



TCP Report Guide

Table of Contents

Reports.....	1
Running a Report.....	1
Creating a Saved Report.....	6
Scheduling Report Automation.....	8
Download and Export Employee Hours.....	15
How to Open “OpenXML” Report in Excel.....	16

Reports

Running reports will allow you to review information regarding your employees' hours, accruals, and more in a variety of formats. These reports can be downloaded, automatically sent via email, or sent directly to your printer.

Period Reports provide information related to:

- Payroll
- Positions
- Schedule Variances
- Period Reports (including attendance policy reports)
- Accruals

Add list of common reports that front office will use (MGR/TMKPR)

Running a Report

1. Click on Reports, then select Period Reports.

The screenshot displays the 'Period Reports' page in a web application. On the left is a dark blue sidebar with navigation options: Search, My Dashboard, Hours, Schedules, Employee, Reports (highlighted), Period Reports (highlighted), Scheduler Reports, Tools, Configuration, and Company. The main content area has a header with 'Period Reports' and a star icon, along with 'Options', '?', and 'Feedback' buttons. Below the header are filter buttons for 'Sort Key Settings', 'Employee Filter', 'Position Filter', and 'Cost Code Filter'. The main content is divided into three sections: 'Categories' (listing Payroll, Position, Scheduler, Period, Cost Code, Accruals, Miscellaneous, FMLA), 'Select a report' (listing Employee Positions, Position Analysis Detail, Position Analysis Summary, Position Group Detail, Position Group Summary, Position Overtime, Position Split, Selected Position), and a right-hand panel with buttons for 'Download', 'Settings', 'Preview', 'Print', and 'Create Saved Report'.

2. Select one of the report categories.

3. Select the report you'd like to run.

The screenshot shows the 'Period Reports' interface. At the top, there are buttons for 'Options', '?', and 'Feedback'. Below that are filter buttons for 'Sort Key Settings', 'Employee Filter', 'Position Filter', and 'Cost Code Filter'. The main content area is divided into three sections: 'Categories', 'Select a report', and a right-hand sidebar. In the 'Categories' section, 'Position' is highlighted with a red box. In the 'Select a report' section, 'Employee Positions' is highlighted with a red box. The sidebar contains buttons for 'Download', 'Settings', 'Preview', 'Print', and a green 'Create Saved Report' button.

Note: Any customized reports will have an * after the report name.

4. Some reports will allow for date entry. If applicable, enter in the date range for the report or select a pre-defined date range from the drop-down.

This screenshot is similar to the previous one but highlights the date selection area. A red box surrounds the date range '1/2/2023 to 1/30/2023' and the 'Manual' dropdown menu. Below the date range are labels for 'Start date', 'Stop date', and 'Period'. The rest of the interface, including the 'Select a report' section and the sidebar, remains the same as in the previous screenshot.

Note: If running a report that contains hours, run the report through yesterday. If the report is run through the current date, any employee who is currently clocked-in will be flagged as an exception as TCP will see today's time segment as an incomplete segment.

5. By default, the report that you run will include all employees. To limit which individuals will appear on the report, set an Employee or Position Filter using the Employee Filter or Position Filter buttons. Cost Codes are not used by UTA.
 - a. The most used Employee Filters include:
 - i. Employee Status
 - ii. Employee ID - can select multiple
 - iii. Position - can select multiple
 - iv. Department - can select multiple
 - v. Employee Role – employee’s position classification (i.e. A&P, Student Worker, Classified Non-Exempt, etc.)

The Employee Filter screen will show the number of employees who fit the filter. You can also preview the report results using the Preview button.

The screenshot displays the 'Employee Filter' window. On the left, a list of filter categories includes 'Employee Status' (checked), 'Employee ID', 'Position', 'Classification', 'Department' (checked), 'Location', 'Employee Role', 'Schedule Group', 'Manager', 'Job Classes', 'Provision', 'Qualifications', 'Hire Date', 'Days Employed', and 'Custom Fields'. On the right, a list of exclusion options includes 'Exclude suspended' (checked), 'Exclude terminated' (checked), 'Exclude salaried', 'Exclude full time', 'Exclude part time', and 'Exclude employees with no work status'. At the top right, there are buttons for '?', 'Feedback', 'Preview', 'Load', 'Save as', and 'Reset All'. At the bottom, a summary bar shows '12 of 10230 employees match' with a refresh icon, and 'Cancel' and 'Filter' buttons.

- b. For Position Filters, click the Enable Selection box.
 - i. Click the “User accessible only” box to show only the positions accessible to your permissions.
 - ii. Chose to Include Selection or Exclude Selection
 - iii. Select or search for the position(s) to include or exclude.
- c. Click Filter to apply the filter

Filter Position ?

