TCP for Timekeepers
# Table of Contents

Introduction to TCP ..................................................................................................................... 1  
Accessing TCP ............................................................................................................................... 1  
  Request TCP Timekeeper Access ............................................................................................ 1  
  Getting into TCP ..................................................................................................................... 2  
TCP Dashboard .............................................................................................................................. 3  
  Apply Custom Timekeeper Dashboard ................................................................................... 4  
TCP Menu .................................................................................................................................. 5  
Timekeeper Responsibilities in TCP ........................................................................................... 6  
  Overview of Timekeeper TCP Processing Steps ..................................................................... 6  
Employee Profiles ....................................................................................................................... 7  
TCP Employee Timelines ............................................................................................................ 8  
  New Hire Timeline .................................................................................................................. 8  
  Employee Transfer Timeline ................................................................................................. 9  
  Employee Termination Timeline ........................................................................................... 10  
Schedules for Employees ............................................................................................................ 11  
  Viewing Employee Schedules ............................................................................................... 11  
  Editing Employee Schedules ............................................................................................... 12  
  Deleting Employee Schedules ............................................................................................ 13  
  Adding a Schedule ................................................................................................................ 14  
  Recurring Schedule ............................................................................................................. 15  
Reviewing Employee Hours ....................................................................................................... 16  
  Individual Hours .................................................................................................................... 16  
  Group Hours .......................................................................................................................... 17  
  Additional Display Options ................................................................................................. 19  
  Displaying Actual and Rounded Punch Hours .................................................................... 20  
  Download Hours ................................................................................................................... 22  
  Punch Location Report .......................................................................................................... 22  
Managing an Employee’s Time ................................................................................................... 23  
  Time Entry Rounding ............................................................................................................ 24  
  Adding Hours for Employee – Hourly Employee ................................................................ 24  
  Adding Lunch Break to Employee Hours ............................................................................. 26  
  Adding Hours for Employee – Salaried Employees .............................................................. 27  
  Adding Mass Hours .............................................................................................................. 28  
  Editing Hours for Employee ............................................................................................... 32  
  Deleting Hours for Employee ............................................................................................... 32
Adding Shift Notes ................................................................................................................ 32
Splitting Segment .................................................................................................................. 34

Addressing Exceptions ........................................................................................................... 34
Viewing Exceptions ................................................................................................................ 35
Address Exception for One Time Segment ........................................................................... 36
Address Exceptions for Multiple Time Segments ................................................................. 37

Managing Leave Requests ...................................................................................................... 37
Request Manager .................................................................................................................... 38
View Submitted Requests ...................................................................................................... 39
Editing a Request for an Employee ........................................................................................ 41
Adding a Request for an Employee ....................................................................................... 43
Adding FMLA Leave Request ............................................................................................... 45
Cancel an Employee Leave Request Job Aid ........................................................................ 46
Vacation Requests from New Hires ...................................................................................... 47
Viewing Employee Leave Accruals ....................................................................................... 49
Vacation Requests from New Hires ...................................................................................... 50
Monitoring Leave Accrual Balances ..................................................................................... 52

Overtime Compensatory Time Payout ................................................................................... 54

On-Call Compensatory Time Entry ....................................................................................... 55

Reviewing Employee Attestations ......................................................................................... 57
Employee Attestation in Employee Profile ........................................................................... 57
Employee Attestation Report ............................................................................................... 58

Corrections to Payroll After Pay Period Locked ................................................................. 59

Reports ..................................................................................................................................... 60

Suggested Timekeeper Period Reports ................................................................................ 60
Running a Report .................................................................................................................... 60
Create a Report ....................................................................................................................... 65
Edit a Saved Report ................................................................................................................ 67
Open “OpenXML” Report in Excel ....................................................................................... 70
  For PCs ................................................................................................................................. 70
  For Apple Computers .......................................................................................................... 73

Employee Messaging .............................................................................................................. 74

Additional Tools ..................................................................................................................... 79

Incomplete Clock Operation Audit Log ............................................................................... 79
Unresolved Punches ............................................................................................................... 79
Introduction to TCP

TCP is a workforce management solution for time collection, leave requests, and workforce scheduling, all in one application. This software platform is being used to streamline time reporting across UTA, replacing the mixture of time reporting practices at the University. To meet the needs of employees, this solution provides multiple options for reporting time and absences.

