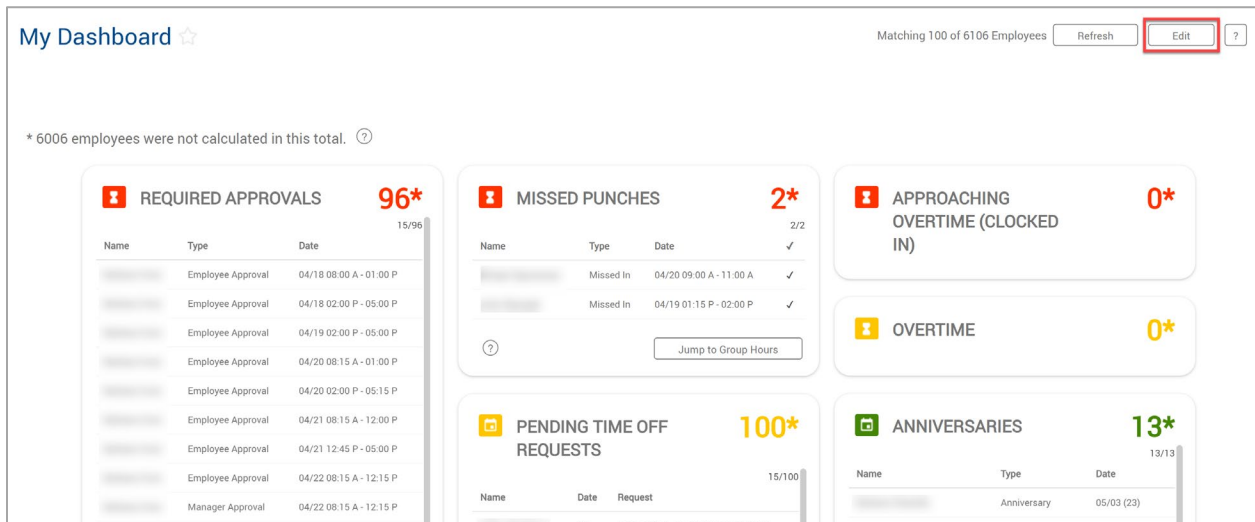


Filtering Employees in TCP Job Aid

The purpose of this job aid is to explain how to filter employees in TCP. Filtering employees in TCP allows users to view employees within specified departments, positions, employee role, etc. This job aid will provide steps to filter employees by Department within the Dashboard, though the steps can be applied to filter employees by other categories.

Note: *The Employee Filter is also available on various pages within TCP. The filter works the same on all pages.*

1. From the Dashboard, click on “Edit”.



My Dashboard ☆ Matching 100 of 6106 Employees Refresh Edit ?

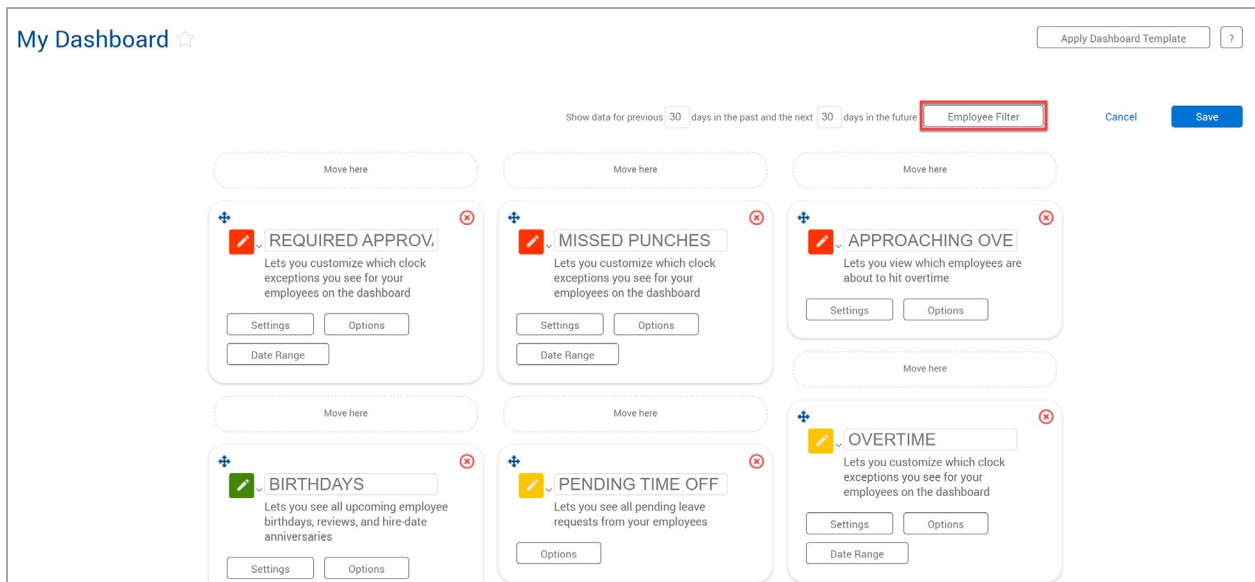
* 6006 employees were not calculated in this total. ?

