

Reporting Example -How to Create Employee Address Report

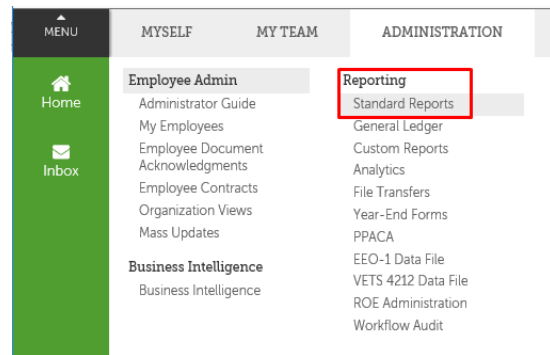
Overview: This job aid demonstrates how to create and generate reports on employee records using the Employee Address report as an example.

The report generating process described here applies to all Standard Reports that are listed. Reports on employee records can be created and viewed by managers and employee administrators.

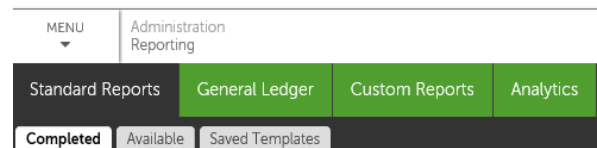
Note: Reports on employee time and attendance are generated in the time and attendance system (UTA). See *Creating Reports Time and Attendance* job aid.

Navigate to (your menus may be different depending on your security access):

1. **Menu > Administration > Standard Reports**
2. **Menu > My Team > Standard Reports**



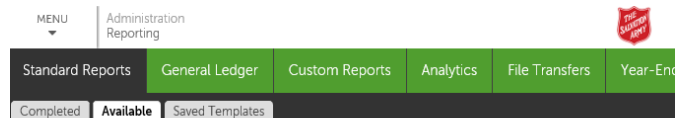
3. You will see the **Completed** Reports tab.
4. Click the **Available** tab.



Completed Reports

Find by Report name starts with

5. In the Search Area, change the middle selection to 'contains' and enter 'address'.
6. Click **Search**. A list of reports that match your search will be shown.
7. Click **Employee Address Listing**.



Available Reports

Role: Manager_THQ

Find by Report name contains address Search

Filtered by Report name - contains address [Clear Filters]

Report Category	Report Name
Employee Management	Employee Address Listing
Employee Management	Employee Address Labels

A new window will open with reporting choices.


Selections are made by clicking an item on the left in the **Available** box, then clicking the right arrow to move it to the **Selected** box. Your choices are limited to those available to you according to your security access.

Report Criteria

Select what information you want in your report. If you don't make any selections, the report will run and give you all address/contact information for everyone you have access to (typically your entire Ministry Unit).

8. For **Company**, select The Salvation Army. You likely have only one choice.
9. For **Selection**, click the droplist and choose what report criteria you want to include:
 - a. For example, select *Department* and then move the a department name to the *Selected* box
10. For **Employee Status**, select the types you would like included
11. Click **Next** (top right).

Employee Address Listing
Jeff Skipper - 0000007 - ZTEST



Report Criteria

← back next → ✓ finish ↺ reset ⊘ cancel 🖨 print 🔍 help

Grouping / Sorting

Report Output

Summary

Report Criteria

Find

Available

- Grace Communities Corporation
- National Recycling Operations
- The Salvation Army - Officers
- The Salvation Army - Pensioners

>>
>
<
<<

***Selected**

- The Salvation Army

Selection: Department

Search available

Available

- NRO Property Management
- NRO Retail Operations
- NRO TS Donation
- NRO TS Production
- NRO TS Retail Operations
- NRO TS Sales
- Nursing Administrator
- Nursing Care

>>
>
<
<<

Search selected

***Selected**

- Nurses

Employee status

Available

- Leave of absence
- On strike
- Released/laid off
- Suspended
- Terminated

>>
>
<
<<

***Selected**


- Active








Grouping/Sorting

Select how you want the report to list the results:

12. Grouping will pull together employees according to the criteria you select, for example, by *Pay Group*. You can make multiple selections.
13. Sorting controls the order in which people are listed. Typically people select *Name*. You can make multiple selections.
14. Click **Next**.

Employee Address Listing
Jeff Skipper - 0000007 - ZTEST



Report Criteria	Grouping / Sorting		      
Grouping / Sorting			
Report Output	Grouping (6 Maximum)		
Summary	Available Div/District Resp/Site Department Region Work Location Pay Group Employee type Country	>> > < <<	Selected Job Code
	Page Breaks <input type="checkbox"/> Job Code		
	Sorting (6 Maximum)		
	Find by <input type="text"/>	Find	
	Available Resp/Site Department Region EmpNo Work Location Pay Group Employee type Country	>> > < <<	Selected Job Code Name (Last, First MI)
	Ascending/Descending <input type="checkbox"/> Job Code <input type="checkbox"/> Name (Last, First MI)		

Report Output

Select how you want the report generated.

15. If you want to give the report a specific name, modify **Name**.
16. If you plan to run this report with the same selections in the future, click **Save Report Template**.
17. Select an expiry date after which the report will be deleted.
18. Select a **File Type** – PDF or Excel. If you want to work with the data, select Excel.
19. Click **Next**.

Employee Address Listing
Jeff Skipper - 0000007 - ZTEST

Report Criteria

Grouping / Sorting

Report Output

Summary


Report Output

Run This Report

Name








Save Report Template

Template name

Expires 

File type

Notes

  |    |  

back next finish reset cancel print help

Summary

20. The Summary screen appears. Review your selections. To change click **Back** to go through the tabs again.
21. When you are ready to run the report click **Finish**.