TCP will be where employees will clock in and out for work shifts, report and review hours worked, and request to take leave. What an employee is required to complete in TCP is dependent upon their position’s Classification.

<table>
<thead>
<tr>
<th>Position Classification</th>
<th>Required Actions in TCP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative and Professionals (A&amp;P)</td>
<td>Enter leave or other leave types, complete attestation</td>
</tr>
<tr>
<td>Classified Exempt</td>
<td>Enter leave, enter hours worked over 40 (straight comp time), complete attestation</td>
</tr>
<tr>
<td>Classified Non-Exempt/Hourly</td>
<td>Enter all worked hours, enter leave, OT comp payout upon request</td>
</tr>
<tr>
<td>Casual</td>
<td>Enter all worked hours, OT comp payout upon request (OT comp payout is automatic for non-benefits eligible employees)</td>
</tr>
<tr>
<td>Student/ Workstudy</td>
<td>Enter all worked hours, OT comp payout upon request</td>
</tr>
<tr>
<td>Faculty</td>
<td>Enter sick leave or other leave types, complete attestation</td>
</tr>
</tbody>
</table>

Accessing TCP

Request TCP Timekeeper Access

Timekeepers must request access for TCP through the Service Now TCP Access Request form.

1. From Service Now Self Service, select “Accounts & Access”.
2. From the Accounts & Access page, select “Systems Access”.
3. Select the TCP Access Request Form.
4. The form will populate information for employee completing the form. Update the Employee Needing Access field if submitting form for another employee.
5. For “Type of Access”, select “Add Access”.
6. Select the Department(s) that the Timekeeper will need to access in TCP.

TCP Access Request Form

Getting into TCP
TCP will be accessible from the UTA Apps page and will use Single Sign-on. On the UTA Apps page will be two TCP icons: “Time-Employee” and “Time-Manager”. **These icons will populate on an employee’s UTA Apps page once they have completed the corresponding TCP Canvas course.**

- The “Time-Employee” icon should be used to access the TCP Employee Portal where employees will manage and review their own time. This should be used if you need to add hours or submit a leave request for yourself.
- The “Time-Manager” icon should be used to review time for others. This Training Guide focuses on “Time-Manager” functionality in your duties as a timekeeper.
TCP Dashboard

The first page you see when you login to TCP through the Time-Manager icon is the Dashboard. Dashboards contain boxes, or “widgets”, that display various information. Dashboards differ by position classification, and the dashboard seen on Time-Manager view will differ from what is seen on Time-Employee view. You will not be able to clock in or out through the Manager view.

Most widgets have a button to jump to specific features in TCP. For example, in the Required Approvals widget, there is a button to jump to Group Hours. This will take you to the Group Hours page and apply an Exception Filter to display only segments that require a Manager Approval. To return to your dashboard at any time, click My Dashboard in the left-side menu.
Apply Custom Timekeeper Dashboard

Timekeepers can apply a Timekeeper-specific dashboard to make their TCP experience more efficient. This customized dashboard will display the widgets that are in-line with Timekeeper responsibilities.

1. From the Default Dashboard, click the Edit button.

2. Click the Apply Dashboards button.

3. Select the Timekeeper dashboard and click the Apply button.
4. The Timekeeper dashboard will now display, showing the Timekeeping-related widgets.

TCP Menu
The TCP Menu displays on the left side of the TCP page. Clicking on a main menu option will display the sub-menu options.
The menu will collapse when you navigate away from the dashboard, but it can be reopened to navigate to a different page by using the hamburger menu at the top-left of the

![UTA Timekeeper Interface](image)

### Timekeeper Responsibilities in TCP

Timekeepers will be responsible for reviewing and maintaining employee schedules and worked hours, managing changes to reported time, and ensuring hours and leave requests are appropriate and approved prior to work weeks being locked in TCP. Timekeepers are also responsible for reviewing and responding to time exceptions, such as missed punches and conflicting shifts. In addition, timekeepers will be responsible for contacting the Payroll Department to manage and submit corrections to time after weeks and periods are locked for entry.

