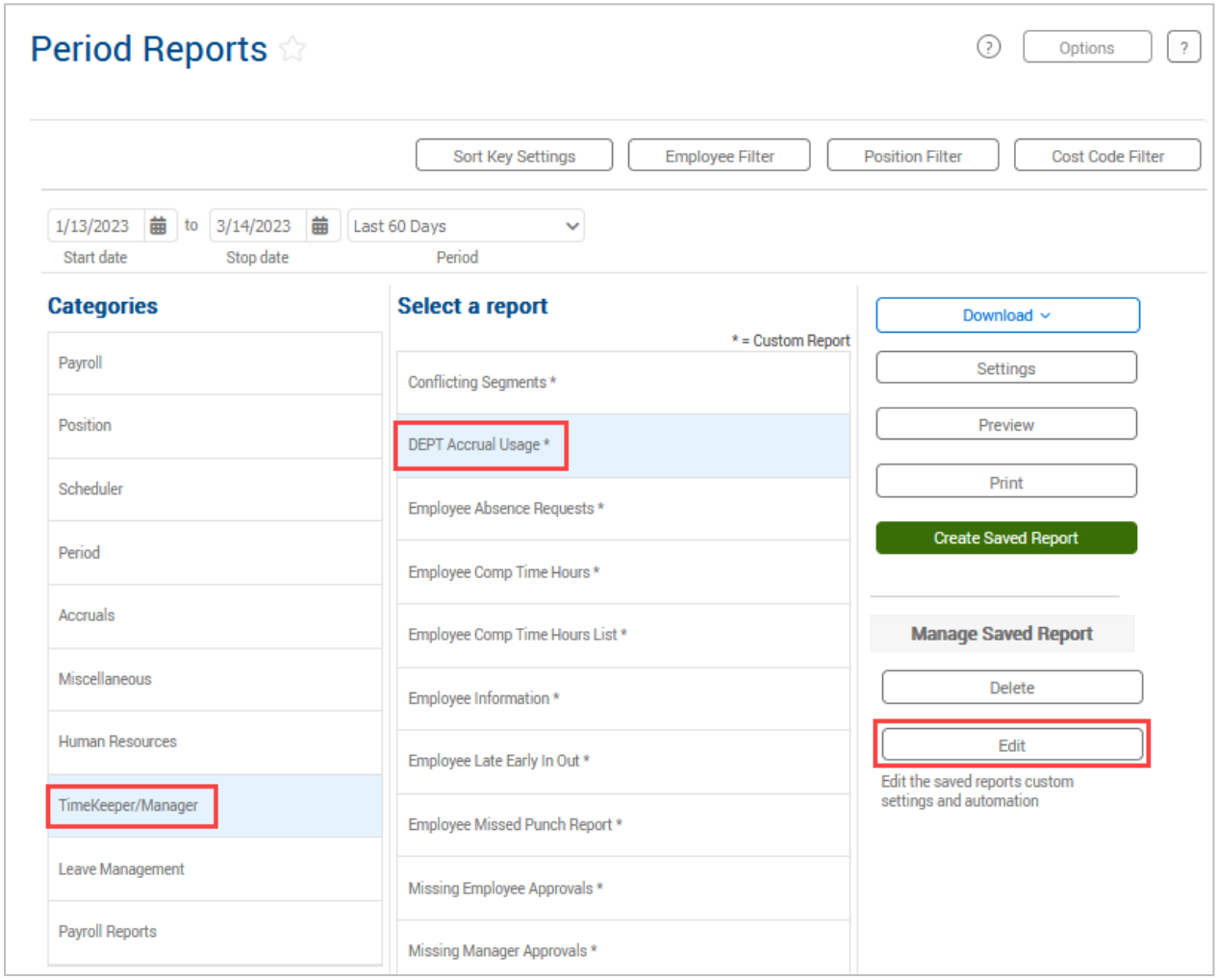
Scheduling Report Automation

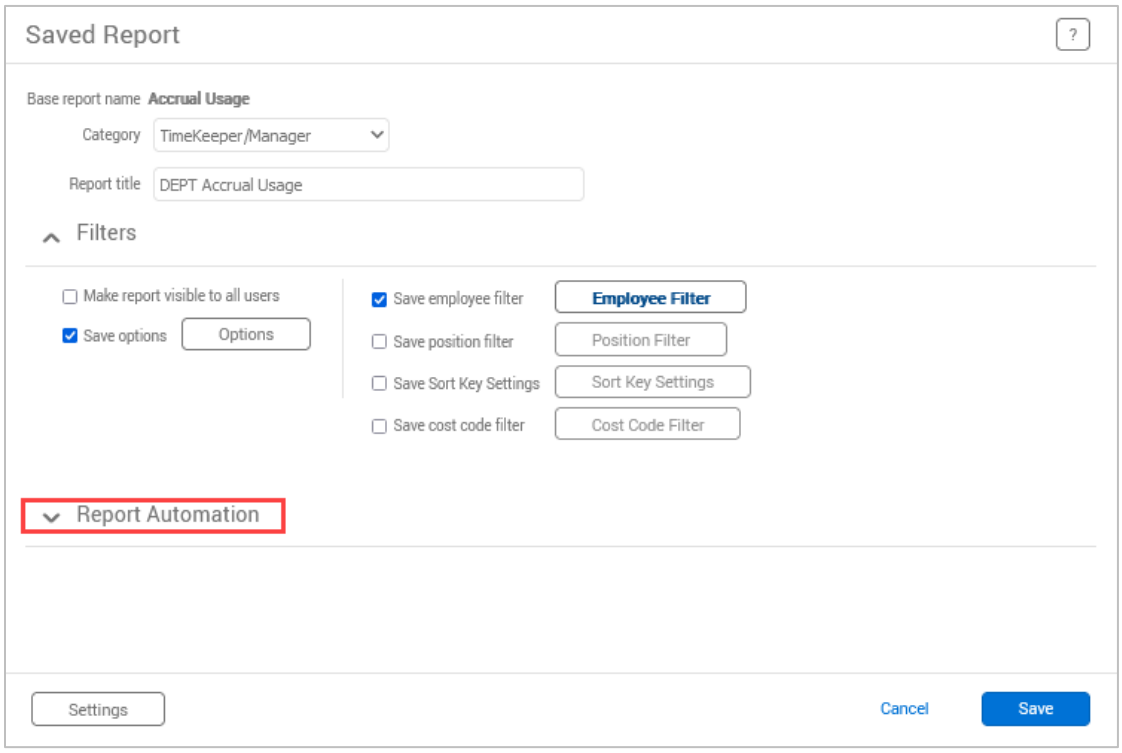
The purpose of this job aid is to explain how to schedule a custom report for a select group of employees. To schedule automation, you must have created your own report.

