

# TRS REPORTING GUIDE

## (COGNOS WEB PORTAL USER GUIDE)

Date	Version	Change Reference
04/29/2016	1.0	First Release
05/10/2016	1.1	Export and Report view features added

#### About this User Guide:

This document contains an introduction to the Cognos web portal and step-by-step instructions for logging into Cognos and navigating the TRS reports.

#### \*Browser Compatibility for viewing Cognos reports:

Cognos user's report viewing experience may differ based on the browser used by the user. Cognos Web portal is compatible to work on most of the Web browsers such as Chrome, Firefox, IE and Safari. Users may not be able to use full report features in Safari browser.

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## **Accessing Cognos Portal**

1) Link to Cognos portal (Production):

http://afs-bi.ucdavis.edu/

2) Accessing above mentioned link will take the user to below screen. Please use your current UCD login ID and Kerberos password to login.

		Help 😢
	Log on Please type your credentials for authentication. Namespace: AD3 User ID: UCD login ID and Kerberos password Password: OK Cancel	
IBM.	Licensed Materials - Property of IBM Corp. © Copyright IBM Corporation and other(s) 2005, 2014. IBM, the IBM logo, ibm.com and Cognos are trademarks or registered trademarks of Business Machines Corp., registered in many jurisdictions worldwide. Other product names might be trademarks of IBM or other companies.	f International and service

#### Accessing TRS Reports

3) After a successful logon, users will see below screen. Please make sure you select "Public Folders" if not already selected. Click "TRS" folder to access all TRS reports.

+ Sidev.ucdavis.edu/ibmcognos/cgi-b	pin/cognos.cgi?b_ac	tion=xts.run&m=portal/ 🎗 🗸 🖒	🖉 Public Folders - IBM Co	ogn ×
IBM Cognos Connection	Prabhdeep Singh	Log Off   💠	<b>.</b>	🛓 👻 Launch 👻 🕜 👻 📲
Public Folders My Folders				
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in "Public Folders"			Entries: 1	- 2 🔘   🗐
□   Name ◊		Mo	dified ¢	Actions
AFS Standard Templates		Aug	ust 19, 2015 3:51:43 PM	More
		Aug	ust 26, 2015 9:56:44 AM	More
Please dick "TRS" folder icon to select all the TRS reports				

4) Click "TRS MART (FM)".

<u>File Edit View History Bookmarks Tools Help</u>						⊐ x
🛞 UCD Directory 🛞 PPS DS \land PPS User Account M	Ia 核 DRS System 🛞	UCOP RACF Password 🛞	HRP Admin : Si	gn In <mark>SP</mark> Shar	ePoint	**
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TRS MART (FM)		January 29, 2016 12:	14:34 PM	More		
Click						

5) Select one of the published TRS reports.

IBM Cognos Connection	Prabhdeep Singh Log Off 🛛 💠 🗍	<b>.</b>
Public Folders My Folders		
Public Folders > TRS > TRS MART (FM)		🏥 🐺 🖆 🖶 🔛 🖋 (
		Entries:
Name A		Modified 0
TSCID01 - Employee Late Timesheet Submission		February 25, 2016 2:31:19 PM
TSCID02 - Supervisor Late Timesheet Approval		February 25, 2016 2:31:40 PM

## Sample Report

6) Example use of "TSCID01 - Employee Late Timesheet Submission" report

Default view of the report:

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A	AXFS											
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						.92						
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											Submit	

## **Report Prompts / Report Filters**

7) Users can run the report after selecting the "Report Prompts" also known as report filters. These report filters are optional. Please hit "Submit" after selecting the desired filters to see the report results.