### Overview of Timekeeper TCP Processing Steps

1. Confirm employees in TCP.
2. Review and, if necessary, adjust employee schedule in TCP (applicable to employees in Classified Non-Exempt and Hourly positions).
3. Review employee time segments and hours for completion and accuracy. Make needed or requested adjustments.
4. Review time segment exceptions and respond as necessary.
5. Review employee Leave Requests to ensure leave is entered and addressed by Managers.
6. If applicable to departmental policies, enter requested Overtime Compensatory Time Payout.
7. Ensure Payroll deadlines are met so any needed entries are adjustments are captured with payroll export to UTShare.
8. At end of pay period, confirm employee and manager approval on time segments and hours. Review attestations for employees in A&P, Classified Exempt, and Faculty positions.

9. Email to Payroll any corrections or adjustments needed after the pay period had been locked.

10. At end of month, review Accrual Balances to ensure available balance for any requests for leave on first day(s) of month.

**Employee Profiles**

As a timekeeper, you have access to view employee profiles, however, you do not have access to make any changes to profiles.

1. To access employee profiles, go to Employee, then Employee Profiles.

2. 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.

3. The information in the Employee Profile is organized in tabs and expandable sections. To expand all sections on a tab, use the Expand all link on the right side of your screen.

**Note:** There are several TCP-delivered fields that are not used by UTA that will, appropriately, be blank.

4. In Employee Profiles, you can view the employees’:
   a. General information
   b. Department assignment
   c. Location assignment
   d. Position assignments
   e. Leave Accrual Bank assignments
   f. Message history
### TCP for Timekeepers Training Guide

The timelines below will detail when an employee will be loaded into TCP, when managers and timekeepers will be able to access them, and when actions will occur on terminated employees.

Please note, as TCP data comes from the Job Data page in UTShare, these timelines do depend on the timing of the UTShare eForm completion. eForms can be submitted up to 30 days in advance to ensure all approvals can be obtained and the eForm completed in a timely manner. If the addition or update has not yet been updated on the Job Data page, it will not yet be seen in TCP.

### New Hire Timeline

#### Before Start Date

- eForm is created for a new hire.
- eForm is approved by all listed approvers.
- eForm is completed: New employee is added in UTShare and MyMav.
- Staff NetID and Email address are created.
  - Email is sent to Reports To manager with new employee’s Staff account details.

**Note:** If it is a student worker they will not get a new EmplID but they will get a staff NetID and email address. All employees will access TCP with their staff email address.
## Start Date

- New employee will have access to UTShare, email, Canvas, most other systems accessible to employees.
- New employee will not have access to TCP.

## Start Date +1 Business Day

- New employee will be added in the TCP application.
  - The Manager of the new employee will have access to them.
  - The Timekeeper will not have immediate access.
- After noon the new employee will be enrolled in the correct TCP Canvas course.
  - Once TCP Canvas course is complete the employee will have access to the Time-Employee application.

## Week After Start Date

- On the Monday after the start date the departmental Timekeeper(s) in TCP should now have access to the new employee: If the start date was a Friday, the Timekeeper access may be delayed another week.
- New employee will be enrolled in New Employee Compliance Training in Canvas: If Compliance training is not completed in required time the new employee account will be disabled.

## Employee Transfer Timeline

### Before Start Date

*Important: Timekeepers and Managers of the previous position will need to ensure all time is correct and approved in TCP prior to the new start date. Access to correct or approve time and leave for the old position will not be available in TCP after the new start date.*

- **eForm is created for a transfer.**
- **eForm is approved by all listed approvers.**
- **eForm is completed: New position is added in UTShare.**

*Note: Emails related to a new employee including EmplID, NetID, or email address are not generated when an employee transfers within UTA.*
Transfer Date

- The employee will still be active in the former position.