Include All
 User accessible only

Select from list

Leave
 Active only

<input type="checkbox"/>	1001	ASSOCIATE DIRECTOR
<input type="checkbox"/>	1001	Administrative Assistant II
<input type="checkbox"/>	1001	ASSISTANT DIRECTOR*
<input type="checkbox"/>	1001	ASSISTANT DIRECTOR*
<input type="checkbox"/>	1001	Administrative Assistant I
<input type="checkbox"/>	1001	ASSISTANT DIRECTOR*

- d. Report filters can be saved to be used in the future by using the Save As button. Once a filter is saved, it can be accessed using the Load button.
 - e. Filters will be saved while you remain on the Period Reports page. Once you navigate away from the page, they will go back to the default settings.
6. How the report will be sorted can be modified using the Sort Key Settings button. The current sort key settings will be displayed and can be removed using the Unassign icon, and the sort direction can be changed using the slider. Add new sort keys using the Assign button.

Note: *The Sort Key setting changes will remain until you change them.*

Sort Keys
? Feedback

+ Assign

🔍

Showing 3 records of 3

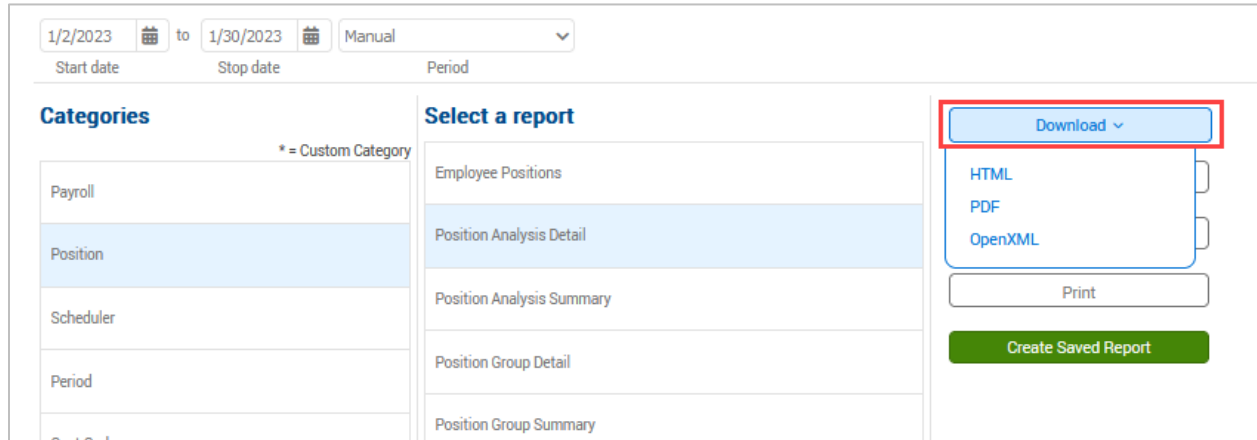
	Unassign	Order	Description	Sort Direction
	⊖	^ v	<u>1</u> Last Name	<input type="radio"/> ASC
	⊖	^ v	<u>2</u> Classification	<input type="radio"/> ASC
	⊖	^ v	<u>3</u> Manager	<input checked="" type="radio"/> DESC

Cancel
Save

7. The Settings button will display report specific settings that can be adjusted. These settings will vary per report depending on the data in the report.

Note: *The Settings set for a particular report will save until you change them.*

8. You can preview the report prior to downloading it using the Preview button. This will display the report on-screen.
9. Click on the Download button to choose which output format you would like to download:
 - f. HTML: The output is produced in a .html file that can be opened by a web browser.
 - g. PDF: The output is produced in a .pdf file that can be opened in Adobe Reader or another program designed to read .pdf files. As the .pdf report is more difficult to edit than the other formats, many companies use this for producing reports to send out.
 - h. OpenXML: The report is produced in a .xml file that can be opened in Microsoft Excel or OpenOffice.

