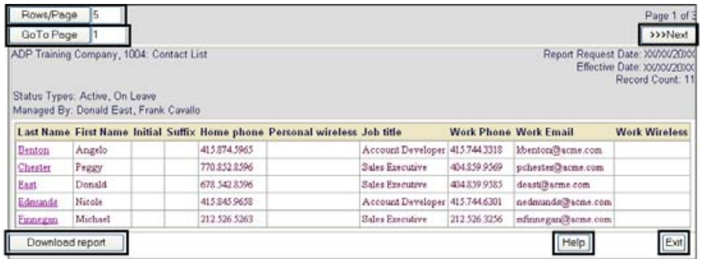
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Point to the Reports section and select Reports Bin.</td></tr>
<tr><td>2</td><td>Select the name of the report you want to view.
Note: Click Refresh until the status displays as Completed.

</td></tr>
<tr><td>3</td><td>Once the status of the report displays as Completed, click the HTML icon for the report.
Result: The Report Output window opens.
</td></tr>
<tr><td>4</td><td>Click Exit to close the window.</td></tr>
</table>

Important Information

- The content of your Reports Bin is private. Only you can view the reports in your Reports Bin.
- When you open a report using the TXT icon, the report displays in the HR/Benefits Solution window. To exit the report, do *not* click the Close button, the X in the upper-right corner of the window. Clicking the Close button will cause you to exit the application. Instead, use the Internet browser's Back button to return to Manager Access. You will return to the My Team > Team Summary page.

The Report Output Window

The Report Output window has several buttons.



Buttons and Descriptions

The following table describes the function of each button in the Report Output window:

Button	Description
Rows/Page	Changes the number of rows that display on the page
GoTo Page	Jumps to another page in your report
Next/Previous	Displays the next or previous page in the report
Download Report	Downloads to a tab-delimited text file
Help	Accesses HR/Benefits Solution Help
Exit	Closes the Report Output window

Important Information

By default, 20 rows of data display on the page. Each row contains one employee record. To change the number of rows that display on a page, enter the desired number in the Rows/Page field and click Rows/Page.

Printing Reports

You can print a report from the Report Output window, or you can download a tab-delimited version of the report and print it in another application.

Instructions

The following table describes how to print a report from the Report Output window:

Step	Action
1	On the Reports Bin page, click the **HTML** icon of the report you want to print. **Result:** The Report Output window opens.
2	Click your browser's **Print** button or select **File** > **Print**.

Important Information

If your report contains more than 20 records, it prints on multiple pages.

To print your entire report, do one of the following:

- Print each page individually by viewing it, printing it, and clicking Next. Repeat this procedure until you have printed all the pages.
- Change the value in the Rows/Page field to the total number of rows or records in your report and print your report. Your printer's setting will determine the location of the page breaks.
- Download the report and open the file in a spreadsheet or database application. Insert customized page breaks, and print your report.

Downloading Reports

Download your reports to a file if:

- You need to sort, reformat, or manipulate the data. Once a report is downloaded and opened in another application, you can print the file.
- You would like to e-mail or archive the report.
- The report has more than 99 records.

Instructions

The following table describes how to download a report, save it as a tab-delimited text file, and open the file in a different application.

Step	Action
1	On the Reports Bin page, select the report to download.
2	Click the **TXT** icon. **Result:** The File Download window opens.
3	Click **Save**. **Result:** The Save As window opens.
4	In the File Name field, enter the name you want to assign to your file.
5	In the Save In list, select the folder to which you want to save your downloaded report.
6	Click **Save**. **Result:** The Download Complete window opens.
7	Click **Close** and navigate to the location of your saved file.
8	Right-click on the downloaded filename, select **Open With**, and then select the application in which you want to open the file.

Important Information

- You also have the option of downloading a report after opening it in HTML format. At the bottom of the Report Output window, click the Download Report button and then click Save. Follow the steps in the preceding table to name and open your downloaded report.
- Each report is saved as a tab-delimited file. If you change the filename extension to .xls in the File Name field during the downloading saving process, your computer will automatically open the file in Microsoft® Excel®. Selecting the application to open the file with is not necessary.

Deleting Reports

The Reports Bin also allows you to delete reports. As a best practice, delete the reports you no longer need because the Reports Bin holds a maximum of 50 reports.

Instructions

The following table describes how to delete a report.

Step	Action
1	On the Reports Bin page, select the report(s) to delete.
2	Click **Delete** and then **OK**.

Important Information

Assume you have 50 reports in your Reports Bin, and you need to create another report. To create a report when your Reports Bin is full, do one of the following:

- You can delete a report from the Reports Bin and then create your report.
- You can overwrite an existing report in your Reports Bin when you create your report. The Run Report window will display a message, "There are (50) reports in your bin. Your bin is full. Please select an existing report to overwrite." Select the report to overwrite in the Existing Reports list, enter a new name in the Report Name field, edit the report date if needed, and click Run Report.

Note: If needed, download and save your reports prior to deleting or overwriting them.