**Best Practice:** *Given that the employee will be unable to clock hours on the new position on day 1, maintain their hours outside of TCP. The Manager or Timekeeper can add the hours later on the correct position.*

Transfer Date +1 Business Day

- The employee will be active in the new position in TCP.
- The Manager will be able to access the employee in the new position.
- The Manager will not be able to edit/approve any time segments for the former position.

Week After Start Date

- *On the Monday after the start date the departmental Timekeeper(s) in TCP should now have access to the employee: If the start date was a Friday, the Timekeeper access may be delayed another week.*

Employee Termination Timeline

**Before Termination Date**

*Important:* Timekeepers and Managers of the previous position will need to ensure all time is correct and approved in TCP, and, if necessary, vacation balance obtained, PRIOR to the termination date. **Access to an employee’s time and leave will not be available in TCP after their termination date.**

- eForm is created for a termination.
- eForm is approved by all listed approvers
- eForm is completed: Appointment termination is added in UTShare.

**Termination Date**

- The employee will still have access in TCP to review and approve hours.
Termination Date +1 Business Day

- The employee will be terminated in TCP.
- The Manager will not be able to access the employee in TCP.
- The Timekeeper will still be able to see the employee in TCP but will need to remove the “Exclude terminated” and “Exclude suspended” Employee Filters.

Week After Start Date

- On the Monday after the transfer date the Timekeeper(s) will no longer have access to the employee in TCP.

Schedules for Employees

Schedules for each employee will need to be kept up to date because the attendance policy and occurrences depend on accurate scheduling. Employees will have a default schedule added in TCP, based on their position classification, that can be modified if necessary.

- Classified Non-Exempt and Hourly: 8:00am-5:00pm with 1-hour lunch break
- Casual, Student Worker and Workstudy: no schedule

Note: Since Faculty, A&P, and Classified exempt employees are paid according to their monthly salary, attendance policies and occurrences do not apply to them, thus there is no default schedule for employees in these classifications.

Viewing Employee Schedules

1. Click on Schedules, then Employee.
2. 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.
3. Adjust the Start Date and End Date to view schedules for a date range and click update.
Editing Employee Schedules

1. To edit the schedule, right click on a shift and click Edit. Or, click the Select Schedule checkbox for the shift, click the Manage button, and select Edit.

   Note: You can only edit one schedule shift at a time.

2. Adjust the Time In, Time Out, and Position as needed.

3. When finished, click Save.
Deleting Employee Schedules

1. To delete a schedule for a shift day, right click on the day and click Delete. Or, click the Select Schedule checkbox for the shift, click the Manage button, and select Delete.

2. To delete schedules for multiple days, click the check box for Select Schedule on each day, right click, and click Delete.
Note: When a recurring schedule is edited or deleted, it will be marked as Overridden. This is done to indicate that the schedule has been changed from the employee’s regularly scheduled time.

Adding a Schedule

1. To add a schedule for a day that does not currently have a schedule or to add an additional scheduled segment to an existing schedule, click Add.

2. Enter the Time In.
3. Enter the Time Out.
4. Select a Position.
5. When finished, click Save.

Note: Adding a schedule on the Overrides tab will not result in the schedule recurring in future weeks. These additions are one-time only changes.
Recurring Schedule

The recurring tab displays the recurring schedule that is currently assigned to the employee.

**Note:** *To apply a schedule from Advanced Scheduler, you must first unassign the employee’s recurring schedule if one has been assigned.*

1. Click the Recurring tab.
2. Click the Override role settings checkbox.
3. Click the Unassign icon. This will remove the row for the recurring schedule.