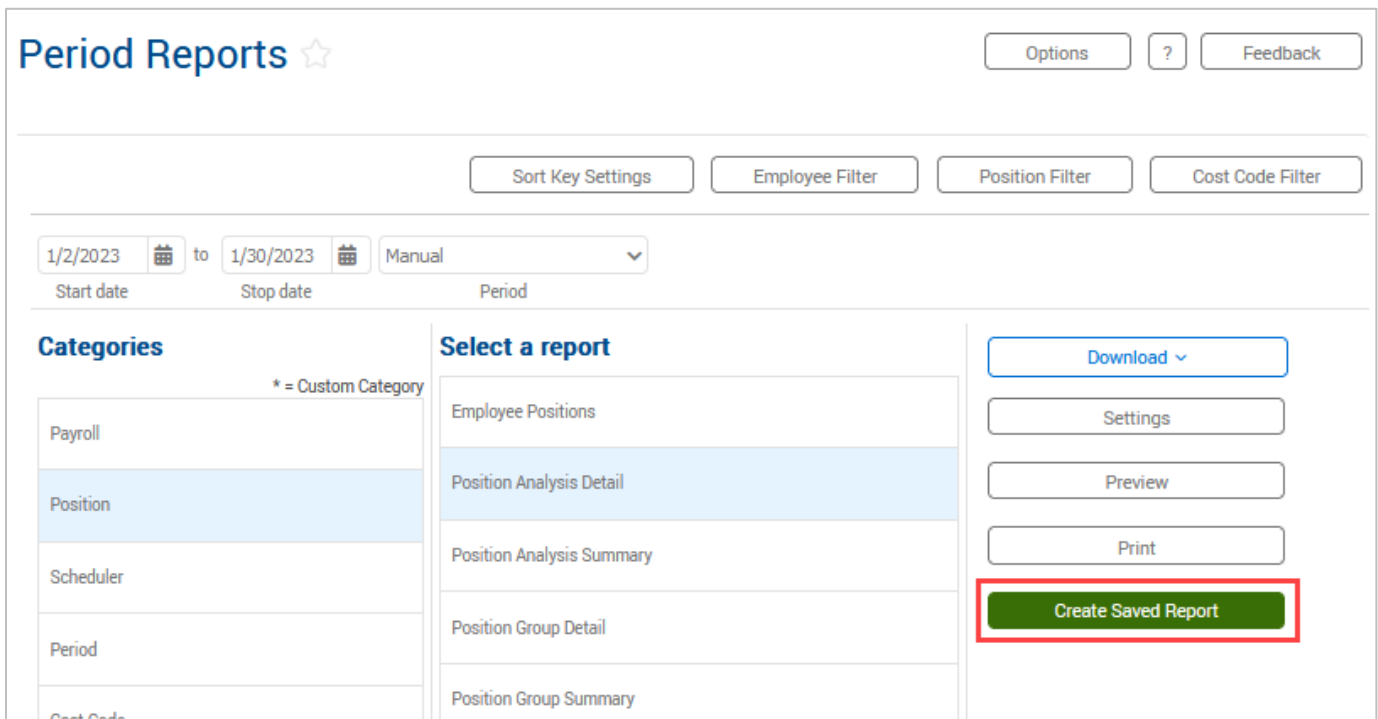


10. Alternately, click Print to send the report directly to your printer for physical copies.

Creating a Saved Report

Creating a Saved Report will allow you to save any filters or settings to a report's defaults, allowing you to run the report without having to set up configurations each time.

1. In the Period Reports window, select the report you want to start with.
2. Click the green Create Saved Report button.



3. Click the Category drop-down to choose an existing report category or create a new category by typing it into the box. This represents the section that the report will be filed under when viewing your saved reports.
4. Enter a title for the report in the Report title field.
5. To choose specific employees to include in the report, check the box for Save employee filter, click Employee Filter, and set the filtering criteria.
6. To choose specific positions to include in the report, check the box for Save position filter, click Position Filter and set the filtering criteria.

Note: *Cost Codes are not used by UTA.*

7. If the chosen report has report-specific settings, click on the Settings button at the bottom of the window. These settings will automatically be saved when the report is saved.
8. Click Save.

Saved Report
?

Base report name **Position Analysis Detail**

Category ▼

Report title

Jane Custom Report

Monthly Position Review

^ Filters

Save options Options

Save employee filter Employee Filter

Save position filter Position Filter

Save Sort Key Settings Sort Key Settings

Save cost code filter Cost Code Filter

∨ Report Automation

Settings
Cancel
Save

9. The report will now display in your Reports page under the indicated category. The * indicates it is a Saved report. This new report can be run using the Download button.
10. To modify the Saved report, click the "Edit" button under Manage Saved Report.

Categories	Select a report	
* = Custom Category	* = Custom Report	
Payroll	Monthly Position Review *	Download ▾
Position		Settings
Scheduler		Preview
Period		Print
Accruals		Create Saved Report
Miscellaneous		Manage Saved Report
Human Resources		Delete
TimeKeeper/Manager		Edit
Leave Management		Edit the saved reports custom settings and automation
Payroll Reports		
Jane Custom Report *		

Scheduling Report Automation

TCP Report Automation schedules a report to be run and sent to an employee or selected group of employees. This step can be used for any Custom report, as indicated with an *, that you have created.

