

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:

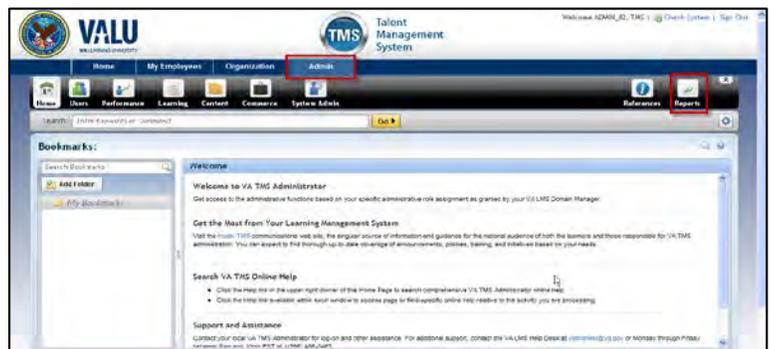
- Access and Search for Reports
- Run a Report
- Schedule a Report
- Save a Report

Task A. Access and Search for Reports

Talent Profile: Accessing

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

1. Select the **Reports** button.

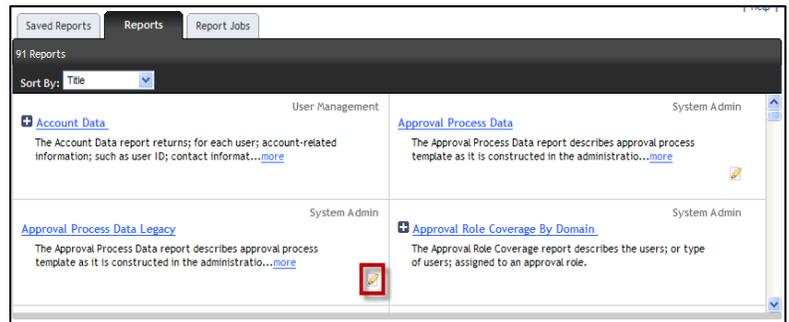


Talent Profile: Adding

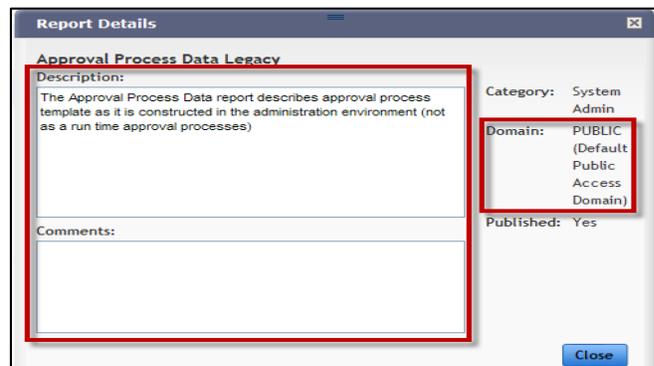
1. Use the **Search** and **Browse By** features to filter the reports list.
2. Click the **Submit** button. The results list appears on the right side of the screen.
3. Use the **Sort By** drop-down menu to sort the reports listed by *Title* or by *Category*.



- Click the **View** icon to view the report details, i.e., description, comments, and domain.
Note: You may also hover over the **more** link to view the report description.

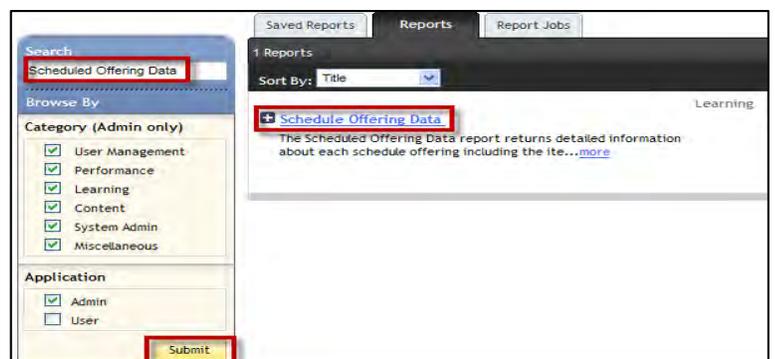


- Click the **Expand** icon to expand the list of available reports in the report group.