4. Click Assign.
5. Set the Start Date for the new recurring schedule.
6. Click the radio icon for Use recurring schedule.
7. Click the drop down and choose the appropriate recurring schedule. See the default schedules above for details regarding the recurring schedule.
8. Click Assign and then Save.
Reviewing Employee Hours

Timekeepers will need to review hours to identify potential errors in employees’ worked hours during the period and address the errors so that the correct hours will be approved and sent to UTShare for payroll processing. This can include incorrect missed punch corrections and position selections. This can be accomplished using two screens in TCP: Individual Hours or Group Hours. From these screens, you can add, edit, and delete hours. These functions are performed the same way on both screens.

Individual Hours

The Individual Hours screen is used to view one employee’s hours at a time.

1. From the main blue menu bar, click on Hours, then Individual Hours.

2. 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.
Note: If you only want to search within a specific group of employees, you can use the Employee Filter button to filter to that group. This function allows you to filter by attributes such as employee classification and department.

3. On the Hours tab, set the Date Range to the Start Date of your pay period and the End Date of your pay period and click Update or choose a predefined Period range from the drop-down menu.

4. Hours will display in the table below.

Group Hours

Group hours allows you to view hours for all your employees in one location. This makes the review process easier as you can review hours on a mass scale, filter for specific employee groups, and filter for specific exceptions.

1. Click on Hours, then Group Hours.

2. Set the date range you want to review hours for and click Update.
3. 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.

![Sort by: ID](image)

4. Group Hours has many useful filters that can be used to display specific subsets of information when viewing hours. Please note that the text on the filter button will be bolded once the filter has been applied.

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

a. The Employee Filter allows you to filter hours for only specific employees.

b. The Position Filter allows you to filter to see segments for specific positions.

c. 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:

i. Approvals – shift segments missing employee or manager approval.

ii. Shift - segments that share time with another segment (e.g., clocking in while already clocked in)

iii. Schedule – shift segments that conflict with the employee’s schedule (e.g., clocking in early or late)

**Note:** *As you address exceptions that are included in the exception filter, those segments will no longer be shown. This is a useful way to know that all segments with the selected exceptions have been addressed. It is recommended to click on the Exception Filter again and select new exceptions to filter by or click the Restore Default option to reset the filter and display all hours again.*

5. The hours per employee will display in the table below, organized by employee according to the sort and filters applied.
Additional Display Options

There are other display options that can be changed by clicking the Options button in Individual or Group Hours. These options will persist throughout the software once selected.

Additional options that can be adjusted include:

- Time, Date and Hour display formats
- Default Period for viewing hours
- Displaying the day of the week for each time in/out
- Displaying the user ID that granted approval for each segment
- Setting default clock in and clock out times (used when adding hours manually)
  - Changing the highlight colors for the segment based on Missed Punches, Absent segments, Row shading, Conflicting segments
Displaying Actual and Rounded Punch Hours

TCP has been configured so that in and out punches will round to the next 15-minute increment. Actual hours can be displayed by changing the Display Options on both the Individual and Group Hours pages.

1. Click the Options button.

2. Under the Display section, click the box for “Display actual punch times in addition to rounded times”
   a. To keep actual punch times on hours screens, also click the box for “Always display actual times”.

   ![Options button highlighted on Individual Hours page]

   ![Options button highlighted on Group Hours page]
3. Click the Apply button to apply the change.

Before:

<table>
<thead>
<tr>
<th>Break</th>
<th>Details</th>
<th>Time In</th>
<th>Time Out</th>
<th>Hours</th>
<th>Shift Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>5u</td>
<td></td>
<td>6/8/2021 10:00 AM</td>
<td>6/8/2021 10:25 AM</td>
<td>0:25</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>6/8/2021 10:30 AM</td>
<td>6/8/2021 10:30 AM</td>
<td>0:00</td>
<td>0:25</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6/8/2021 11:30 AM</td>
<td>6/8/2021 11:30 AM</td>
<td>0:00</td>
<td>0:00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6/8/2021 12:45 PM</td>
<td>6/8/2021 12:45 PM</td>
<td>0:00</td>
<td>0:00</td>
</tr>
<tr>
<td>17u</td>
<td></td>
<td>6/8/2021 12:45 PM</td>
<td>6/8/2021 12:45 PM</td>
<td>0:00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>6/8/2021 01:02 PM</td>
<td>6/8/2021 01:15 PM</td>
<td>0:13</td>
<td></td>
</tr>
</tbody>
</table>
After:

<table>
<thead>
<tr>
<th>Break length</th>
<th>Time In</th>
<th>Actual time in</th>
<th>Time out</th>
<th>Actual time out</th>
<th>Hours</th>
<th>Shift Total</th>
</tr>
</thead>
</table>

**Download Hours**

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

1. Populate the hours you wish to download as per the instructions above.
2. Click the Download button.
3. 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.