Note: *You cannot schedule automation on a public custom report – you must have created your own report to schedule automation.*

1. Click Reports, then Period Reports
2. Click the needed Category, then on the name of the report being scheduled.

Note: *The dates and filters do not need to be set on the Period Reports screen – they are set on the custom report.*

3. Click the Edit button.

Period Reports ☆ ? Options ?

Sort Key Settings
Employee Filter
Position Filter
Cost Code Filter

1/13/2023 to 3/14/2023 Last 60 Days

Start date Stop date Period

Categories	Select a report	Actions
Payroll	Conflicting Segments *	Download ▾
Position	DEPT Accrual Usage *	Settings
Scheduler	Employee Absence Requests *	Preview
Period	Employee Comp Time Hours *	Print
Accruals	Employee Comp Time Hours List *	Create Saved Report
Miscellaneous	Employee Information *	Manage Saved Report
Human Resources	Employee Late Early In Out *	Delete
TimeKeeper/Manager	Employee Missed Punch Report *	Edit
Leave Management	Missing Employee Approvals *	Edit the saved reports custom settings and automation
Payroll Reports	Missing Manager Approvals *	

Note: It will take a moment for the report information to populate.

- Expand the section for Report Automation.

Saved Report [?]

Base report name **Accrual Usage**

Category TimeKeeper/Manager

Report title DEPT Accrual Usage

Filters

- Make report visible to all users
- Save options **Options**
- Save employee filter **Employee Filter**
- Save position filter **Position Filter**
- Save Sort Key Settings **Sort Key Settings**
- Save cost code filter **Cost Code Filter**

Report Automation

Settings Cancel Save

5. Click the +Add button.

Saved Report [?]

Base report name **Accrual Usage**

Category TimeKeeper/Manager

Report title DEPT Accrual Usage

Filters

- Make report visible to all users
- Save options **Options**
- Save employee filter **Employee Filter**
- Save position filter **Position Filter**
- Save Sort Key Settings **Sort Key Settings**
- Save cost code filter **Cost Code Filter**

Report Automation

+ Add

Showing 0 records of 0

Settings Cancel Save

6. Enter a description for the report automation.

7. Select the Reporting Period.

Report Automation ?

General

Description Active

Created by JDOLAN

User to run automation Run as multiple users

Send report(s) from a specific email address

Send as name

Email address

Reporting period ?

Period

Period start offset days

Period stop offset days

[Cancel](#) [Next](#)

- a. The default Reporting Period is “Floating Period”. This allows the dates of the reported data to be adjusted according to the time period selected.
 - i. Also select the “Period” – this indicates which dates will be included. Note that the first open date is displayed in the center of the top TCP header.

| TimeClock Plus®

 Company: University Of Texas Arlington
 Week: 1/2/2023

Period Reports ☆

 ? ?

- b. The Reporting Period of “Fixed Period” allows the entry of specific report dates.
- c. The Reporting Periods of “Selected date to today” and “Selected date to yesterday” allows you to indicate the start date for the report.

Note: For several reports, data will not return if the employee is currently clocked in. For these reports, use the “Selected date to yesterday” option.

8. Click the Next button.

9. On the Output Options screen, indicate the desired report format. PDF or OpenXML are recommended.
10. If desired, check the Notification Setting for “Generate notification even when no data is found”.
11. Click the Next button.

Report Automation [?]

Output Options

Generate a single report that contains all employee information
 Generate a personalized report for each employee

Report Format

PDF
 HTML
 OpenXML

Notification Settings

Generate notification even when no data is found [?]
 Create exception log with export [?]

Back Cancel Finish Next

12. On the next screen, enter the email address(es) of the employees to whom the report should be sent. Enter the email address then click the Add button.

Email addresses that have been added will be displayed in the table.

Report Automation [?]

Message Recipients

Add Add as SMS address

Delete	Address Type	Recipient
<input type="checkbox"/>	Email	trinity.woolf@uta.edu
<input type="checkbox"/>	Email	blaze.nedderman@uta.edu

Include the user that runs automation in email recipient list

Back Cancel Finish Next

- In the Email body box, enter the email message to be sent with the report. Once the message is entered, click the Next button.

Report Automation

Email Content

Email body

The monthly accrual usage report is attached. |

SMS body

Back Cancel Finish Next

- In the Task Scheduling box, you will see the occurrences when the report was generated. Click the Edit (pencil) button.

