
TMS 2.0
VA
Admin Job Aid
Run Reports

Admin Job Aid: Run Reports

(Revision date: September 11, 2020)

Purpose

The purpose of this job aid is to guide you through the step-by-step process of running a report.

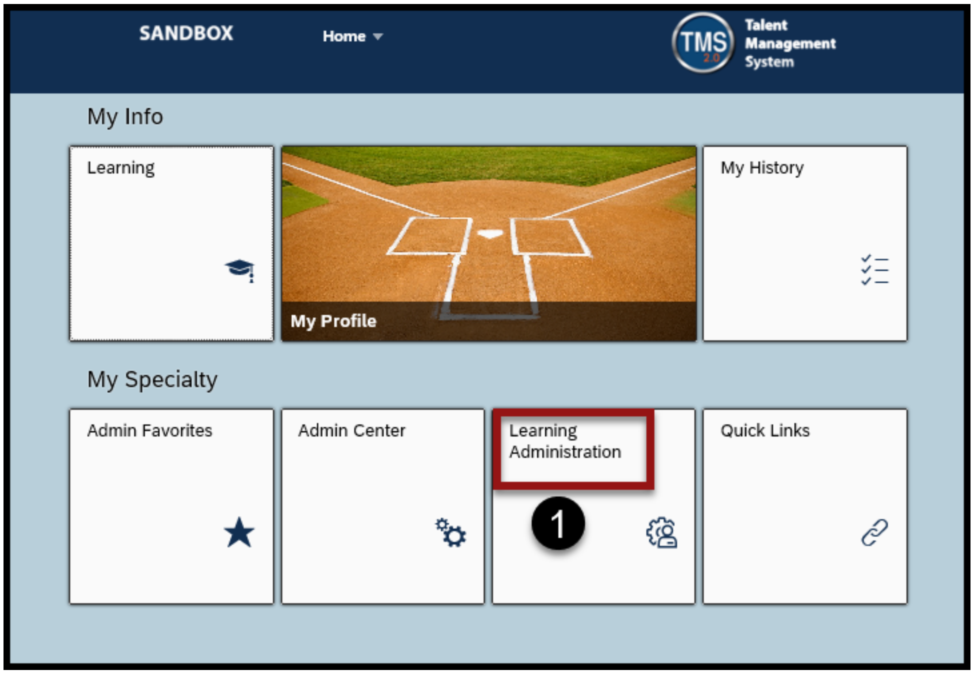
In this job aid, you will learn how to:

- Task A. Search for Reports
- Task B. Run and Schedule a Report
- Task C. Save a Report