**Punch Location Report**

The Punch Location report will return the information regarding where the entries on an employee’s timesheet were performed or requested. If the entry is a time segment, the report will display the location for their clock in and the location for their clock out, as indicated with the
red boxes. If the entry is for timesheet hours (a quantity of hours) the report will display where that was entered and show “<Time sheet>” for the Time Out, as seen on the entry for 11/8.

All RDT timeclocks have been assigned names in TCP. To determine the location of the RDT, please see the “TCP RDT Clock Locations” document posted on the Knowledge Services Business Apps page.

Managing an Employee’s Time

Upon reviewing an employee’s hours, it may be necessary to submit adjustments on the employee’s behalf.

**Note:** Do not add or edit Leave Requests from the Hours pages. All changes to Leave Requests should be made through the Request Manager page (except for Administrative Leave and Unpaid Leave – these should be entered directly on the Timesheet by the Timekeeper). See the **Managing Leave Requests** section for further information.
Time Entry Rounding
When adding or editing time, it is necessary to input the employee’s time according to the University's rounding standard. The standard involves rounding down if the actual time is within seven minutes of the nearest 15-minute increment, or quarter hour. Alternatively, round up if the employee’s time is within 8 minutes of the nearest 15-minutes, or quarter hour.

This standard applies for all time entries; start in time, lunch out time, lunch in time, and out time for day.

<table>
<thead>
<tr>
<th>Actual Punch</th>
<th>Rounded Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:07</td>
<td>8:00</td>
</tr>
<tr>
<td>8:08</td>
<td>8:15</td>
</tr>
<tr>
<td>8:34</td>
<td>8:30</td>
</tr>
<tr>
<td>8:38</td>
<td>8:45</td>
</tr>
</tbody>
</table>

Adding Hours for Employee – Hourly Employee
1. On either the Individual or Group Hours screen, navigate to the employee for which the hours need to be entered. See the Individual Hours or Group Hours section for additional instruction.
2. Adjust the Start and Stop dates if necessary.
3. Click on the Add button.
4. Enter the date and time in the fields for Time in and Time out.
5. If you are clocking in an employee on their behalf, check Individual is clocked in and click Save. This will update the employee’s current status to Clocked In. Use this option only if the employee is currently working and will clock out for the shift.
6. Specify the position worked for this shift by clicking the Position drop-down and selecting the appropriate position.

7. If the segment was the result of a missed punch, you can indicate this by selecting Missed in punch and/or Missed out punch.

8. Enter a note for the added segment if in the Note field.

Note: Anytime a timekeeper adds time on an employee’s behalf, a note should be entered.

9. If you are adding segments for multiple days in a row with the same Time In and Time Out, you can change the number of days using the Days drop down menu.

10. Click Save.

The hours will now appear as a row for the employee. The added hours will require an approval by the employee and manager.
Adding Lunch Break to Employee Hours

When adding hours to an employee that includes a lunch break, add the hours following the above instructions, Adding Hours for Employee, then use the steps below to add the break to the hours.

1. Select the hours segment needing the break using the checkbox.
2. Click on the Manage button
3. Click Add break.

4. If necessary, adjust the time the break started.
5. Enter the Break length as the number of minutes to be recorded for the break.
6. Click Save.
7. There will now be two rows for the day, separated by the indicated break.

![Image of a timesheet with two rows and additional columns.]

