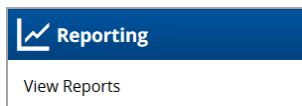


All roles have access to run and view reports in UD WorkForce (UDWF); the type of reports depends on your role(s):

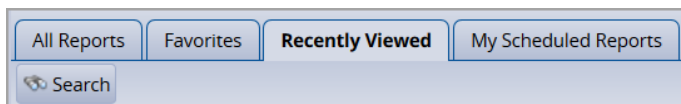
- **Reports About Me - Employee role** – access to reports about their own UDWF records
- **Manager Reports & Administrator Reports - Manager, Timekeeper, HR Manager, Business Officer and Reporter roles**

For more information see the job aids: *Reporting for Employees* and *Reporting for Managers, Timekeepers, HR Managers, Business Officers and Reporters*

1. Log in – go to UD WorkForce <http://www.udel.edu/udworkforce/>
 - a. Click **UD WORKFORCE LOG-IN** button
 - b. At CAS log-in page, enter your **UD User Name** and **Password**
 - c. Click **Log in** button
2. On Home Screen, in the **Reporting** box, click **View Reports**

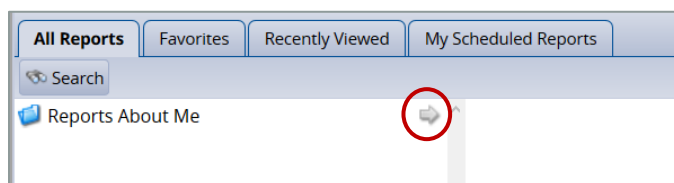


3. The Reports screen features:
 - a. **All Reports** tab – displays all reports you can run
 - b. **Favorites** tab – displays reports you have marked as a favorite with a gold star ★
 - c. **Recently Viewed** tab – displays list of reports you viewed with most recent on top
 - d. **My Scheduled Reports** tab – displays reports...
 - e. **Search** button – use to search for a report by name



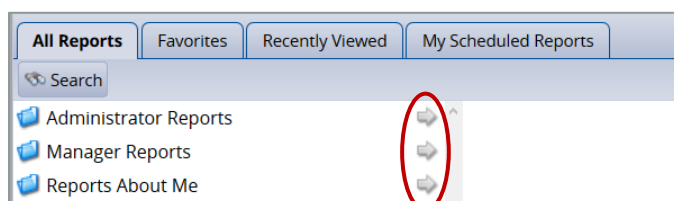
4. The **Reports** screen varies depending on your role(s).
 - a. Click on grey arrows to reveal report types and report names

Employees *without* additional roles will see - **Reports About Me** - reports pertaining to your personal records in UDWF



Employees with roles of Manager, Timekeeper, HR Manager, Business Officer and/or Reporter will see:

- Administrator Reports** - reports pertaining assignments group details and email/messaging.
- Manager Reports** - reports pertaining to employees/assignment groups you have been given access
- Reports About Me** - reports pertaining to your personal records in UDWF



5. Report Parameters
a. Dates (required)

Start Date, End Date – set the data to/from dates with these two fields

Start Date: <input type="radio"/>	<input type="text" value="09/09/2020"/>	End Date: <input type="radio"/>	<input type="text" value="09/09/2020"/>
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Pay Period End Date – this must be an *actual* Pay Period End Date or you will not get results. See [Payroll Deadlines](#) for these dates.

Pay Period End Date: <input type="radio"/>	<input type="text" value="03/21/2020"/>
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b. **Assignment Group List** (required) – choose one or more groups

- Hourly employees** - student workers and misc. wage
- Other employees** - non-exempt/exempt staff, fiscal faculty, adjunct faculty, supplemental professionals, and non-paid
- Union Hourly employees** - AFSCME 439, AFSCME 3472, and casual wage bus drivers

Assignment Group List:	<input type="text" value="Filter Values"/>	Select All Deselect All
<input type="checkbox"/> Hermione Granger's Manager 1 Hourly employees		
<input type="checkbox"/> Hermione Granger's Manager 1 Other employees		
<input type="checkbox"/> Hermione Granger's Manager 1 Union Hourly employees		

c. **Specific parameters or filters** (usually required) – select one or more value (or use **Select All** button)

- Some reports have multiple parameter boxes
- This is an example from the Accrual Report

Accrual Bank:	<input type="text" value="Filter Values"/>	Select All Deselect All
<input type="checkbox"/> Comp Time		
<input type="checkbox"/> Dependent Sick Bank		
<input type="checkbox"/> Long Term Illness		
<input type="checkbox"/> Scheduled Days Counter		
<input type="checkbox"/> Sick		
<input type="checkbox"/> Unpaid Days Counter		
<input type="checkbox"/> Vacation		
<input type="checkbox"/> Work Study		
<input type="checkbox"/> Worked Days Counter		

d. **Employee ID** (optional) – enter an employee’s ID to limit report to a single person

- Use ‘%’ as a wild card. For example, ‘7%’ will return any employee IDs that begin with the number ‘7.’