Report Automation

Task Scheduling

+ Add

Showing 1 records of 1

Edit	Description
	Daily on All at 03:11 PM from 03/15/2023

Back Cancel Finish

- On the Schedule Task Rule box, select how frequently the report should be run using the Execute selection. Enter the date and time that the report should be run and the email sent. This date and time should be at least five minutes after the current time. Click Save to save the frequency, date, and time.

Schedule Task Rule

Execute Every X Days

7 days at 03:30 PM

from 3/15/2023 to 3/16/2023

Cancel Save

16. Click Finish to finish setting up the Report Automation.
17. The new or updated Report Automation will display on the Saved Report page. Click Save to save the updated Report Automation information.

Saved Report ?

Save options Options

Save employee filter Employee Filter

Save position filter Position Filter

Save Sort Key Settings Sort Key Settings

Save cost code filter Cost Code Filter

↑
↓

Report Automation

+ Add

Showing 1 records of 1

		Description	Created By	User To Run Automation
		monthly accrual usage	1000039016	1000039016

Settings
Cancel
Save

The communication with the attached report will send to the selected employees on the indicated date and time.

Accrual Usage

TA

TCP Automatic Notifications

To ✔ Woolf, Trinity ✔ Nedderman, Blaze

↶
↷
→
📧
⋮

3:30 PM

DEPT Accrual Usage-2023-03-15-15-30-01.xml

80 KB

The monthly accrual usage report is attached.

Automation Server: EC2AMAZ-J9VVFN9

Company: University Of Texas Arlington [1]

Description: DEPT Accrual Usage

Started At: 03/15/2023 03:30:01 PM

Completed At: 03/15/2023 03:30:12 PM

Criteria: - Filter by individual's status to exclude suspended

- Filter by individual's status to exclude terminated

- Filter by employee role to include 5 Employee Roles

Download and Export Employee Hours

Both the Individual Hours and Group Hours screens allow you to download hours from TCP.

1. Navigate to either the Individual Hours or Group Hours screen.
 - a. Individual Hours:
 - i. Click on Hours, then Individual Hours.
 - ii. Click on an employee in the Employee List or search for an employee by typing their name or a portion of their name, or their 10-digit employee ID number in the search box.
 - b. Group Hours:
 - i. Click on Hours, then Group Hours.
 - ii. Set the date range you want to review hours for and click Update.
 - iii. You can use the Sort by option to change the order in which employees are displayed in Group Hours. After selecting a Sort By Option and Direction, click the Filter button to update the results table.
 - iv. Group Hours has many useful filters that can be used to display specific subsets of information when viewing hours.

Note: *The Cost Code Filter is not used at UTA.*

1. The Employee Filter allows you to filter hours for only specific employees.
 2. The Position Filter allows you to filter to see segments with specific positions.
 3. The Exception Filter allows you to filter to see segments with only specific exceptions. For example, if you are required to approve all missed punches before processing payroll, you can filter all the segments worked that week to see just those segments that have unapproved missed punches. There are three categories of exceptions you can review:
 - a. Approvals – shift segments missing employee or manager approval.
 - b. Shift - segments that share time with another segment (e.g., clocking in while already clocked in)
 - c. Schedule – shift segments that conflict with the employee’s schedule (e.g., clocking in early or late)
 - v. The hours per employee will display in the table below, organized by employee according to the sort and filters applied.
2. Once you’ve populated the hours you wish to download.

3. Click the Download button.
4. Select the format for the download
 - a. HTML: The output is produced in a .html file that can be opened by a web browser.
 - b. PDF: The output is produced in a .pdf file that can be opened in Adobe Reader or another program designed to read .pdf files. As the .pdf report is more difficult to edit than the other formats, many companies use this for producing reports to send out.
 - c. OpenXML: The report is produced in a .xml file that can be opened in Microsoft Excel or OpenOffice.

The screenshot shows the 'Group Hours' report interface. At the top right, there are three buttons: 'Options', 'Download' (highlighted with a red box), and a help icon '?'. Below these are filters for 'Sort by: ID', 'Start date' (1/2/2023), 'Stop date' (1/8/2023), and 'Period' (Manual). There is an 'Update' button. Below the filters are buttons for 'Employee Filter', 'Position Filter', 'Cost Code Filter', and 'Exception Filter', along with a 'Show absences' checkbox. A note at the bottom states: 'In order to increase performance and enhance the functionality of our software, Group Add Hours has been made part of a new feature Mass Hours. To add or edit hours for multiple employees and multiple segments use Mass Hours.'