IBM Cognos Viewer - TSCID01 - Employee Late Timesheet Submission v0.6	Prabh
	👺 Keep this version 🔻 📘
A&FS BI&ANALYTICS	
TSCID01 - Employee Late Timesheet Submi	All the filters are Optional
Dept: Period Date Range (Ton). Period Date Range (Ton):	
Div Title Dept Title Dept Cd Empl Id Empl Last Nm Empl First Nm Pay Period Start Dt Pa	riod End Dt Pay Schedule Desc Times Late Report Prompts
NO RECOLOS FOLINA.	Filter by "Employee Id"
	Period Date Range (Optional): Default: Last 90 Days From: Aug 14, 2015
	Filter by "Date Range" Pay Schedule (Optional):
	Filter by "Biweekly" or Monthly cycle monthly cycle monthly cycle Division Title (Ontional):
	Filter By "Division"
After Selecting the optional filters, always hit "Submit" to see the results.	Filter by       "Deptatrmen       t Title"       Submit

## Sample Report Results Using Filters

8) Report results after selecting the report filters and Submitting:

iv Title         Dept Title         Dept Cd         Empl Last Nm         Empl First Nm         Pay Period Start D         Pay Period End D         Pay Schedule Desc         Times Late           umpus anning health services         062100         056069180         yourn         mary         Jul 20, 2014         Aug 2, 2014         biweekly cycle         8           Nov 23, 2014         Dec 6, 2014         biweekly cycle         8         Empl Jan 18, 2015         Jan 31, 2015         biweekly cycle         8	Report Prompts
npus health services 062100 062100 056069180 your part of the par	oyee Id (Optional):
Initial services         Sep 14, 2014         Sep 27, 2014         biweekly cycle         8           Nov 23, 2014         Dec 6, 2014         biweekly cycle         8           Jan 18, 2015         Jan 31, 2015         biweekly cycle         8           Feb 1, 2015         Feb 14, 2015         biweekly cycle         8	oyee Id (Optional):
Nov 23, 2014         Dec 6, 2014         biweekly cycle         8           Jan 18, 2015         Jan 31, 2015         biweekly cycle         8           Feb 1, 2015         Feb 14, 2015         biweekly cycle         8	- / · · · · · · · · · · · · · · · ·
Jan 18, 2015         Jan 31, 2015         biweekly cycle         8           Feb 1, 2015         Feb 14, 2015         biweekly cycle         8	
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148199698 olowoyeye ibiyemi Aug 18, 2013 Aug 31, 2013 biweekly cycle 11	., 2015
Sep 15, 2013 Sep 28, 2013 biweekly cycle 11 To: Nov	12, 2015
Sep 29, 2013 Oct 12, 2013 biweekly cycle 11	
Oct 13, 2013 Oct 26, 2013 biweekly cycle 11 Pay S	chedule (Optional):
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Feb 16, 2014 Mar 1, 2014 biweekly cycle 11	y cycle
Apr 27, 2014 May 10, 2014 biweekly cycle 11	Deselect
May 25, 2014 Jun 7, 2014 biweekly cycle 11	ion Title (Ontional):
Jun 22, 2014 Jul 5, 2014 biweekly cycle 11	ion rue (optional).
Sep 28, 2014 Oct 11, 2014 biweekly cycle 11	nting
Jun 21, 2015 Jul 4, 2015 biweekly cycle 11	s planning
326772373 clift keavagh Dec 21, 2014 Jan 3, 2015 biweekly cycle 9	riculture
Dep	Select all Deselect all

### **Report Navigation**

9) The report generated may have multiple pages generated based on the user selected filter values. The report does not show the number of pages of data generated on the report interface. Page Down link will cause the next page to be shown in the viewing area of the report. Please use "Page up", "Page Down", "Top", "Bottom" links to navigate through different pages in the report. "Page up" and "Page Down" will take user one page up and one page down in the report respectively. "Top" will take user to first page of the report generated. "Down" will take user to end of the report result set.

