

## 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.

The screenshot shows the 'Period Reports' interface. At the top, there is a title 'Period Reports' with a star icon, a help icon, and an 'Options' button. Below the title are filter buttons for 'Sort Key Settings', 'Employee Filter', 'Position Filter', and 'Cost Code Filter'. A date range selector shows '1/13/2023' to '3/14/2023' with a 'Last 60 Days' dropdown. The main content is divided into three sections: 'Categories', 'Select a report', and 'Manage Saved Report'. In the 'Categories' section, 'TimeKeeper/Manager' is selected and highlighted with a red box. In the 'Select a report' section, 'DEPT Accrual Usage \*' is highlighted with a red box. In the 'Manage Saved Report' section, the 'Edit' button is highlighted with a red box. The 'Create Saved Report' button is green, and the 'Delete' button is grey.

**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.

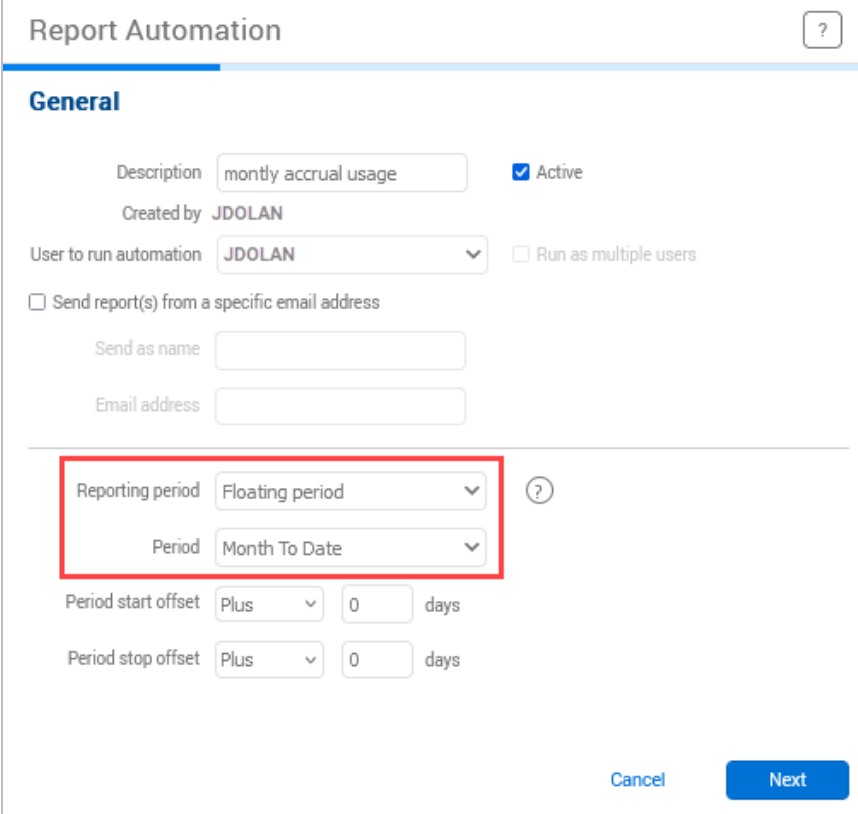
4. Expand the section for Report Automation.

The screenshot shows the 'Saved Report' configuration window. At the top, the title is 'Saved Report' with a help icon. Below the title, the 'Base report name' is 'Accrual Usage'. The 'Category' is set to 'TimeKeeper/Manager' and the 'Report title' is 'DEPT Accrual Usage'. Under the 'Filters' section, there are several options: 'Make report visible to all users' (unchecked), 'Save options' (checked), 'Save employee filter' (checked), 'Save position filter' (unchecked), 'Save Sort Key Settings' (unchecked), and 'Save cost code filter' (unchecked). Each checked option has a corresponding button: 'Options', 'Employee Filter', 'Position Filter', 'Sort Key Settings', and 'Cost Code Filter'. The 'Report Automation' section is expanded, indicated by a red box around the 'Report Automation' header. At the bottom, there are 'Settings', 'Cancel', and 'Save' buttons.

5. Click the + Add button.

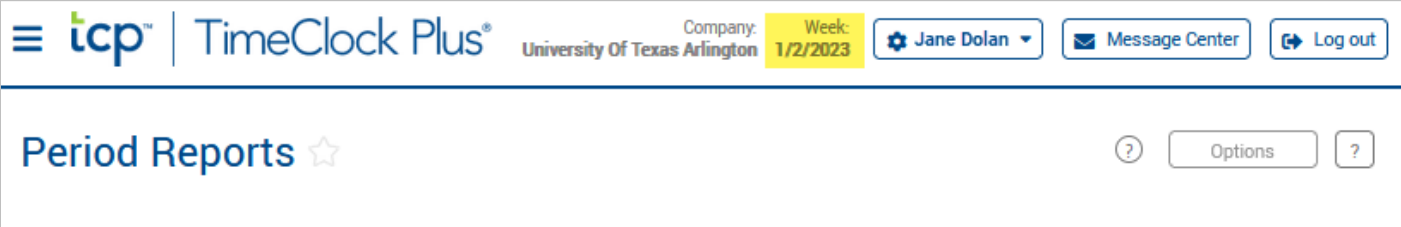
This screenshot is similar to the previous one, but the 'Report Automation' section is expanded further. A red box highlights a green '+ Add' button. Below this button, it says 'Showing 0 records of 0'. The rest of the configuration options and buttons remain the same as in the previous screenshot.

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.

**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

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.

Report Automation

### Email Content

Email body

The monthly accrual usage report is attached.

SMS body

< >

Back Cancel Finish Next


14. 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 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.

**Schedule Task Rule** ?

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Execute Every X Days ▼

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7 days at 03:30 PM 🕒

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from 3/15/2023 📅 to 3/16/2023 📅

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Cancel Save

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

**Saved Report** ?

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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             |


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Settings Cancel Save

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

### Accrual Usage

 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