**Run the Initialization Report**

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| Step | Action |
| Navigation: Main Menu > Workforce Administration > UW External Systems > Compensation Administration Tool > CAT Processes > Initialization Report Process |
| 1 | Click the **Add a New Value** tab to create a new Run Control ID. |
| 2 | Enter a **Run Control ID**. This can be any unique identifier (ex. your initials and the date). |
| 3 | Click the **Add** button. This will take you to the Initialization Report run control page. |
| 4 | Enter the **Effective Date** as the first day of the upcoming fiscal year (such as 07/01/2016). |
| 5 | Select the desired information for the **Business Unit**, **Division**, and **Department** fields. |
| 6 | Click the **Select Values** button employee class box. On the Employee Class selection page, click the **Clear** button and select the desired information for the **Empl Class checkboxes**. |
| 7 | Click the **OK** button to return to the Initialization Report run control page. |
| 8 | Click the **Run** button. This will take you to the Process Scheduler Request page. Click the **OK** button. |
| 9 | On the Initialization Report run control page, note the **Process Instance number** under the Process Instance link. |
| 10 | Click the **Process Monitor** link. This will take you to the Process Monitor page. |
| 11 | Click the **Refresh** button intermittently until the Run Status is Success, and the Distribution Status is Posted. |
| 12 | Click the **Details** link next to the UW\_CAT\_IR process just run. This will take you to the Process Details page. |
| 13 | Click the **View Log/Trace** link. This will take you to the View Log/Trace page. |
| 14 | Click the file named “**init\_report\_ProcessMonitor#.xls**”. The “ProcessMonitor#” will be the seven digit code associated with the Initialization Report process just processed. |
| 15 | Click **Open** to open the .xls file. If the file does not automatically open, you may need to bring up Excel and select **Yes** in the pop-up window. This file contains all employees, in the selected business unit and employee classes with less than 5 funding splits. **Save** the Initialization Report as a (.xls) file. |
| 16 | Return to the View Log/Trace page if employees with more than five funding splits exist within the Tester's Business Unit. Click the file named “**init\_report\_addtlsplits\_ProcessMonitor#.xls**” if it exists and is listed following the previous file. Please note that the file will not exist if employees with more than five funding splits do not exist within the Tester's Business Unit. |
| 17 | Click **Open** to open the .xls file. If the file does not automatically open, you may need to bring up Excel and select **Yes** in the pop-up window. This file contains all employees with greater than 5 funding splits, should employees such as this exist given the run control criteria. **Save** the Initialization Report. |