Filters Selec	ted:		TSCID	03 - DTA La	ate Timesh	eet Submissior	1				
Division: Dept:				Period Date F Period Date	Range (From): Ja Range (To): Dec	in 1, 2015 : 1, 2015					
Div Title	Dept Title	Dept Cd	DTA Id	DTA Last Nm	DTA First Nm	Pay Period Start Dt	Pay Period End Dt	Pay Schedule Desc	No Of Times Late	Report Filters	
campus	occupational health	062100	388641292	zimmerman	lori	Jan 1, 2015	Jan 31, 2015	monthly cycle	3		
planning	services					Feb 1, 2015	Feb 28, 2015	monthly cycle	2	DTA Id (Optional):	
			641014204	barba	leticia	Jul 5, 2015	Jul 18, 2015	biweekly cycle	1		
			712551233	means	brenda	Feb 1, 2015	Feb 28, 2015	monthly cycle	1		
						Mar 1, 2015	Mar 31, 2015	monthly cycle	6	Period Date Range (Ontional)	۱ <b>.</b>
						Apr 1, 2015	Apr 30, 2015	monthly cycle	7	Default: Last 00 Dava	
Filters Selected: Divaion: Dept: Div Title De campus occupation planning vc plannin vc plannin vp - agriculture 4 h found Top ☆ Page up ♥ Page i						May 1, 2015	May 31, 2015	monthly cycle	6	Delauli. Lasi 50 Days	
v						Jun 1, 2015	Jun 30, 2015	monthly cycle	6	From:	1
	vc planning, fac & safety	062101	580662161	ricks	lois	Jan 1, 2015	Jan 31, 2015	monthly cycle	3	Jan 1, 2015	•
						Feb 1, 2015	Feb 28, 2015	monthly cycle	2	To:	
			_			Mar 1, 2015	Mar 31, 2015	monthly cycle	3	Dec 1, 2015	<b>.</b>
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			798634366	gracia	vicki	Jul 1, 2015	Jul 31, 2015	monthly cycle	6	monthly cycle	
vp - agriculture	4 h foundation	062098	183216225	pohl	ann	Jan 1, 2015	Jan 31, 2015	monthly cycle	2	<u>D</u>	eselect
						Feb 1, 2015	Feb 28, 2015	monthly cycle	1	Division Title (Optional):	
						Mar 1, 2015	Mar 31, 2015	monthly cycle	1		_
						Apr 1, 2015	Apr 30, 2015	monthly cycle	1	accounting	<b>^</b>
						May 1, 2015	May 31, 2015	monthly cycle	2	Campus planning	
Tan A Darry	n 🗶 Daga dawa 🗶 Detter									vp - agriculture	-
⇒ rop ∧ rage u	ip 🔻 Fage down 🛥 Botton										

#### **Exporting Report to Excel, PDF and Other File Formats**

- 10) Reports can also be viewed to PDF, Excel, CSV files. When you run a report in a format such as delimited text (CSV), Microsoft Excel spreadsheet software format (XLS), the IBM Cognos report name is used as the exported file name.
- View in Excel 2007 data: This format is a simple table view that is best for working with your data in Excel after you've downloaded it. It will download an .xlsx file.
- View in Excel 2007 format: This is a formatted view of your data that mimics the look of the Cognos report. It will download an .xlsx file.
- View in Excel 2002 format: If you have Excel 2007 or later, we do not recommend using this format at this time.
- View in CSV format: This is a simple table that is in comma separated values format, which is easily read by other programs. It will be saved with a .xls extension, and by default, it will be opened in Excel.
- View in PDF format enables the users to generate the report output in PDF format. To view the PDF generated report, users should have Adobe PDF readers installed on their computers.
- By default when you run a report, report will be displayed in HTML format. To view report in PDF please click "View in PDF Format" as shown in below screenshot 1. You can Download the PDF version of the report from a PDF download button as shown in Screenshot 2 To go back to the HTML version of the report please click/select "View in HTML Format"
- Please contact your departments System Administrators to install MS Excel or Adobe PDF readers on your machines if not already installed.

#### Screenshot 1 – View in different formats

IBM Co	ognos View	/er - TSC	CID01 - Er	nployee Late		Prabhdeep	Singh <u>Loq</u>	<u>off</u>	â <b>6</b>	<u>About</u>	IBM.										
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Div Title	Dept Title	Dept Cd	Empl Id	Empl Last Nm	Empl First Nm	Pay Period Start Dt	Pay Period End Dt	Pay Schedule Des	e Times Late Rep		Report f	rt Prompta									
campus	occupational	062100	056069180	youm	mary	Jul 20, 2014	Aug 2, 2014	biweekly cycle	8												
planning	health services												Sep 14, 2014	Sep 27, 2014	biweekly cycle	8	En	nployee Id	e Id (Optional):		
						Nov 23, 2014	Dec 6, 2014	biweekly cycle	8												
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						Sep 15, 2013	Sep 28, 2013	biweekly cycle	11	To: No	ov 12, 20	15	Į	-							
						Sep 29, 2013	Oct 12, 2013	biweekly cycle	11	_											

