# How to Run a Report

Managers have the ability to generate a report from the Schedule Planner from the Share icon, or from the Report Library under Dataviews and Reports. This includes the location and selected timeframe of the schedule prepopulated in the report settings.

This job aid explains how to run reports.

To run a report:

1. Either Select the Share Icon from the **Schedule Planner** OR Access the Main Menu > Dataviews & Reports > **Report Library**.

2. Click the **Run Report icon.**

3. In the **Select Report** panel, select a category to display the list of reports that you can run.
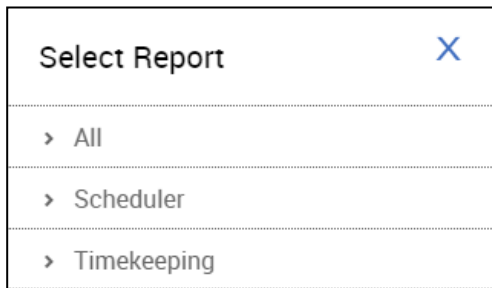
4. Select a report and click **Select.**

5. In the selected report panel, enter the applicable report parameters. Note that many of the parameters are specific to the report you are running, but the following parameters are common to most reports:

   • Timeframe
     – Previous, Current, or Next Pay Period
     – Previous, Current, or Next Schedule Period
     – Week to Date
     – Last Week
     – Yesterday
     – Yesterday, Today, Tomorrow
     – Yesterday plus 6 Days
     – Last 30 Days
     – Current Week
     – Last 90 Days

   You can also click **Select Range** and select the start and end date. Note that the range must be under 365 days.

- Hyperfind

  When you click **Select Hyperfind,** the **Locations & Hyperfinds** panel opens. Here you can select from:

  - Locations

    All Home Locations — Finds current employees assigned to locations to which the manager has access.
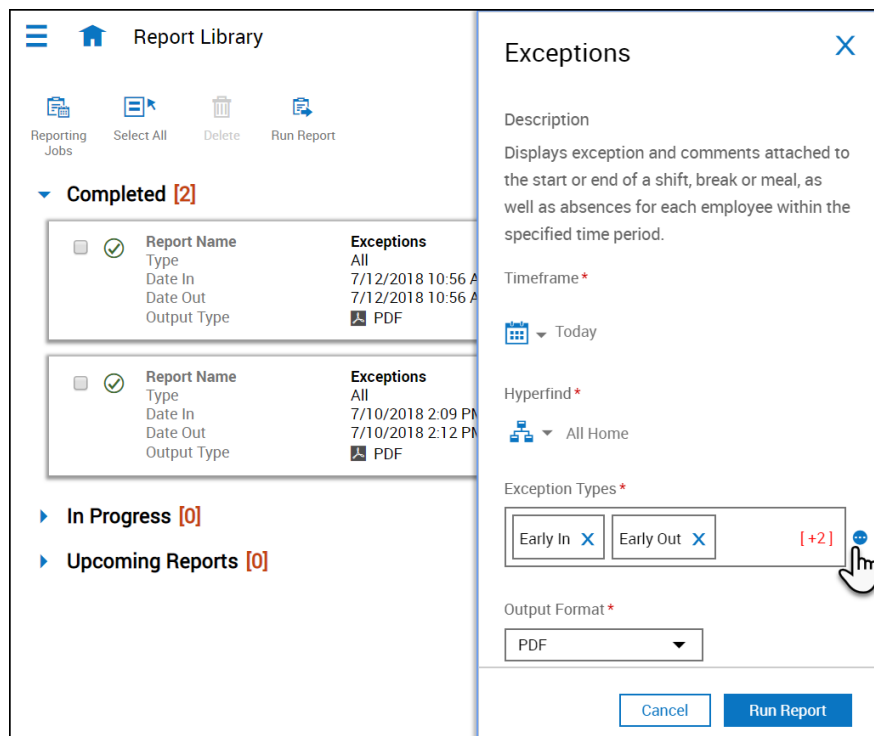
  - Hyperfinds

    All Home — Finds active employees who are part of your employee group.

    All Home and Scheduled Job Transfers* — Finds:

    In addition to your employee group, this includes employees whose primary job is different, but who are scheduled to transfer into your employee group or location.

- Output format
  - PDF
  - Excel
  - Interactive

6. Click **Run Report.** The following message appears:

   In Progress. Report is running.

7. When the report finished, the following success message appears.

8. Click **OK** to open the report.

Report is completed ✓ ✕

Location Schedule Detail - Weekly Report is completed

Ok