Report Criteria

Grouping / Sorting

Report Output





Summary

Summary

Request Information

Report Criteria

	Before	Submitted
Country	New	
Calendar period	New	
Payroll cycle type	New	
Company	New	The Salvation Army
Additional employees	New	
Selection	New	Abbotsford Homelessness
Employee status	New	Active

  |  

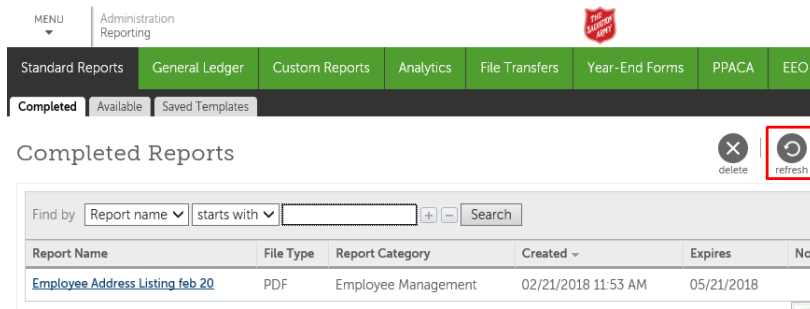
back next finish cancel

Show

Completed Reports

22. Click the **Completed** tab. That is where reports you create are listed.

23. The report will generate in a few minutes. Click **Refresh** to drive the process.



MENU Administration Reporting

Standard Reports General Ledger Custom Reports Analytics File Transfers Year-End Forms PPACA EEO-

Completed Available Saved Templates

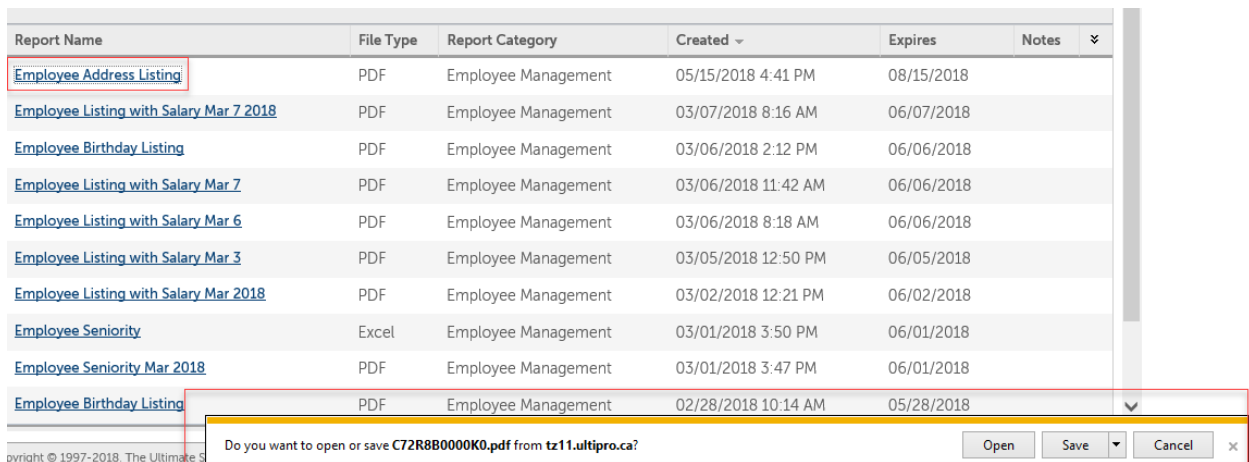
Completed Reports delete refresh

Find by Report name starts with Search

Report Name	File Type	Report Category	Created	Expires	Notes
Employee Address Listing feb 20	PDF	Employee Management	02/21/2018 11:53 AM	05/21/2018	

24. Click the report name to open it. This will either open the file, or open a new window, or download the file.

- If nothing happens, check for a pop-up blocker (see Pop Up Blocker job aid).
- If the file downloaded, check your downloads folder for the file.
- If a new window opens, look in the bottom left corner for an icon representing the report file. Click to open it.
- The example below displays a dialog box for a PDF. Click **Open** to display or **Save** to save to a directory.



Report Name	File Type	Report Category	Created	Expires	Notes	
Employee Address Listing	PDF	Employee Management	05/15/2018 4:41 PM	08/15/2018		
Employee Listing with Salary Mar 7 2018	PDF	Employee Management	03/07/2018 8:16 AM	06/07/2018		
Employee Birthday Listing	PDF	Employee Management	03/06/2018 2:12 PM	06/06/2018		
Employee Listing with Salary Mar 7	PDF	Employee Management	03/06/2018 11:42 AM	06/06/2018		
Employee Listing with Salary Mar 6	PDF	Employee Management	03/06/2018 8:18 AM	06/06/2018		
Employee Listing with Salary Mar 3	PDF	Employee Management	03/05/2018 12:50 PM	06/05/2018		
Employee Listing with Salary Mar 2018	PDF	Employee Management	03/02/2018 12:21 PM	06/02/2018		
Employee Seniority	Excel	Employee Management	03/01/2018 3:50 PM	06/01/2018		
Employee Seniority Mar 2018	PDF	Employee Management	03/01/2018 3:47 PM	06/01/2018		
Employee Birthday Listing	PDF	Employee Management	02/28/2018 10:14 AM	05/28/2018		

Do you want to open or save C72R8B0000K0.pdf from tz11.ultipro.ca? Open Save Cancel