#### Screenshot 2 – PDF download

IBM	Cognos	Viewer - 1	SCID01 - Emplo	oyee Lat	te Timesheet	Submission				Cognos Acc	ount Log Off	🟠 🤸	<u>About</u>	IBM.
									🖹 Keep this ve	ersion 🔻 🕨 🕅	ta ta 🖪 🕶 🛛	- 1	🚰 Add th	is report 🔻
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		A BI&AI									Click he	re to dow PDF	mload	
	TSCID01 - Employee Late Timesheet Submission May 10, 2016 Filters Selected: Division: Period Date Range (From): Dept. Period Date Range (Form):													
													13	
		Agriculture	Ag & Resource	030010	Aderonmu	Oluwafunmike	934635400	3	Biweekly Cycle	Feb 14, 2016	Feb 27, 2016	Prompts		
			Economics							Mar 13, 2016	Mar 26, 2016	Employee Id		

#### **Create a Dynamic Report View**

11) A "report view" is a copy of a report that is stored in your personal folders. A production report can be copied into a report view in a personal folder.

Please follow below screenshots for directions to create, save and access saved Report views.

IBM Cognos Connection	Cognos Account Log Off 🔗		• 1	- 0 -	IBM.
Public Folders My Folders					
Public Folders > TRS > <b>TRS MART (FM)</b>		j 📰 🔛 😭 📽 🔇	🖬 🚽		
		Button	o create re	eport view	
Name ¢		Modified <sup>¢</sup>	Actio		
TSCID01 - Employee Late Timeshee	t Submission	May 5, 2016 4:54:04 PM		More	
TSCID02 - Supervisor Late Timesher	et Approval	February 25, 2016 2:30:01 PM		D	port view of this re
TSCID03 - DTA Late Timesheet Sub	mission	February 25, 2016 2:30:20 PM		More	port view of this re

	Name:		
	Report View of TSCID01 - Employee Late	Timesheet Submission	
	Description:		
	Report view	Mention Report View name and Description	
	Screen tip:	Select the location to save Report view and click Finish	)
	Location: None Select another location Select My Folders		
	Cancel < Back Next >	Finish	
RM Cogpor Coppor	Cancel < Back Next >	Finish	
BM Cognos Connec	Cancel < Back Next >	Finish	
BM Cognos Connec	Cancel < Back Next > tion My Folders	Finish	
BM Cognos Connec Public Folders	Cancel < Back Next > tion My Folders MART (FM)	Finish ↓ Click "My Folders" to access saved Report view.	
BM Cognos Connec Public Folders lic Folders > TRS > TRS I Name \$	Cancel < Back Next > tion My Folders MART (FM)	Finish ↓ Click "My Folders" to access saved Report view.	
BM Cognos Connec Public Folders lic Folders > TRS > TRS I Name TSCID01 - Emplo	Cancel < Back Next > tion My Folders MART (FM) oyee Late Timesheet Submission	Finish ↓ Click "My Folders" to access saved Report view.	
BM Cognos Connec Public Folders ic Folders > TRS > TRS I Name TSCID01 - Emplo TSCID02 - Super	Cancel < Back Next > tion My Folders MART (FM)  byee Late Timesheet Submission rvisor Late Timesheet Approval	Finish ↓ Click "My Folders" to access saved Report view.	

↓

After accessing this report view in "My Folders", users can still filter through "Report Prompts"

IBM Co	ognos Conne	ection			
D Pul	blic Folders	My Folders			
My Folders	5			Saved Reportview	
	Name ¢				
•	Report View o Report view	f TSCID01 - Employe	ee Late Timesheet Submissior	1	

#### **Create a Static Report View**

12) You can also open the report, select the "Report prompts", "Submit" the report and "Save as Report View" from the report page result page itself. This shall save the report view with selected Report prompts and save it to your specified folder. So every time you run this report from the saved report view, reports shall always display with preselected/saved prompts.