Name	Type	Date
██████████	Employee Approval	04/18 08:00 A - 01:00 P
██████████	Employee Approval	04/18 02:00 P - 05:00 P
██████████	Employee Approval	04/19 02:00 P - 05:00 P
██████████	Employee Approval	04/20 08:15 A - 01:00 P
██████████	Employee Approval	04/20 02:00 P - 05:15 P
██████████	Employee Approval	04/21 08:15 A - 12:00 P
██████████	Employee Approval	04/21 12:45 P - 05:00 P
██████████	Employee Approval	04/22 08:15 A - 12:15 P
██████████	Manager Approval	04/22 08:15 A - 12:15 P

Name	Type	Date
██████████	Missed In	04/20 09:00 A - 11:00 A
██████████	Missed In	04/19 01:15 P - 02:00 P

Name	Type	Date
██████████	Anniversary	05/03 (23)

2. Click on “Employee Filter”.



My Dashboard ☆ Apply Dashboard Template ?

Show data for previous 30 days in the past and the next 30 days in the future Employee Filter Cancel Save

REQUIRED APPROV.

Settings Options Date Range

MISSED PUNCHES

Settings Options Date Range

APPROACHING OVE

Settings Options

BIRTHDAYS

Settings Options

PENDING TIME OFF

Options

OVERTIME

Settings Options Date Range

3. Select “Reset All” to remove any previously selected filters.

Employee Filter [?]

Preview Save as **Reset All**

Employee Status

- Employee ID
- Position
- Classification
- Department
- Location
- Employee Role
- Schedule Group
- Manager
- Job Classes
- Provision
- Qualifications
- Hire Date
- Days Employed
- Custom Fields

Summary

Exclude suspended

Exclude terminated

Exclude salaried

Exclude full time

Exclude part time

Exclude employees with no work status

6106 of 6922 employees match [refresh]

Cancel **Filter**

4. Check the box next to “Department”.
5. Either scroll to locate the department(s) or search for the desired department(s) using the search box.

Employee Filter [?]

Preview Save as Reset All

Employee Status

- Employee ID
- Position
- Classification
- Department**
- Location
- Employee Role
- Schedule Group
- Manager
- Job Classes
- Provision
- Qualifications
- Hire Date
- Days Employed
- Custom Fields

Summary

Include [v]

< Page 1 of 3 > [Select All] [Deselect All] **Search** [magnifying glass]