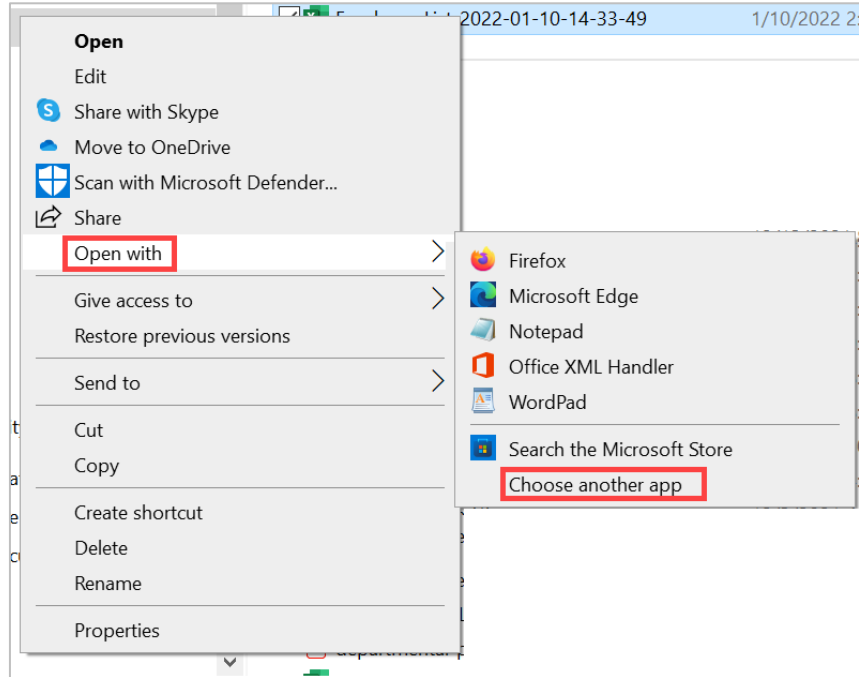
How to Open “OpenXML” Report in Excel

Documents with an “XML” file type may initially open in something other than Excel, or your computer may ask with what application to open the file. The instructions below will detail how to open the file as an Excel Spreadsheet.

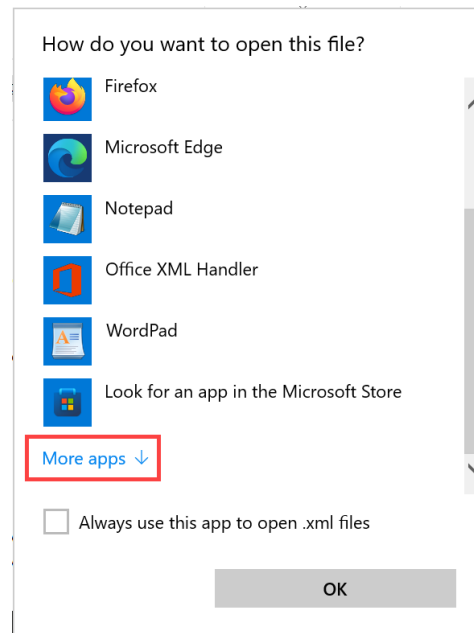
For PCs

1. Download the file and save it to your computer.
2. Go to the file in File Explorer on your computer.

3. Right-click on the downloaded file and select "Open With".
4. If Excel is not an option, click on "Choose another app".