IBM Co	gnos Viewer - 1	rscid01 -	Employee La	ate Timeshee	t Submiss	ion					
A BL&A										È Keep this vi ⊠ Email Repo R Save as Re	ersion ▼ rt port Vie
Filters Se Division: Dept:	lected:	Perio	TSCID01 - d Date Range (Fro d Date Range (To)	- Employee m): Oct 1, 2015 :: May 10, 2016	Late Tim	lesheet S	ubmission	Save a sel	s Report view with p ect Report prompts		
Div Title	Dept Title	Dept Cd	Empl Last Nm	Empl First Nm	Empl Id	Times Late	Pay Schedule Desc	Pay Period Start Dt	Pay Period End Dt	Report Prompts	
Agriculture	Ag & Resource	030010	Aderonmu	Oluwafunmike	934635400	1	Biweekly Cycle	Feb 14, 2016	Feb 27, 2016		
	Economics		Anderson	Nina	414797282	11	Biweekly Cycle	Sep 27, 2015	Oct 10, 2015	Employee Id (Optional):	
								Oct 11, 2015	Oct 24, 2015		٦   r
								Oct 25, 2015	Nov 7, 2015		-
								Nov 8, 2015	Nov 21, 2015	Period Date Range (Optional):	
								Nov 22, 2015	Dec 5, 2015	Default: Leat 00 Dava	
								Dec 6, 2015	Dec 19, 2015	Delauli. Last 50 Days	
								Dec 20, 2015	Jan 2, 2016	From:	-
								Jan 3, 2016	Jan 16, 2016	Oct 1, 2015	₩ *
								Jan 17, 2016	Jan 30, 2016	Te	

In Static report view users can only view static data in the report view saved earlier and report cannot be filtered further through "Report Prompts" as shown below. Also this view cannot be viewed in PDF or excel and is only viewable in HTML.

BI&A										
Filters Se Division: Dept:	lected:	Period Period	TSCID01 - E Date Range (From Date Range (To): I	mployee La ): Oct 1, 2015 May 10, 2016	te Times	heet Subr	nission		Static Filters. filtere	Cannot be
Div Title	Dept Title	Dept Cd	Empl Last Nm	Empl First Nm	Empl Id	Times Late	Pay Schedule Desc	Pay Period Start Dt	Pay Period End Dt	Report Prompts
Agriculture	Ag & Resource	030010	Aderonmu	Oluwafunmike	934635400	3	Biweekly Cycle	Feb 14, 2016	Feb 27, 2016	
	Economics							Mar 13, 2016	Mar 26, 2016	Employee Id (Optional):
								Apr 10, 2016	Apr 23, 2016	
			Anderson	Nina	414797282	14	Biweekly Cycle	Sep 27, 2015	Oct 10, 2015	Period Date Pange (Optionally
								Oct 11, 2015 🔒	Oct 24, 2015	renou bate kange (optional).
								Oct 25, 2015	Nov 7, 2015	Default: Last 90 Days
								Nov 8, 2015	Nov 21, 2015	From:
								Nov 22, 2015	Dec 5, 2015	To:
								Dec 6, 2015	Dec 19, 2015	Pay Schedule (Ontional):
								Dec 20, 2015	Jan 2, 2016	Fay schedule (optional).
								Jan 3, 2016	Jan 16, 2016	
								Jan 17, 2016	Jan 30, 2016	Division Title (Optional):
								Jan 31, 2016	Feb 13, 2016	
								Feb 14, 2016	Feb 27, 2016	Dept Title (Optional):
								Feb 28, 2016	Mar 12, 2016	copi nue (optionul)
								Mar 13, 2016	Mar 26, 2016	

#### **Error Messages**

13) If user gets the message "No Records Found", it could either be that there are no records present in the database matching the Filter criteria or the date range selected is outside the "Data retention criteria" for the application.