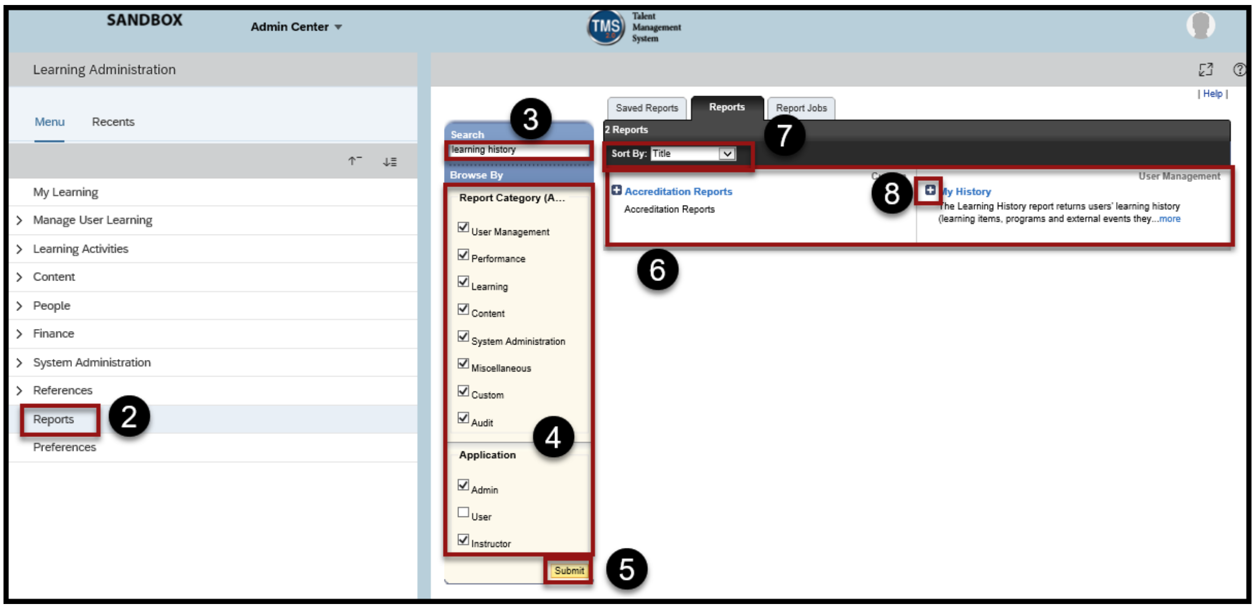
Talent
Management
System

Task A. Search for Reports

1. Select **Learning Administration**.

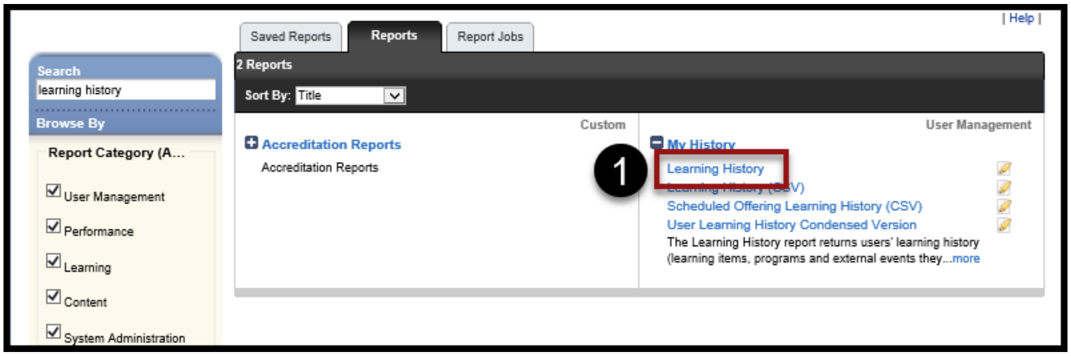


2. Select **Reports**.
3. Enter keywords in the **Search textbox**.
4. Select and deselect checkboxes in the **Browse By** section.
5. Select **Submit**.
6. The **Reports Results** appear on the right-hand side of the page.
7. Use the **Sort By** drop-down list to sort the reports by Title or by Category.
8. Select the **Expand icon** (plus sign) to view a list of available reports in the report group.

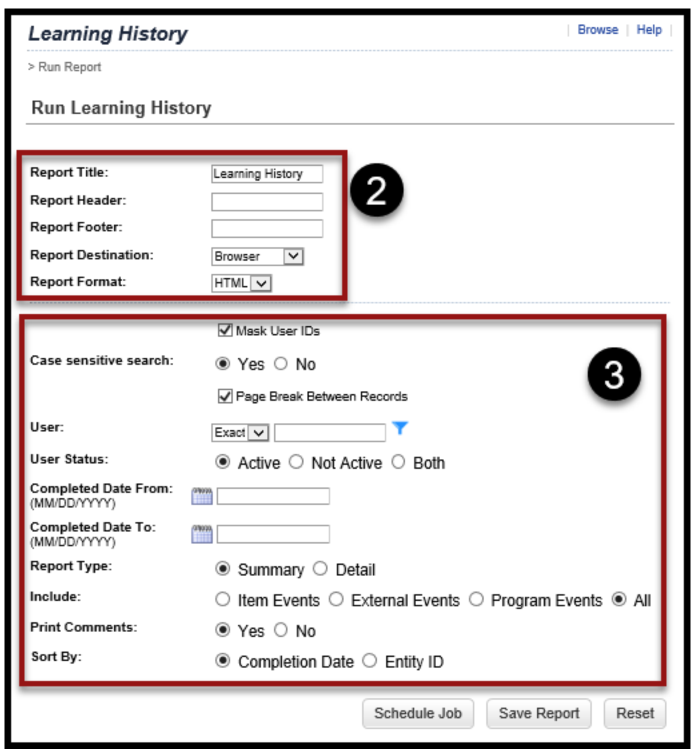


Task B. Run and Schedule a Report

1. **Select the report** you want to run after expanding the list of available reports in the report group.