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

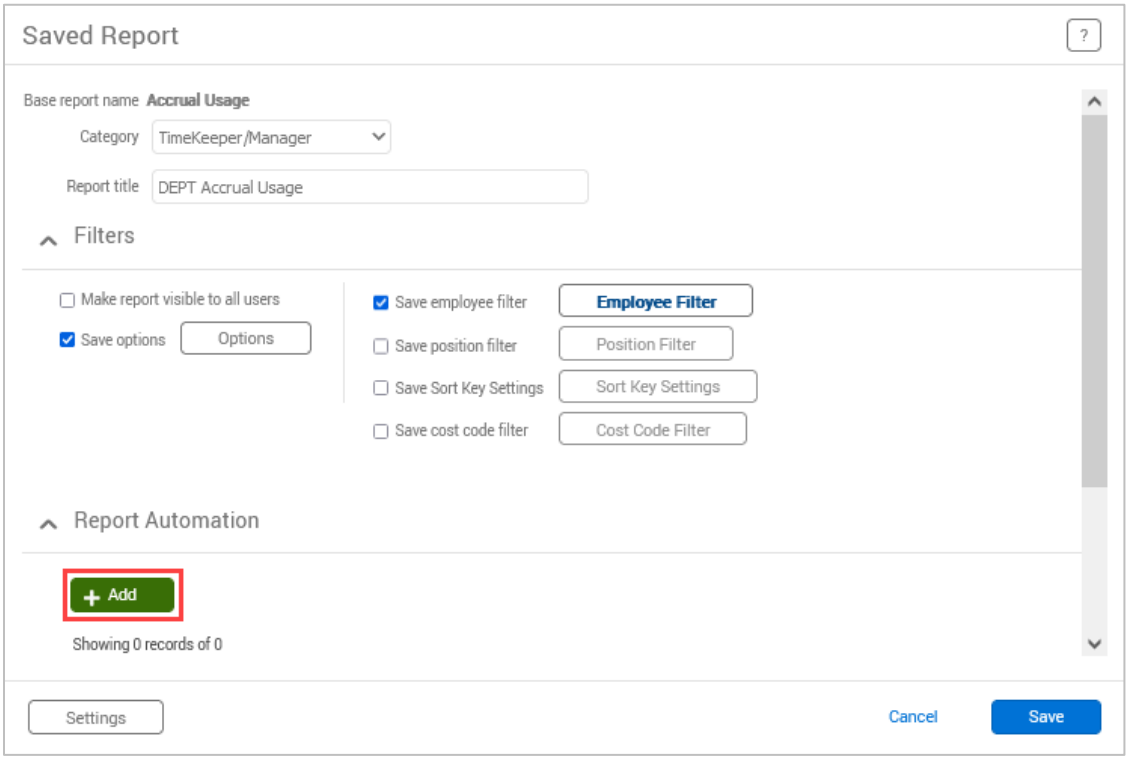


Note: *The dates and filters do not need to be set on the Period Reports screen – they are set on the custom report. It will take a moment for the report information to populate.*

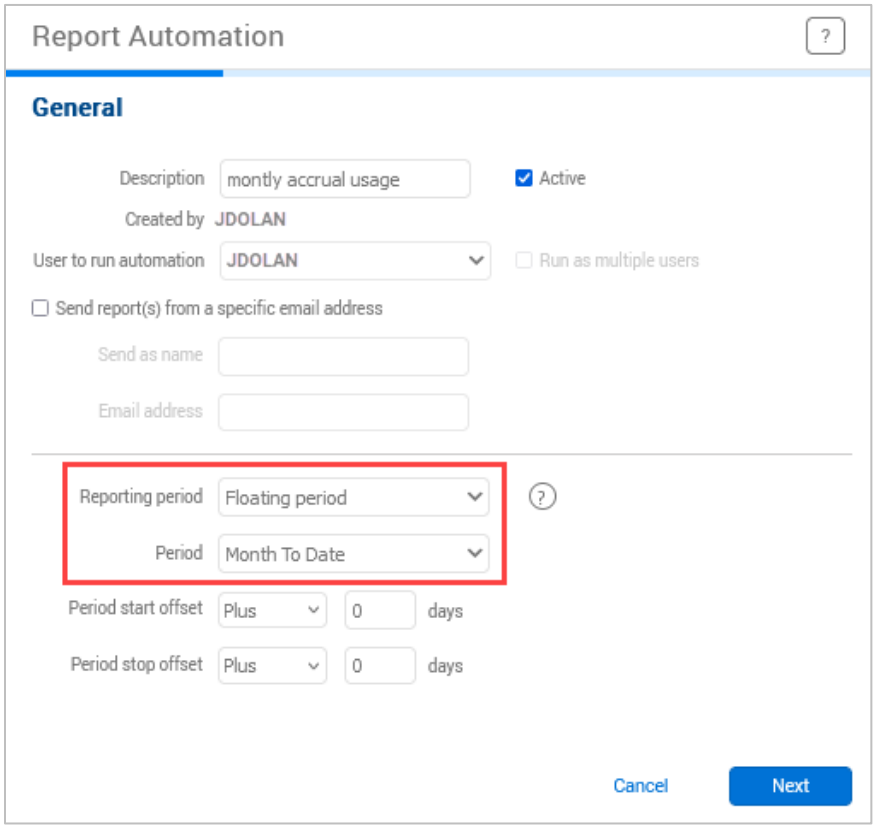
4. Expand the section for Report Automation.



5. Click the + Add button.



6. Enter a description for the report automation.
7. Select the Reporting Period.



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. If using this option, also select the "Period" – this indicates which dates will be included.