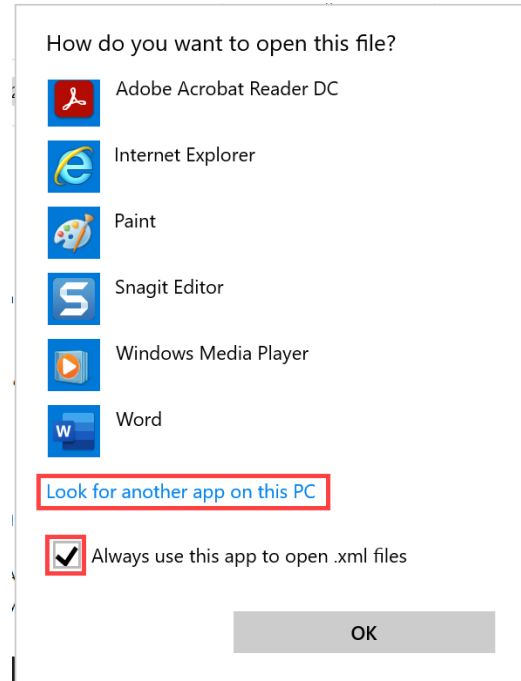


5. Select the "More Apps" link.

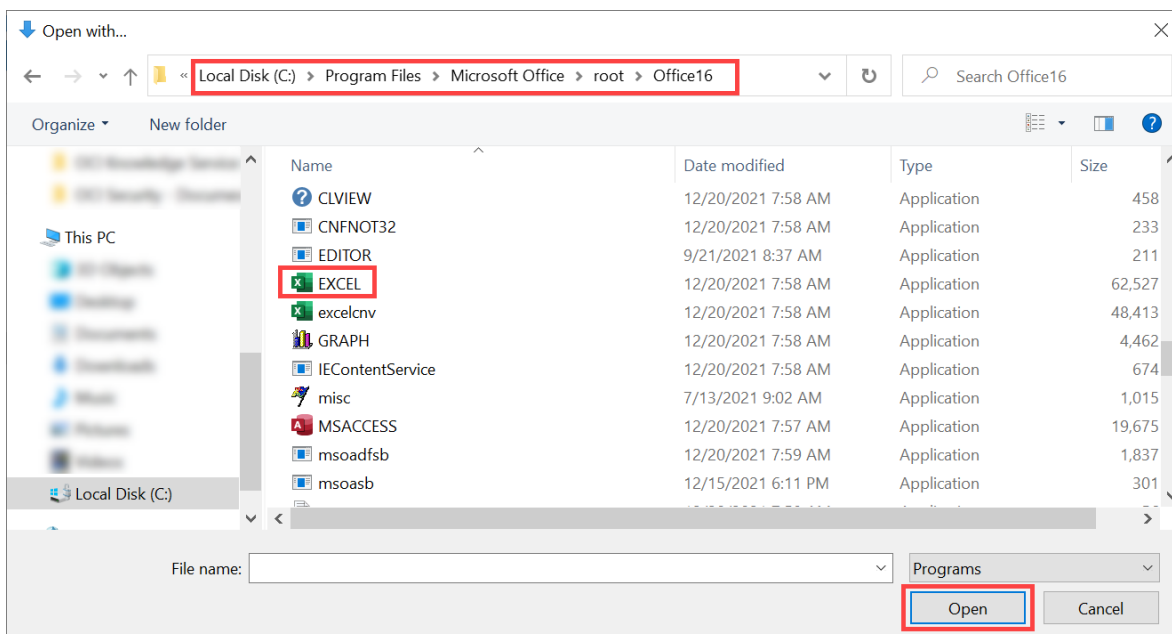


6. From here select Excel.
 - a. If Excel is listed on the More Apps page, click Excel.
 - i. Click the box for click the box for "Always use this app to open .xml files".
 - ii. Click the "OK" button.


- b. If Excel is not listed on the More Apps page, click the checkbox for “Always use this app to open .xml files” then click the “Look for another app” link.