2. There are two sections of the Run Report screen. The upper part of the page is called the **Formatting** section.
3. The lower part of the Run Report screen is called the **Criteria** section.

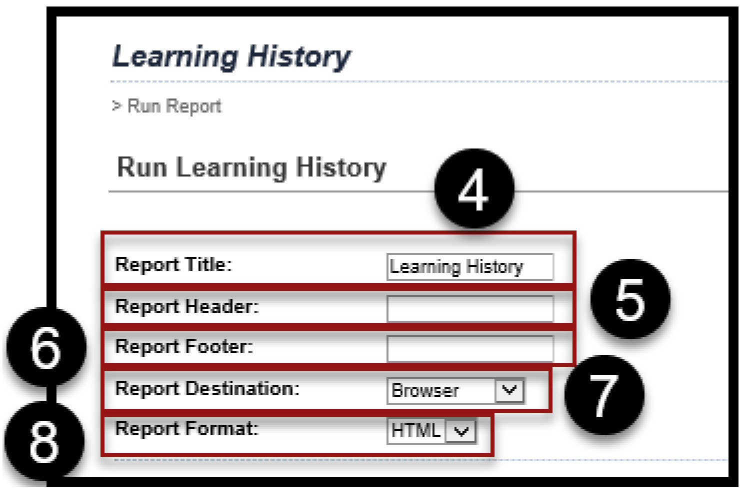


4. (Optional) Modify the **Report Title**.
5. (Optional) Enter a **Report Header**.
6. (Optional) Enter a **Report Footer**.
7. Select a **Report Destination** from the drop-down list.

NOTE: If you select a CSV (Comma Separated Value) Report, then the report destination you must select is Local File.

NOTE: Although there are three options listed (Browser, Local File, Remote File), the VA does not use Remote File. Never select that option.

8. Select a **Report Format** from the drop-down list.



9. **Mask User IDs, Case Sensitive Search**, and **Page Break Between Records** are filled out by default, but you can edit those settings as needed.
10. Select the **Filter Icon** (blue funnel) to search for and select the users you want to run the Learning History report on.
11. Select the **Calendar Icon** to input the date range from which the Learning History data will be drawn.

NOTE: There are additional settings filled out by default. You can change the settings by selecting a different radio button.

12. Select **Schedule Job**.

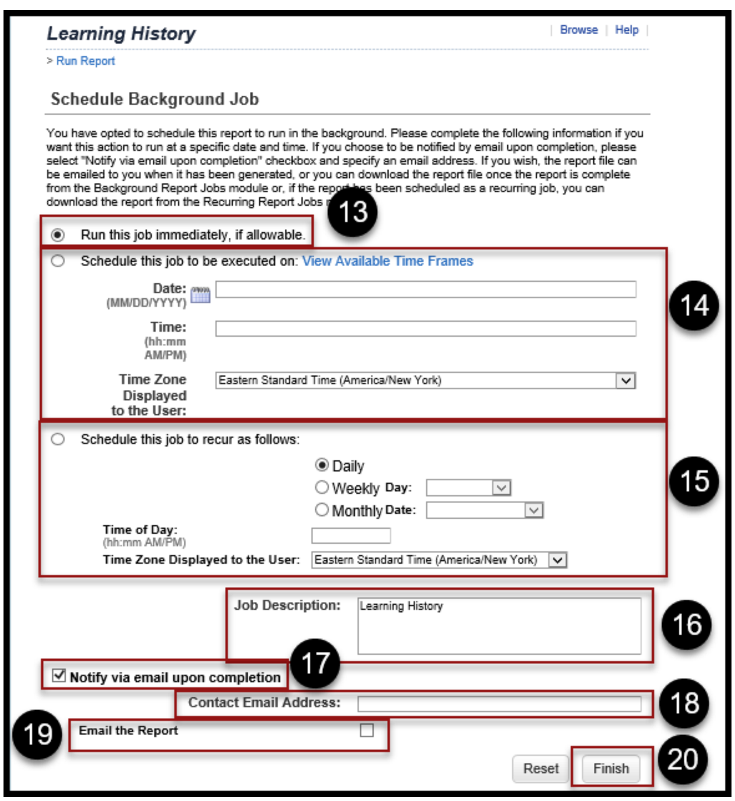
13. There are three different options for scheduling the report. Select **Run this job immediately, if allowable** radio button if the report needs to be run right away.
14. Select the **Schedule this job to be executed on** radio button to schedule the report to run on a specific date and time. Select the View Available Time Frames link to see a list of times you are allowed to run the report.

