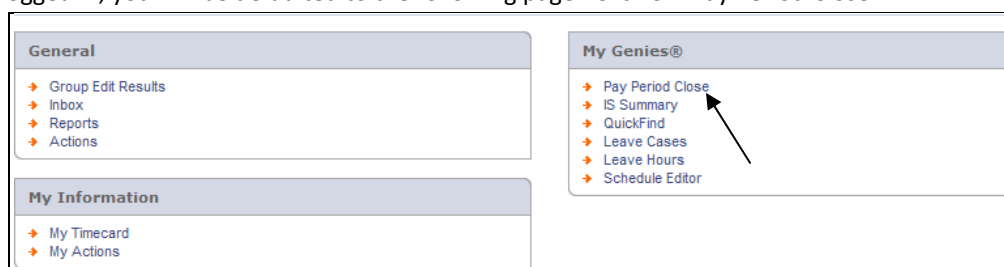


My Time – How to Run Reports in Excel Format

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'.



General

- Group Edit Results
- Inbox
- Reports
- Actions

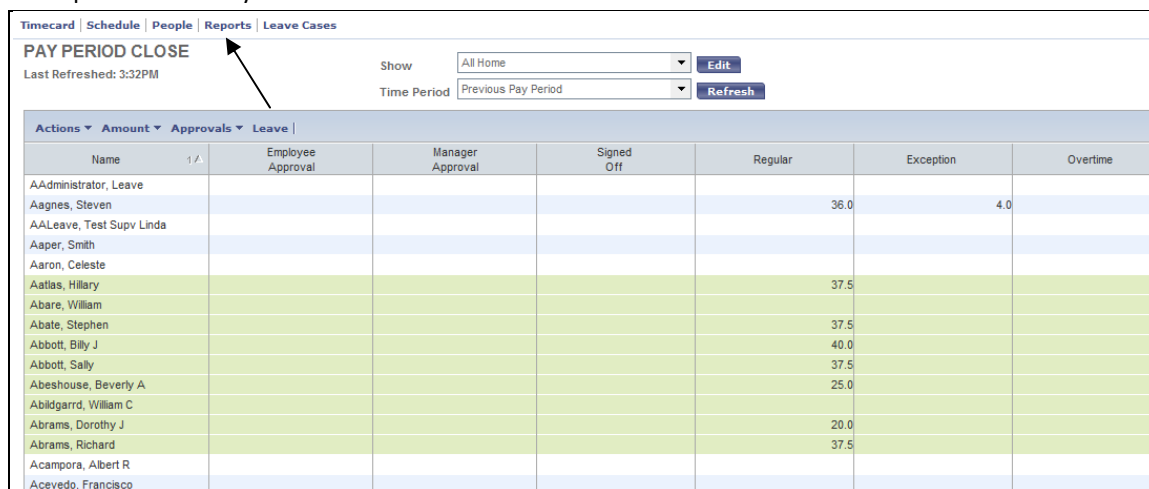
My Information

- My Timecard
- My Actions

My Genies®

- Pay Period Close
- IS Summary
- QuickFind
- Leave Cases
- Leave Hours
- Schedule Editor

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.



Timecard | Schedule | People | **Reports** | Leave Cases

PAY PERIOD CLOSE
Last Refreshed: 3:32PM

Show: All Home [Edit]
Time Period: Previous Pay Period [Refresh]

Name	Employee Approval	Manager Approval	Signed Off	Regular	Exception	Overtime
AAdministrator, Leave						
Aagnes, Steven				36.0	4.0	4
AALeave, Test Supv Linda						
Aaper, Smith						
Aaron, Celeste						
Aatlas, Hillary				37.5		2
Abare, William						1
Abate, Stephen				37.5		
Abbott, Billy J				40.0		
Abbott, Sally				37.5		
Abeshouse, Beverly A				25.0		
Abidgarrd, William C						
Abrams, Dorothy J				20.0		
Abrams, Richard				37.5		
Acampora, Albert R						
Acevedo, Francisco						

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-aid, we will run the Employee Transactions and Totals (Excel) report as an example. Select the report and click on 'Set Options'.