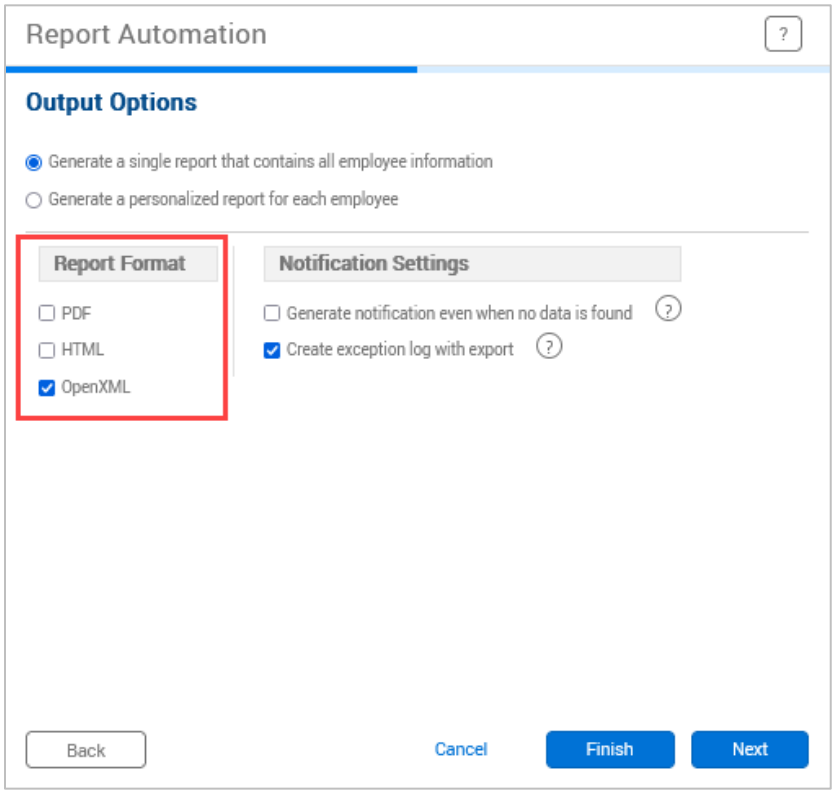
Note: *The first open date is displayed in the center of the top TCP header.*

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.

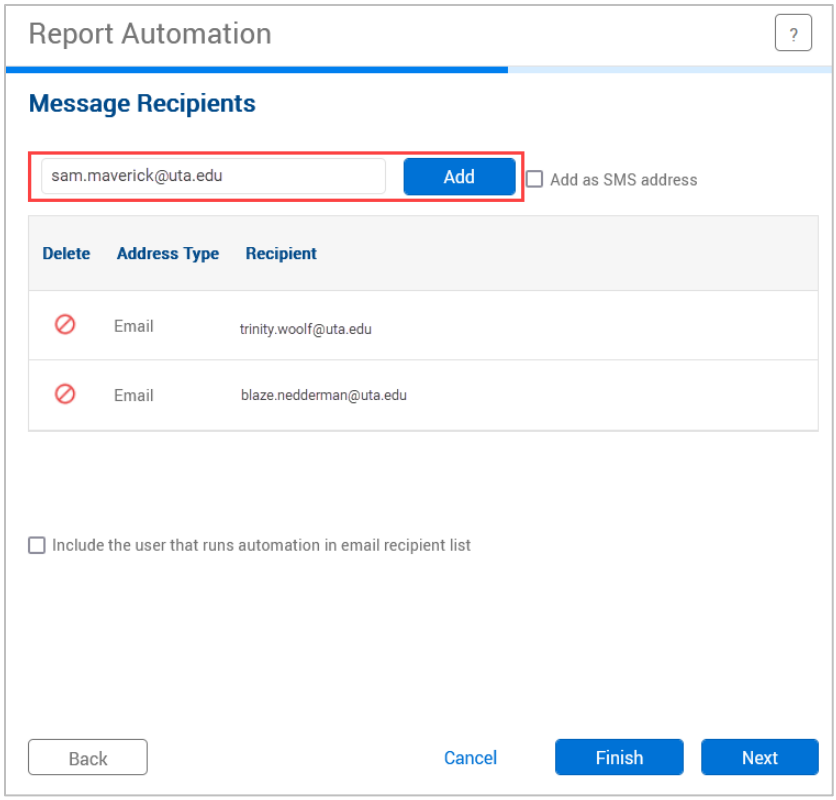
9. On the Output Options screen, indicate the desired report format. PDF or OpenXML are recommended.
10. If desired, check the Notification Setting for "Generate notification even when no data is found".
11. Click the Next button.