NOTE: You must enter the future Date, Time, and Time Zone that you want the report to be run.

15. Select the **Schedule this job to recur as follows** radio button to schedule the report to run on a specified, recurring schedule.

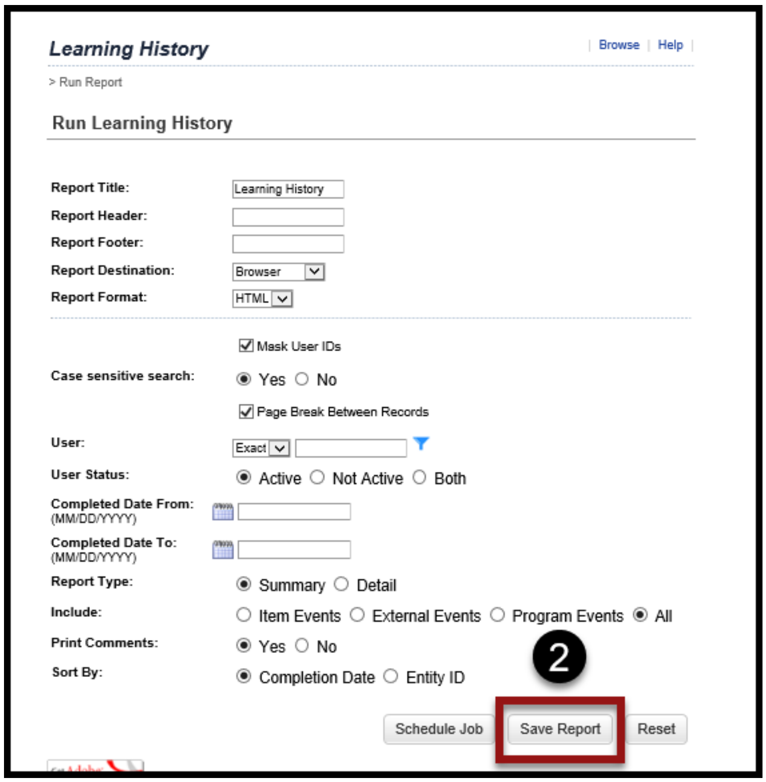
NOTE: You must select the Daily, Weekly, or Monthly radio button and enter the Time and Time Zone of the recurring schedule.

16. Enter a **Job Description** if necessary.
17. Select the **Notify via email upon completion** checkbox.
18. Enter the **Contact Email Address** to be notified that the report has been run.
19. Select the **Email the Report** checkbox if you want the report to be emailed to you.
20. Select **Finish.**

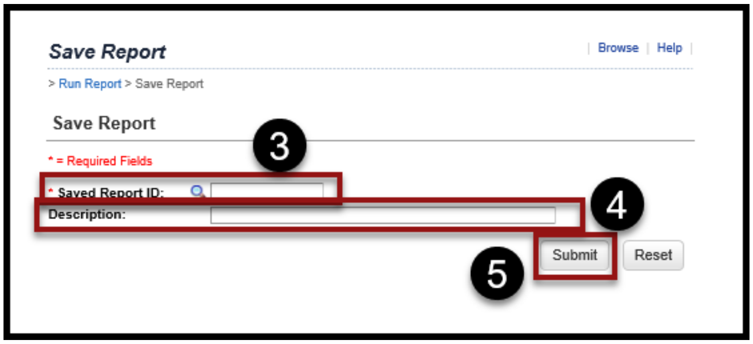


Task C. Save a Report

1. Complete Steps 1-11 in Task B to search for and run a report.
2. Select **Save Report**.



3. Enter a **Saved Report ID** or select the search icon to search and select a Report ID.
4. (Optional) Enter a **Description** of the saved report.
5. Select **Submit**.



6. The saved report displays in the **Saved Reports tab.**
7. Select the **Launch icon** to be taken to the Run Report screen and complete steps 4-20 from Task B.