IBM Cognos Viewer - TS	CID01 - Employee L	ate Timeshee	et Submission v0	).6			Prabhdeep S	ingh <u>Loq (</u>
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A FS BI&ANALYTICS								
Filters Selected: Division: accounting, campus planni Dept: 4 h foundation, acctg - cornwe general acctg, acctg - payroll, acctg	TSCID01 - Emp	loyee Late Per ers, acctg - occupational Per	Timesheet Sub iod Date Range (From iod Date Range (To): 1	mission I): Sep 1, 2015 Nov 12, 2015				
health services, payroll special hand	lling, vc planning, fac & safe	ety						
Div Title Dept Title Dept Cd	Empl Id Empl Last Nm	Empl First Nm	Pay Period Start Dt	Pay Period End Dt	Pay Schedule Desc	Times Late	Report Prompts	
No Records Found.							Employee Id (Optional):	
	No data selectir	found in the re ig desirable opti Submit	port after ons and				Period Date Range (Optional): Default: Last 90 Days	

14) To return to report list, please hit the back button shown in below screenshot:

+ Attp://afs-bidev.ucdavis.	udu/ibmcognos/cgi-bin/cognos.c	gi?b_action=cognos\	/iewer&ui.action=ru	n&ui.object 🔎 👻 🖒	SCID01	1 - Employee Late T ×	<u>ଲି</u> ବ
BM Cognos Viewer - TSCID01	- Employee Late Timeshee	et Submission v0	.6			Prabhdeep Singh Log Off	About IEI
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A&FS BI&ANALYTICS					Users a by clic	ccess other reports sking on this Link	
TSCID0	1 - Employee Late Time	sheet Submiss	sion				Nov 12, 20
vision:	Period Da Period Da	te Range (From): te Range (To):					
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iv Title Dept Title Dept Cd Empl Id	Empl Last Nm Empl First Nm	Pay Period Start Dt	Pay Period End Dt	Pay Schedule Desc	Times Late	Report Prompts	
o Records Found.						Employee Id (Optional):	

#### **Clearing Browser History**

15) How to Clear History for Different Browsers:

If Users see bellow error message while trying to login please clear your browser history and then try logging in again.

🏶 TRS Home 🕙 UCD Directory 🔒 UCI - UCPath Ы UCD - TRS Ы KFS 🛞 SR	📿 HipChat
IBM Cognos Software	
DPR-ERR-2107	
The User Capabilities Cache cookie cannot be decoded.	
Details <b>∀</b>	
	ß
ОК	

#### Clear History for Firefox browser



#### For Google Chrome:

_			-		- 0	X
						☆
			New tab			Ctrl+T
			New window	/	(	Ctrl+N
			New incogni	to window	Ctrl+S	hift+N
	History	Ctrl+H	History			
	Recently closed	13	Downloads			Ctrl+J
\$	Settings	Ctrl+Shift+T	Bookmarks			
	No tabs from other devices		Zoom	- 100%	6 +	53
_			Print			Ctrl+P
			Find			Ctrl+F
			More tools			

For Internet Explorer:



eneral	security	Privacy	Content	Connections	Programs	Advanced
Home pa	sge					
-	To crea	ate home	page tabs,	type each add	dress on its o	wn line.
	http:	//account	ting.ucdav	is.edu/		~
						4
						1073
		Use cu	rrent	Use default	Use n	ew tab
Startup	-	5-5- 	1000		94/90	
) St	art with ta	abs from th	he last ses	sion		
) St	art with ta art with h	abs from the ome page	he last ses	sion		
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### **Report Tips**

- All report prompts/filters are optional. If no search criteria is entered before clicking the Submit button, the default settings will return all late time submissions or late approval results for the past two fiscal years to current.
- The message "No Records Found", indicates there are no records present in the database matching the Filter criteria or the date range selected is outside the "Data retention criteria" for the application.
- If the word "Default" appears within the supervisor name columns of the Supervisor Late Approvals report, this generally indicates the supervisor is not an active employee in the Payroll/Personnel System (PPS), but rather is a UC Davis Temporary Affiliate (TAF).
- The search results may generate from one to multiple pages based on the search criteria selected. Use "Page up", "Page Down", "Top", "Bottom" links to navigate through different pages in the report. The "Page up/Page down" buttons are located in the lower left corner of the results page.
- "Email Report" feature is currently not open on the Cognos report.
- Have questions or need help with the use of these reports? Feel free to contact the TRS Help Desk at trshelp@ucdavis.edu.