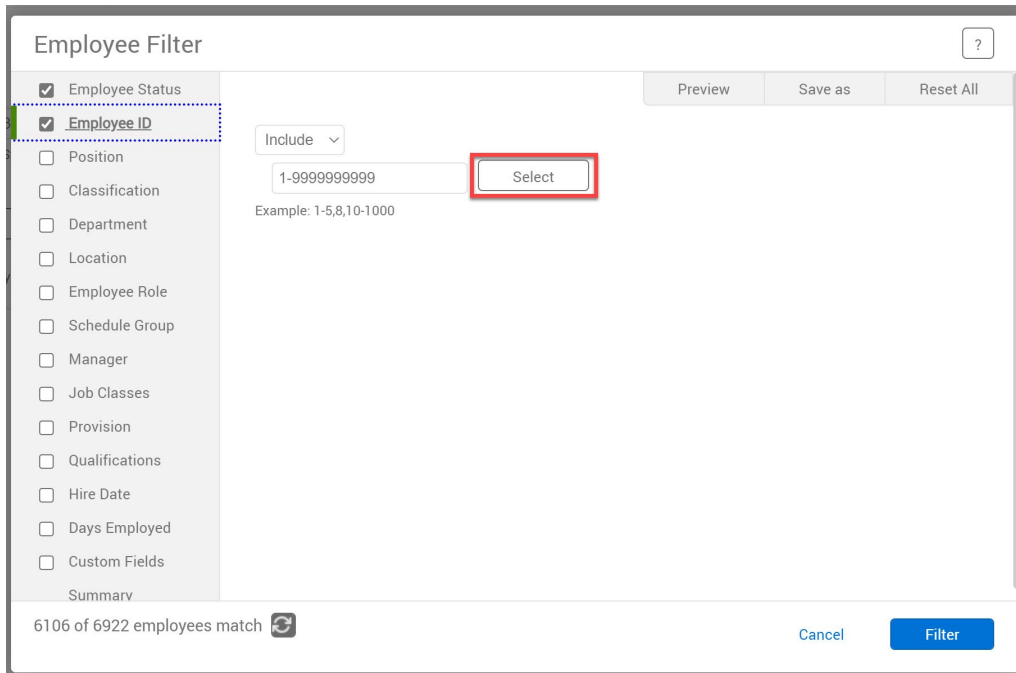
315000 OF TELECOMMUNICATIONS

- 315000 VP-ADMIN AND CAMPUS OPERATIONS
- 315101 POLICE DEPARTMENT**
- 315102 OFFICE OF SUSTAINABILITY
- 315103 HEALTH SERVICES

0 of 6922 employees match [refresh]

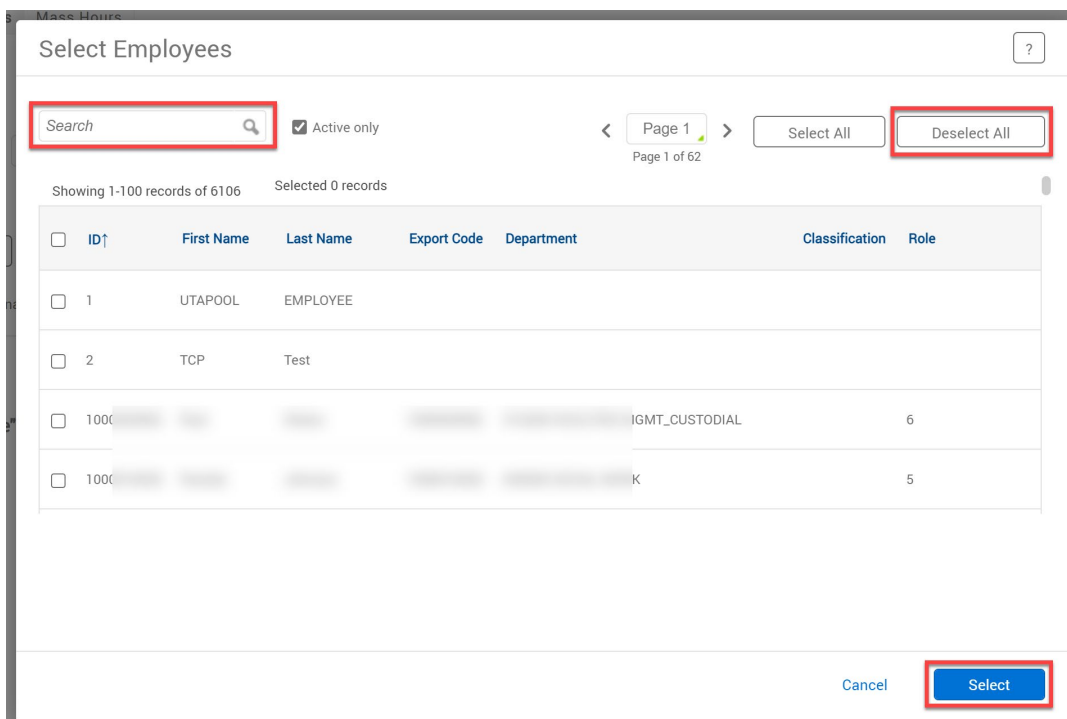
Cancel **Filter**

- a. Alternatively, if using an Employee ID or Position filter, click “Select” to search for employees.



The 'Employee Filter' dialog box shows a list of filter categories on the left. 'Employee ID' is selected and highlighted with a red dashed box. In the center, there is a search box containing '1-9999999999' and a 'Select' button highlighted with a red box. Below the search box is an example: 'Example: 1-5,8,10-1000'. At the bottom, it shows '6106 of 6922 employees match' and a 'Filter' button.