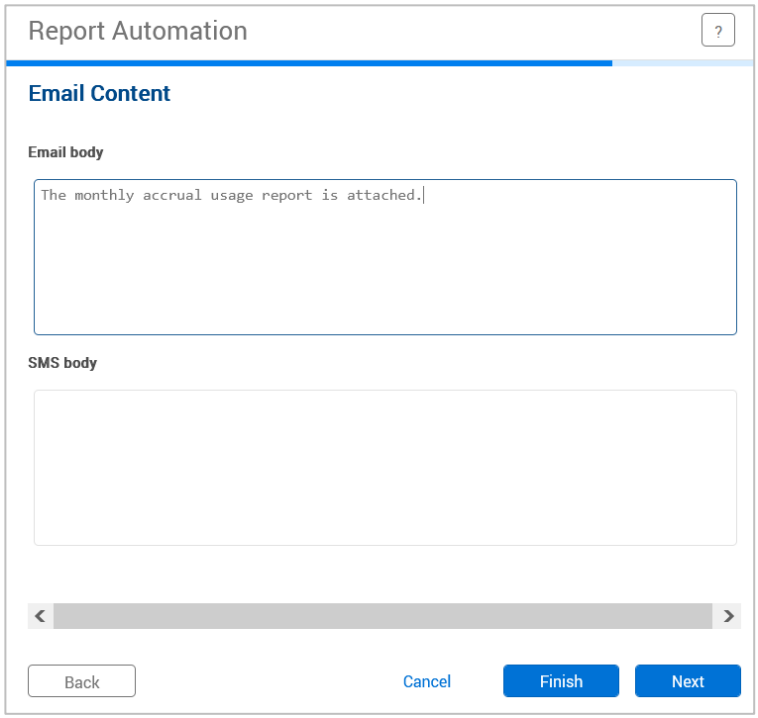
12. On the next screen, enter the email address(es) of the employees to whom the report should be sent.

    Enter the email address then click the Add button.

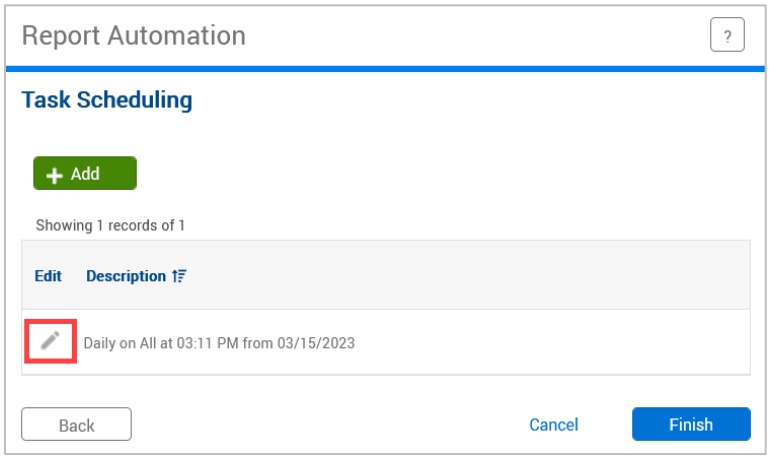
    Email addresses that have been added will be displayed in the table.



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



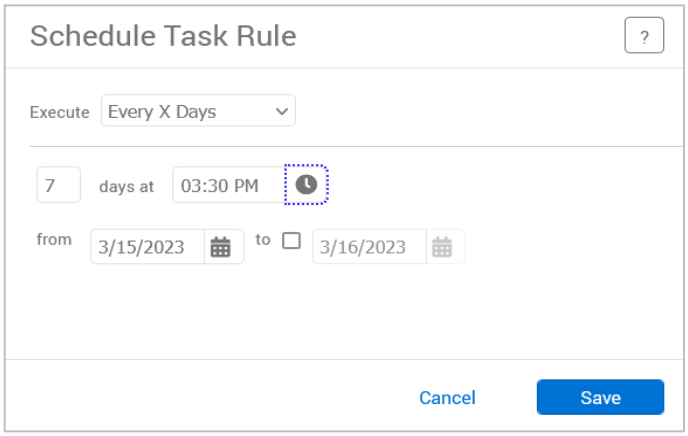
14. In the Task Scheduling box, you will see the occurrences when the report was generated. Click the Edit (pencil) button.



