Creating a Favorite Report

The following instructions outline the process for creating a favorite, including setting the parameters, saving, and accessing saved favorites. For ease of use and accessibility you should create two “Favorites”, one for each Pay Cycle. Running the report from Favorites will automatically pull the correct parameters without having to configure the applicable selections every time.

1. Set Report as Favorite

1.1 Select the UCSB Payroll Export Register report from the “Other Reports” section of the list.

1.2 Select applicable parameters:

  1.2.1 **People**: Select All Home and Transferred-in

     Note: We recommend running the report with the All Home and Transferred-in filter in order to capture all of your employees. Favorites for other filters (All BW, All MO, etc.) can be created, but may not include the shared employees (transferred-in).

  1.2.2 **Time Period**: Select Previous Pay Period

  1.2.3 **PayCycle**: choose applicable Pay Cycle

  1.2.4 **Output Format**: Change to Microsoft Excel .xls

1.3 Click the **Create Favorite** button on at the top right of the list.

1.3.1 In the “Favorite Report” window add the Report title to the first box.

     Note: suggested format is *UCSB Payroll Export Register-MO* and *UCSB Payroll Export Register-BW*.

1.3.2 Author’s Remarks: Add any notes about the report (optional).

1.3.3 Click the **Save Favorite** button.

1.4 To create a favorite for the second report you can repeat the steps above or you can select the **Duplicate Favorite** button to make a copy of the favorite. You can then change the Pay Cycle and rename the report with the applicable Pay Cycle in the title.

1.5 Once saved, your Favorites will populate at the top of your reports list in their own Favorites section.
1.6 Errors that may occur:

1.6.1 Departments with large employee lists (greater than 250) may see the following error when setting up their Favorites:

Too many employees have been selected in the "previously selected employee(s)" list. Please reduce the number of employees selected prior to navigating to reports.

1.6.2 The message is enforcing best practices for running reports from Genies. This message will persist when defining the Favorites, but will not impact results.

1.7 Workaround to eliminate the message:

1.7.1 Display a list of employees in Pay Period Close.

1.7.2 Highlight a single employee and click on the ‘Reports’ editor link at the top of the list.

1.7.3 Proceed with report selection, criteria selection (including the change for the People to display), and create the Favorites for each payroll cycle.

1.7.4 Once saved, your Favorites will populate at the top of your reports list in their own Favorites section.