My Time – How to Run Reports in Excel Format

1. Login to uPortal: http://www.yale.edu/portal
   Access by clicking on ‘My Time’

2. Once logged in, you will be defaulted to the following page. Click on ‘Pay Period Close’.

3. You will be directed to the screen below. Select the employees and the time period that you wish to include in the report. You may select multiple employees or a single employee. This example selects multiple employees. You can also define the time period for your report. This example selects ‘Previous Pay Period’. Once you have selected your employees and defined the time period, click on ‘Reports’ on the top left corner of your screen.

4. You will be directed to the Reports page below. You can select your report by clicking the ‘+’ sign next to ‘All’. For this job-aide, we will run the Employee Transactions and Totals (Excel) report as an example. Select the report and click on ‘Set Options’.
5. Once you click on ‘Set Options’, you will be directed to the screen below. For this report, you may define Actual/Adjusted and Paycode options. We will select ‘Actual Hours’. For Pay Codes, select all paycodes by clicking on the ‘Add All>>’ button.

**NOTE:** Options are not available for all reports; only a few have this feature.
6. To run this report in Excel format, select ‘Microsoft Excel Document (.xls)’ from the drop-down box under E-mail / Schedule Format, located under the Options box.
   NOTE: Only reports with ‘(Excel)’ at the end of the report name are available in Excel format.

7. Once you have selected the Excel format, click on ‘E-mail’ and type in the email address of the recipient(s) to receive the report. Click ‘OK’.
8. Click on ‘Run Report’ and you will automatically be directed to the ‘Check Run Status’ screen.

9. Click on ‘Refresh Status’ button and wait until the ‘Status’ column indicates that the report is ‘Complete’.

10. Once the report has completed, you and/or the recipient will receive the report via an email attachment from ‘kronosweb@yale.edu.’ Double clicking on the attachment will open the report in Excel. The report can then be saved to your computer and/or printed.