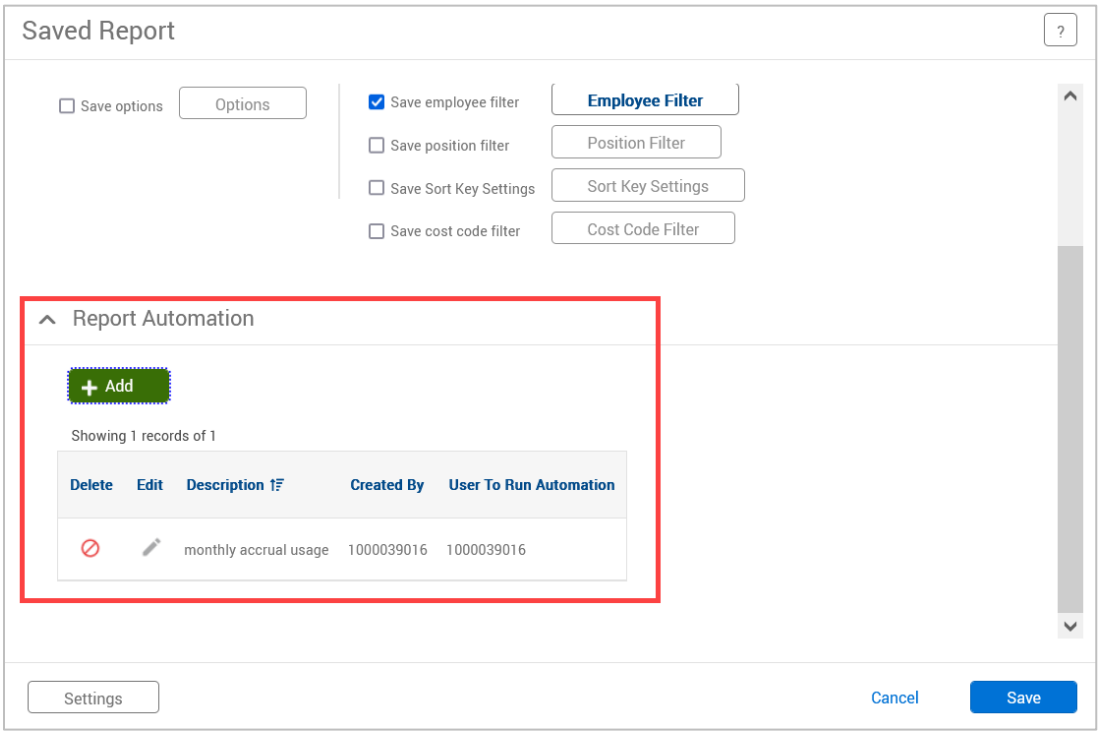
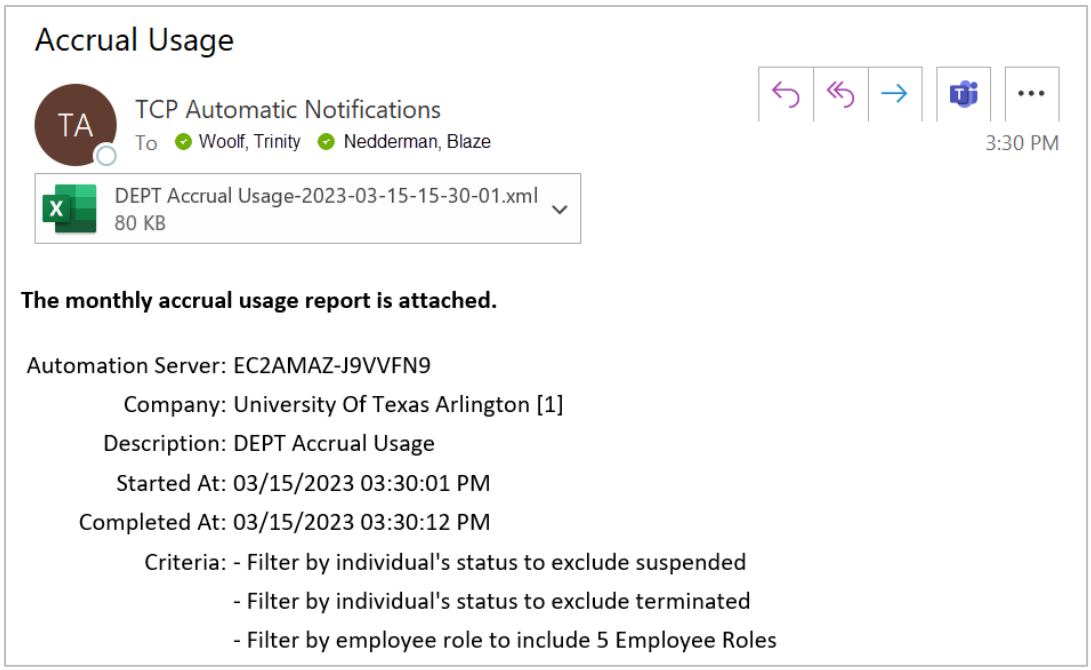
15. On the Schedule Task Rule box, select how frequently the report should run using the Execute selection.

    Enter the date and time that the report should run, which will send the email. The time should be at least five minutes after the current time.

    Click Save to save the frequency, date, and time.



16. Click the Finish button 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.



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