REPORTS
Last Refreshed: 3:33PM

Show:
Time Period:

SELECT REPORT | **SET OPTIONS** | **CHECK RUN STATUS**

Categories

- ☐ All
 - Absent Employees
 - Accrual Balances and Projections
 - Accrual Detail
 - Accrual Summary
 - Actual vs. Schedule by Labor Account
 - Employee Hours by Job
 - Employee Hours by Job (Excel)
 - Employee Hours by Labor Account
 - Employee Hours by Labor Account (Excel)
 - Employee Leave Document Due Dates
 - Employee Schedule - Monthly
 - Employee Schedule - Weekly
 - Employee Sign-off
 - Employee Transactions and Totals
 - Employee Transactions and Totals (Excel)
 - Hours by Labor Account
 - Hours by Labor Account (Excel)
 - Hours by Labor Account with Graph Summary
 - Leave Hours Detail
 - Leave Hours Summary
 - Leave Hours Summary (Excel)
 - Leave Reasons
 - Leave Trends

- 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.

REPORTS
Last Refreshed: 3:40PM

Show:
Time Period:

SELECT REPORT | **SET OPTIONS** | **CHECK RUN STATUS**

Options

- ☐ Actual/Adjusted
- ☒ Pay Codes

Employee Transactions and Totals

Pay Codes

Available	Selected
	SICK
	PERSONAL
	VACATION
	BONUS VACATION
	COMP TIME TAKEN
	COMP TIME EARNED
	DEATH
	DEPT PAID UNION
	DEPT PAID WC
	EARNED FLOATING HOLIDAY
	EMPLOYEE REFERRAL BONUS
	FLOATING HOLIDAY
	HOLIDAY RECESS PREMIUM
	JURY DUTY

E-mail / Schedule Format

- 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.

REPORTS
Last Refreshed: 3:03PM

Show: Local 35 Accrual [Edit]
Time Period: Current Pay Period

SELECT REPORT **SET OPTIONS** **CHECK RUN STATUS**

Run Report Refresh Schedule → E-mail → Send To Printer → Print Screen →

Options
☐ Actual/Adjusted Pay Codes

E-mail / Schedule Format
Adobe Acrobat Document(.pdf)
Adobe Acrobat Document(.pdf)
Microsoft Excel Document(.xls)

Employee Transactions and Totals (Excel)

Details

- 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'.

REPORTS
Last Refreshed: 3:36PM

Show: Local 35 Accrual [Edit]
Time Period: Current Pay Period

SELECT REPORT **SET OPTIONS** **CHECK RUN STATUS**

Run Report Refresh Schedule → **E-mail →** Send To Printer → Print Screen →

Options
☐ Actual/Adjusted Pay Codes

Employee Transactions and Totals (Excel)

Details

E-mail
Recipients: [Example: person1@company.com, person2@company.com]
OK Cancel Help

Java Applet Window

- Click on 'Run Report' and you will automatically be directed to the 'Check Run Status' screen.

REPORTS
Last Refreshed: 3:45PM

Show:
Time Period:

SELECT REPORT **SET OPTIONS** **CHECK RUN STATUS**

Report Name	Format	Date In	Date Done	Status
Employee Transactions and Totals	pdf	Mon 10/19/2009 03:45:15PM		Waiting

- Click on 'Refresh Status' button and wait until the 'Status' column indicates that the report is 'Complete'.

REPORTS
Last Refreshed: 3:47PM

Show:
Time Period:

SELECT REPORT **SET OPTIONS** **CHECK RUN STATUS**

Report Name	Format	Date In	Date Done	Status
Employee Transactions and Totals	pdf	Mon 10/19/2009 03:45:15PM	Mon 10/19/2009 03:45:20PM	Complete

- 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.