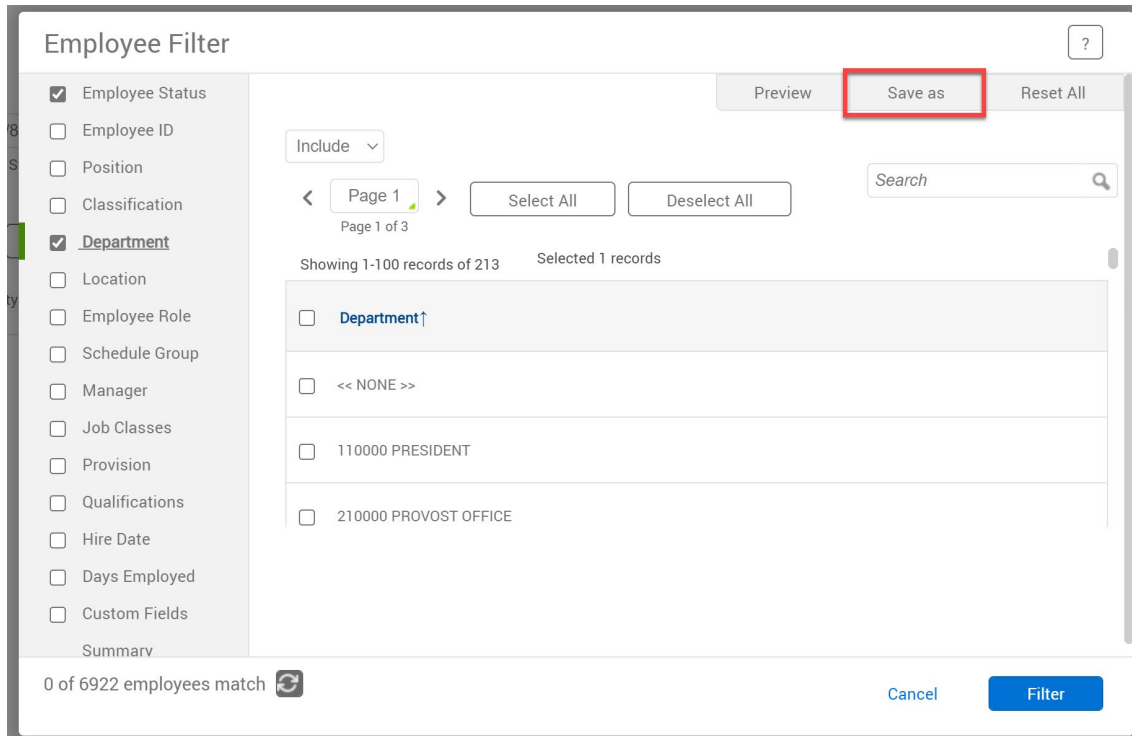
- b. Select "Deselect All" to remove all selections.
- c. Search for employees using the search box, select the check box next to the employee.
- d. Click "Select".



The 'Select Employees' dialog box shows a search box at the top left highlighted with a red box. To its right is a 'Deselect All' button also highlighted with a red box. Below the search box is a table with columns: ID, First Name, Last Name, Export Code, Department, Classification, and Role. The table contains several rows of employee data. At the bottom right, there is a 'Select' button highlighted with a red box.

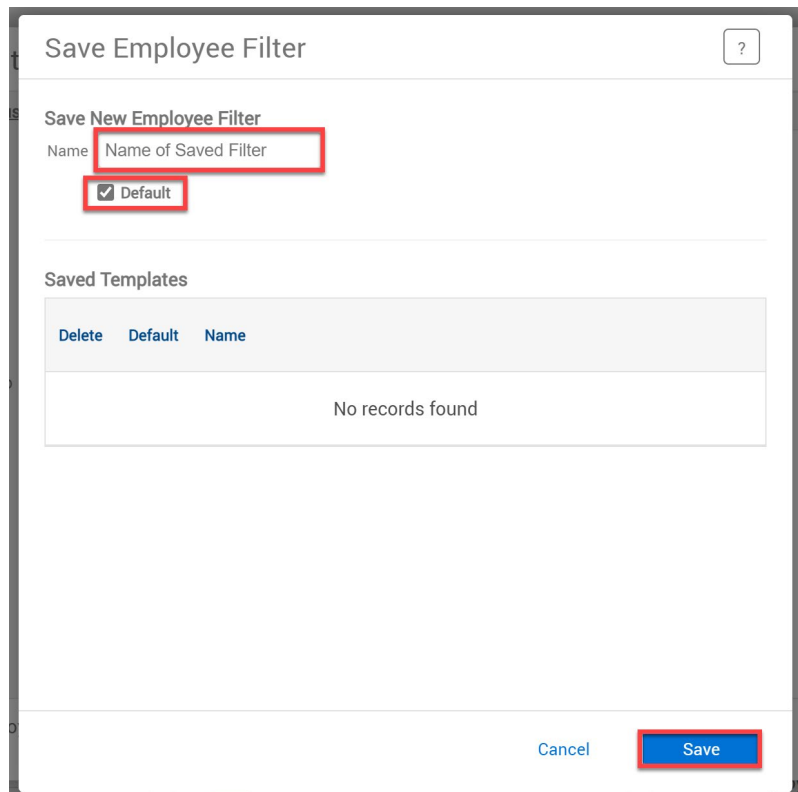
ID	First Name	Last Name	Export Code	Department	Classification	Role
1	UTAPOOL	EMPLOYEE				
2	TCP	Test				
1000					IGMT_CUSTODIAL	6
1000					K	5