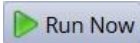
Employee ID:	<input type="text"/>
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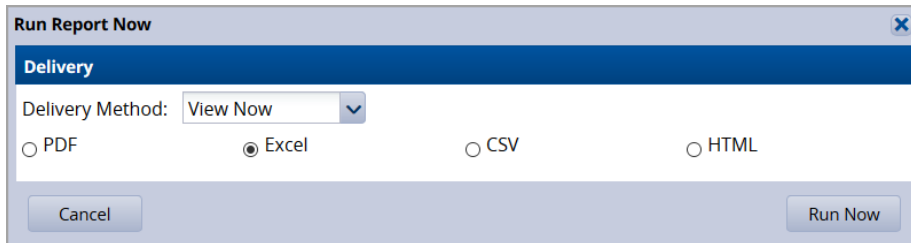
e. **Employee Last Name** (optional) - enter a last name to limit report to a just people with that last name

- Use ‘%’ as a wild card symbol. For example, ‘a%’ will return any last name that begins with the letter ‘a.’

Employee Last Name:	<input type="text"/>
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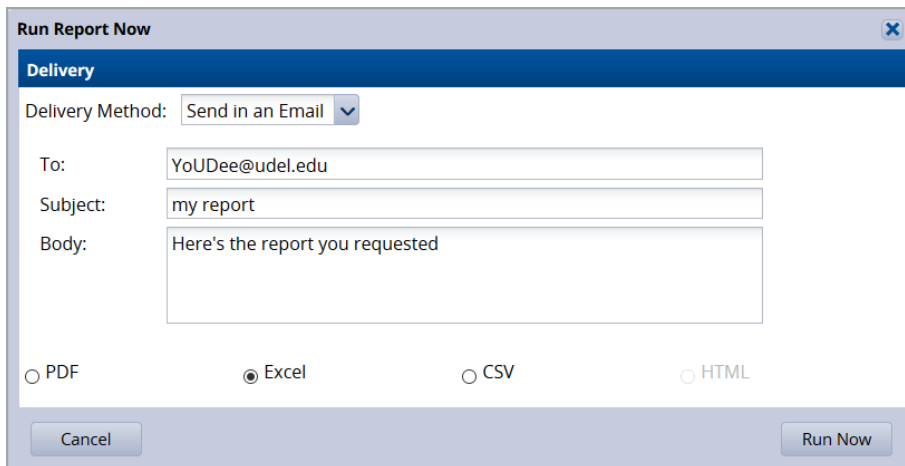
There are two ways to run a report: **Run Now** or **Schedule** (see: page 4)

- f. **Run Now** button - click to run the report immediately 
- **Delivery Method** – choose:
 - **View Now**
 - Select output type (PDF, Excel, CSV, or HTML)
 - Click **Run Now** button



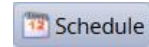
The dialog box is titled "Run Report Now" and has a close button in the top right. The "Delivery" section has a dropdown menu set to "View Now". Below it are four radio buttons: PDF, Excel (selected), CSV, and HTML. At the bottom are "Cancel" and "Run Now" buttons.

- **OR Send an Email**
 - **To** – enter your email or another person’s address
 - **Subject** – enter a subject line
 - **Body** – enter your message
 - Select output type (PDF, Excel, CSV, or HTML)
 - Click **Run Now** button



The dialog box is titled "Run Report Now" and has a close button in the top right. The "Delivery" section has a dropdown menu set to "Send in an Email". Below it are three text input fields: "To:" with "YoUDee@udel.edu", "Subject:" with "my report", and "Body:" with "Here's the report you requested". At the bottom are four radio buttons: PDF, Excel (selected), CSV, and HTML. At the bottom are "Cancel" and "Run Now" buttons.

g. **Schedule** button – click to email the report in the future to yourself or other recipients



- **Delivery**
 - **To** – enter your email or another person’s address
 - **Subject** – enter a subject line
 - **Body** – enter your message
 - Select output type (PDF, Excel, or CSV)
- **Scheduling**
 - **Report Frequency** – select **Once, Daily, Weekly, Monthly** or **Yearly**
 - Other parameters – select date(s), time, day, etc. as appropriate to the frequency
- **Schedule Name** – enter your own name or accept the default report name
- Click **Create Schedule** button