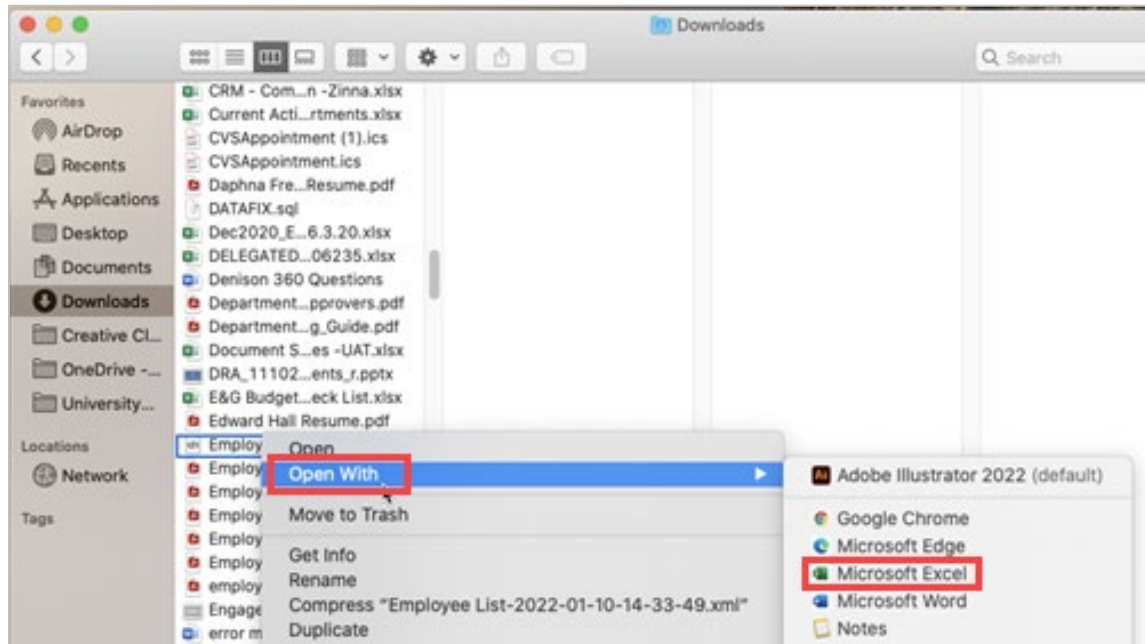


- i. Navigate to the Office16 folder at: Local Disc (C:) > Program Files > Microsoft Office > root > Office 16.
- ii. Find and Click on “Excel”.
- iii. Click the “Open” button.

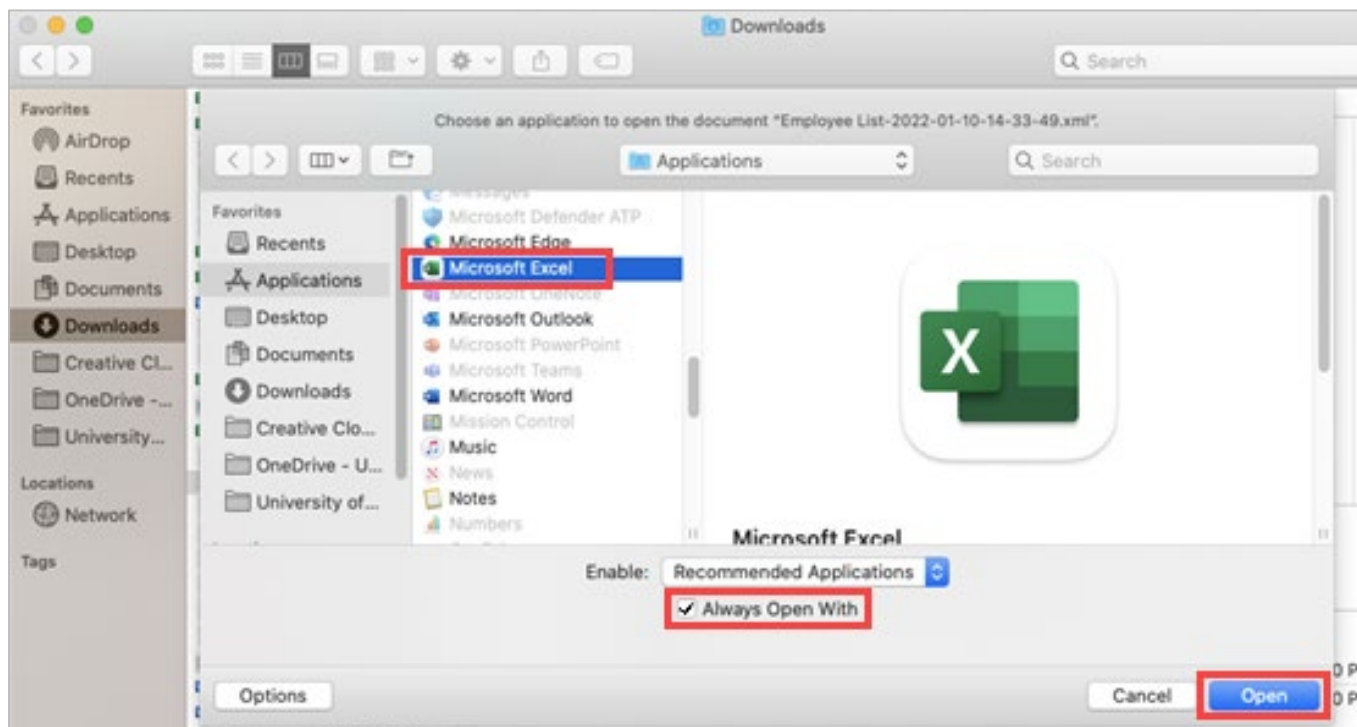


For Apple Computers

1. Download the file and save it to your computer.
2. Click on Finder. 
3. Right click on the downloaded file and select “Open With”
4. Select Excel.



- a. If Excel is not listed as an option, click “Other...”
- b. In the Applications screen, find and click on Microsoft Excel.
- c. Click the “Always Open With” check box and click “Open”.



Once you have opened a .XML file with Excel, Excel should populate on the list of applications that populate in the “Open With” screen. If your computer does not automatically open the next .XML file with Excel, be sure that the “Always use this app to open .xml files” (for PCs) or “Always Open With” (for Apple) box is checked.