- 6. To save the filter as a default filter, select "Save as".



The screenshot shows the 'Employee Filter' interface. On the left is a sidebar with various filter categories, including 'Employee Status', 'Employee ID', 'Position', 'Classification', 'Department' (which is checked), 'Location', 'Employee Role', 'Schedule Group', 'Manager', 'Job Classes', 'Provision', 'Qualifications', 'Hire Date', 'Days Employed', and 'Custom Fields'. The main area shows a list of filters with checkboxes, including 'Department', '<< NONE >>', '110000 PRESIDENT', and '210000 PROVOST OFFICE'. At the top right, the 'Save as' button is highlighted with a red box. At the bottom, there are 'Cancel' and 'Filter' buttons.

- Name the filter, select the Default check box, and click "Save".



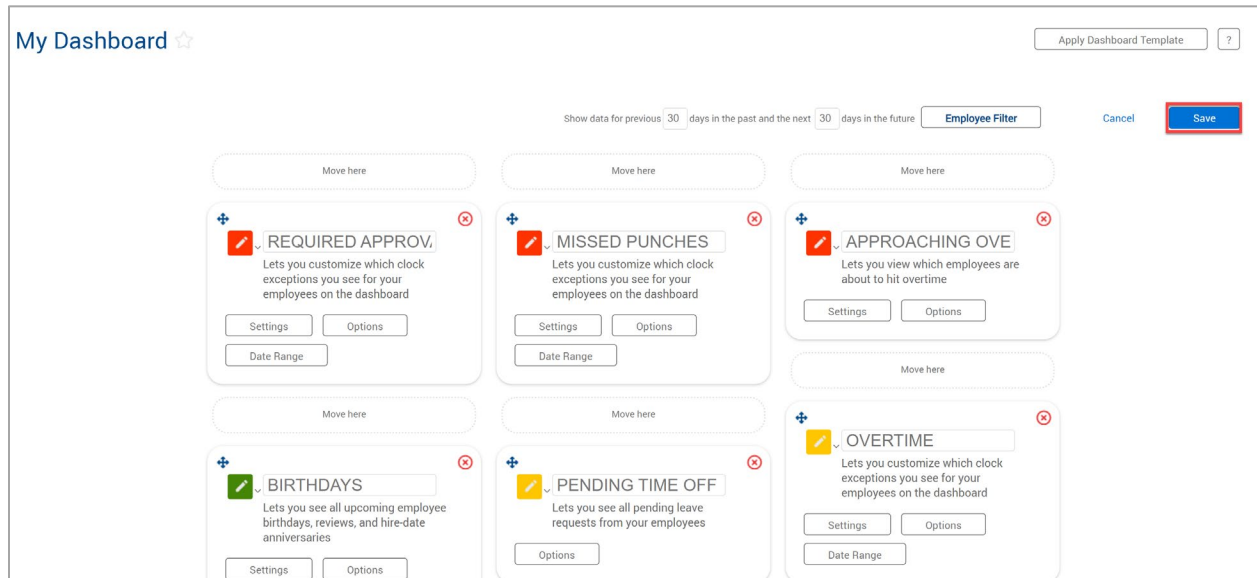
The screenshot shows the 'Save Employee Filter' dialog. It has a 'Name' field containing 'Name of Saved Filter' and a checked 'Default' checkbox, both highlighted with red boxes. Below is a 'Saved Templates' table with columns 'Delete', 'Default', and 'Name', which is currently empty. At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.

Note: To access saved filters, select "Load" within Employee Filter.

- Select "Filter".

Note: The Employee Filter button will now have colored text to indicate the employee filter is active.

- Select "Save".



10. An updated view of employees will populate on the Dashboard.

Note: *Employee Filters may need to be applied to various pages as users navigate through TCP. To apply the employee filter, access the saved filter by selecting “Load” and the filter’s name, within Employee Filters.*