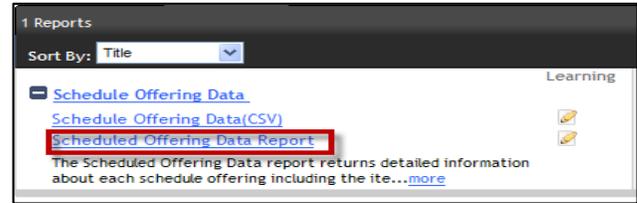


Task B. Run a Report

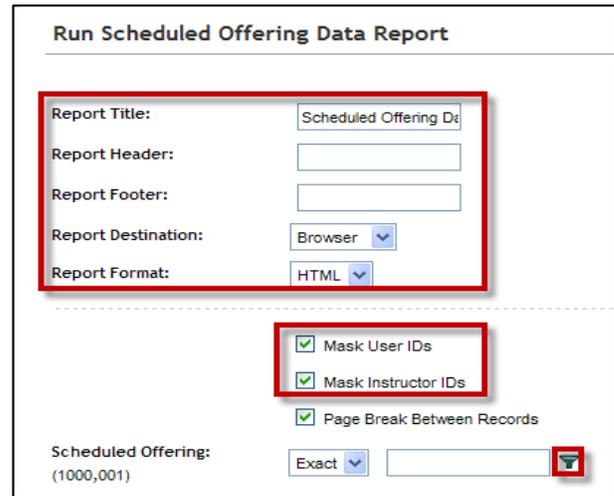
- Note:** Verify that the **Admin** tab is selected.
- Select the **Reports** button.
 - Use the **Search** and **Browse By** features to filter the reports list. Locate the report you want to run. In this example, let's run the **Scheduled Offering Data** report.
 - Click the **Schedule Offering Data** report title link.



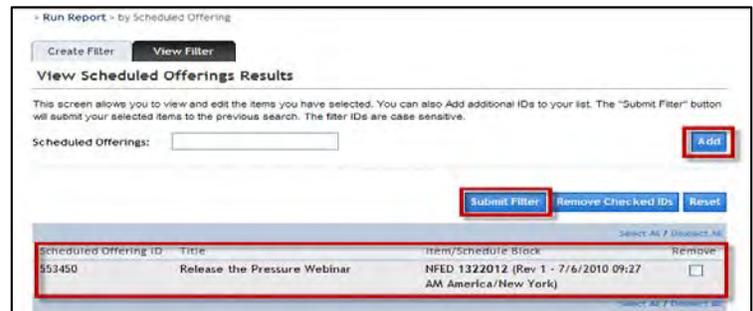
4. Select the **Scheduled Offering Data Report** link.



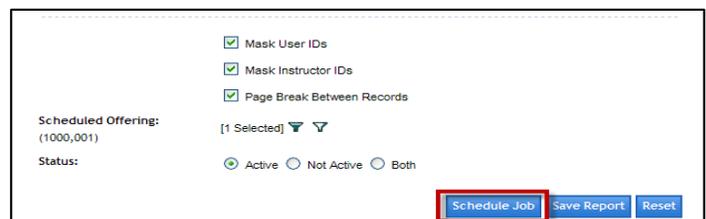
5. Modify the **Report Title** if necessary.
6. Complete the **Report Header** and **Report Footer** fields if necessary.
7. Select a **Report Destination** from the drop-down menu.
8. Select a **Report Format** from the drop-down menu.
9. Click the **Mask User IDs** and/or **Mask Instructor IDs** checkbox(es) as appropriate.
10. Click the **Filter** icon to search for and select the scheduled offering to run this report.



11. Click **Add**. The **Scheduled Offering Data Report** screen appears.
12. Click **Submit Filter**. The **Run Scheduled Offering Data Report** screen appears.



13. Click the **Schedule Job** button to schedule the report to run immediately, once at a future date, or on a recurring basis.



14. Select the radio button for **Run this job immediately, if allowable.**
15. Click **Finish.**

Task C. Schedule a Report

1. Complete Steps 1-12 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 click the Schedule this job to recur as follows radio button to schedule the report to run at a specified recurring basis.
3. Click **Finish.**

Task D. Save a Report

Talent Profile: Accessing

1. Complete Steps 1-12 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.** The saved report displays on the **Saved Reports** tab.
6. 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