Create New Schedule

Delivery

To: YoUDee@udel.edu

Subject: Monthly Report

Body: Here's the scheduled report.
-YD

PDF Excel CSV

Scheduling

Report Frequency

Once
 Daily
 Weekly
 Monthly
 Yearly

Every 1 months at 12:45 pm EST5EDT

Day 9 of the month
 First Wednesday of the month

Starting On 09/01/2020

Ending On 01/01/2021 No end date

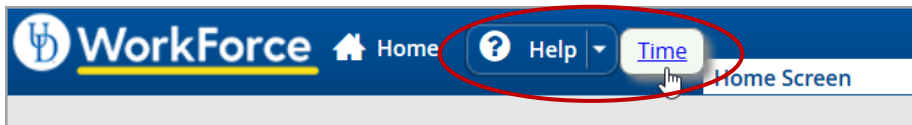
Retain this report schedule after end date

Schedule Name

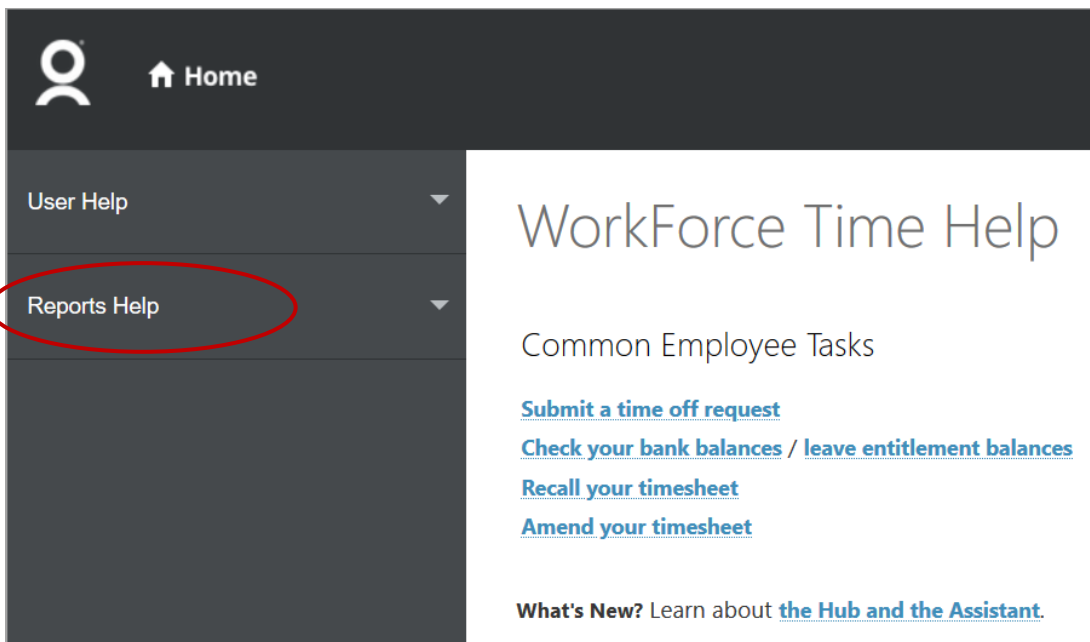
Report Schedule Name My Employee Accrual

Cancel Create Schedule

- 6. You can find additional information about other reports provided by the UD WorkForce system in **Help**. (Note: not all the reports listed in the Help feature apply to UD.)
 - a. On any UD WorkForce screen, click **Help** and then click **Time**



- b. A new window or tab opens, choose **Reports Help**.



- c. Navigate to find information regarding **Generating Reports**.



- d. Navigate to find information regarding details for specific reports in the **Employee Reports** (shown), **Manager Reports** and **Administrator Reports** sections.

The screenshot shows a help page for 'Employee Reports'. On the left is a dark sidebar with a menu. The menu items are: 'User Help', 'Reports Help', '1 Welcome to Time & Attendance', 'Reports Help', '2 Generating Reports', '3 Employee Reports', '4 Manager Reports', and '5 Administrator Reports'. The '3 Employee Reports' item is highlighted with a red rounded rectangle. The main content area on the right has a breadcrumb 'You are here: Reports Help > 3 Employee Reports' and a large heading 'Employee Reports'. Below the heading is an introductory paragraph and a list of links for various reports, including 'Brazil - Employee Time Statement', 'Brazil - Employee Vacation Notice', 'Employee Absence History', 'Employee Absence History Calendar', 'Employee Accrual History', 'Employee Delegation', 'Employee Pending Lines for Approver', and 'Employee Schedule Audit'.

- e. This is an example of the details for the **Employee Accrual History** report:

7.