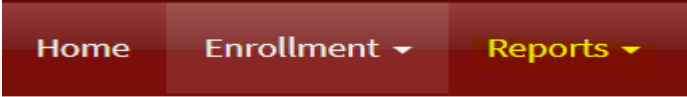

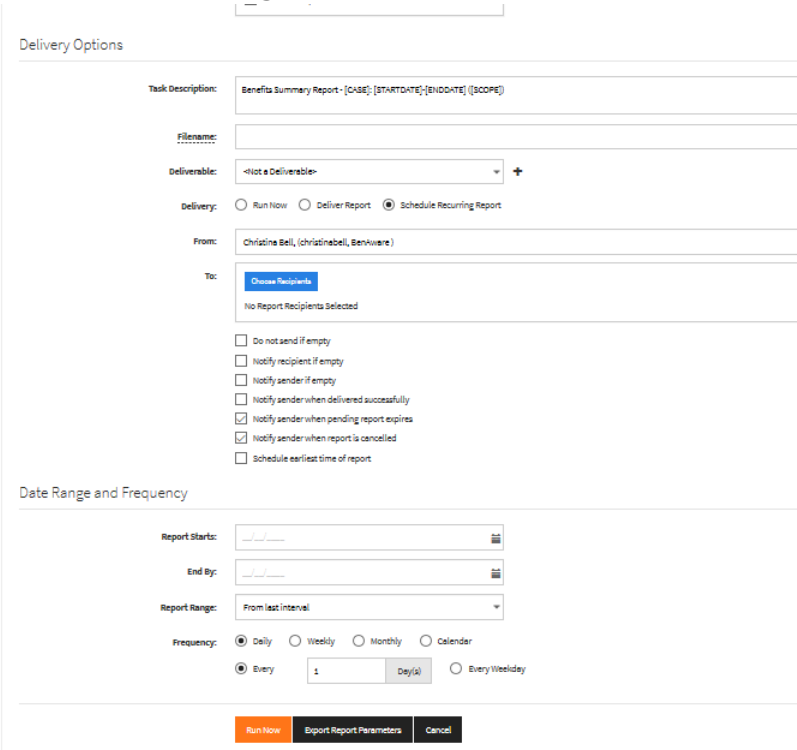


➤ How to Schedule a Recurring Report

| Step | Action |
|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | <p>From the home screen, click on "Report" tab</p>  |
| 2 | <p>Click on "Run Report"</p> |
| 3 | <p>From the Run Report screen, Click in the search box and type the name of the report you want to run - *Make sure the "standard" report option is displayed.* Choose the report you are wanting to deliver form standards or your marked favorites.</p>  |
| Notes | <p>When running any of these reports (clicking "Run Now"), you will be prompted to input/verify the parameters of the report – for example, the Date Range, The Scope (full report or A/C/D (add, change, delete), Employees, Locations, etc.</p> |
| Scheduling a recurring Report | <p>Once you have chosen your scope of information to be displayed on the report, you will click the option</p> |

| | |
|---------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | <h2 style="text-align: center;">"Schedule Recurring Report"</h2>  <p>** If this is a change file and not a full file, I personally like to click the box "Notify Recipient if empty". This allows your recipient, including yourself if you are receiving to disregard empty reports if there are no changes for the designated Report Range.**</p> |
| <p><i>Date Range & Frequency</i></p> | <p>You will need to set the date range for this report. You can make this report run through the whole year. You will also set how often and what day the report will be received.</p> |
| <p><i>Choosing a Recipient, if applicable</i></p> | <p>Clicking on the blue "Choose Recipient" box, you will trigger a large box to open with numerous names. Click on the desired name to receive your report and click OK at the bottom. Now click Run Now. **You will also receive this report if you do not unclick your name in the recipient box.**</p> |
| <p><i>Email Link</i></p> | <p>The person designated to receive delivered report will receive an email with the link the report is ready, they have two options.</p> |

| | |
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| | <p>Option 1: They can click on the link, it will open the portal(they may have to log in again if their session was timed out) and the report will automatically begin to open for them.</p> <p>Option 2: if they do not need the report right away, they may access anytime under "Received Reports" once they log into the portal. Hover over reports and click on Received Reports option.</p> |
| <i>Trouble-shooting</i> | <p>If your report has no data, and you believe there should be, you will need to rerun the report and change the scope of dates, or data you are requesting.</p> |