**Adding Hours for Employee – Salaried Employees**

1. On either the Individual or Group Hours screen, navigate to the employee for which the hours need to be entered. See the [Individual Hours](#) or [Group Hours](#) section for additional instruction.

2. Adjust the Start and Stop dates if necessary.

3. Click on the Add button.

4. Click the checkbox for Timesheet entry. This will allow you to enter a quantity of hours rather than an in and out time.

5. Enter the date and time in the fields for Time in.

6. Enter the quantity of Hours to be added.

7. Specify the position worked for this shift by clicking the Position drop-down and selecting the appropriate position.

8. Enter a note for the added segment if in the Note field.

**Note:** *Anytime a timekeeper adds time on an employee’s behalf, a note should be entered.*

9. If you are adding segments for multiple days in a row with the same quantity, you can change the number of days using the Days drop-down menu.

10. Click Save.
The hours will now appear as a row for the employee. The added hours will require an approval by the employee and manager.

**Adding Mass Hours**

Mass Hours allows users to add, edit, and delete the same time segments for multiple employees. This is a powerful suite of tools that saves users time, but it must be used with care to ensure that operations only add, edit, or delete the correct segments.

1. Navigate to Hours, then Mass Hours.
2. Choose one of the two radio buttons:
   - Select using filters: Choose employees by either creating a new filter or applying a previously created filter.
   - Select employees from list: Fill this radio button to open a complete list of the organization’s employees. Select them by clicking the adjacent checkboxes, which highlights them in blue.
Note: When a filter has been applied successfully, an “Operation Successful” tab will be briefly displayed at the top of the page.

3. Select the Next button in the upper right corner.
4. The Select Operation screen appears. Select the Add Hours entry. The software highlights it in blue after selection.

5. The Add Hours screen appears. Use the following options as necessary.
   - Individual is clocked in: Fill this checkbox if the individual is currently working.
   - Time sheet entry: Fill this checkbox if manually entering only a quantity of hours (i.e. not punch times, for Classified employee hours).
   - Missed in punch: Fill this checkbox if the employee failed to punch into work.
   - Missed out punch: Fill this checkbox if the employee failed to punch out.
   - Time in: Use the range pickers to select a date and time that the shift begins.
   - Time out: Use the range pickers to choose a date and time that the shift ends.
   - Note: To provide the reason for the add or edit.

Note: Timekeepers should always enter a when entering time for employees.
• Days: If entering hours for multiple concurrent days, use the drop-down menu to select the quantity of days.

6. Click the Next button, which prompts the Summary screen to appear. Look over the results to ensure the correct information will be processed.

7. Select the gray Preview button to ensure that the changes go smoothly. The Processing window appears. Click Show Details to show the segments to be added.
Click the Close link to return to the Processing Window. Then, click the Ok button to return to the Mass Hours process.

8. If the Show Exceptions button turns orange, click it to locate any potential problems.

9. Otherwise, click the Process button in the upper right corner of the main screen.

10. A Processing Window will appear confirming the number of time segments entered.
11. Click the Ok button to confirm the added hours.

**Editing Hours for Employee**

1. From the Individual or Group Hours screen, click on the segment to highlight it, click Manage, and then Edit to access the Edit Segment window. Or, double-click on the segment, or right click and select Edit.

2. The same options that are available in the Add dialog box are available in the Edit Segment dialog box. Make the necessary changes and click the Save button.

**Deleting Hours for Employee**

1. To delete a segment already in the system, from the Individual or Group Hours screen, click on the segment to highlight it, click Manage and Delete. Or, right click on the segment and select Delete.

2. This will bring up a prompt asking you to verify that you want to delete the segment. To delete the segment, click Ok.

**Note:** If a segment is deleted, it is captured in the Audit Log as a permanent record of its removal. This also applies to Add and Edit on segments.

**Adding Shift Notes**

Timekeepers and Managers can enter a note for a segment if needed.

1. On the Individual or Group Hours screen, click the Note icon on the segment.
2. The Manage Work Segments Notes dialog box will pop up if a note has not already been entered.

3. To add a shift note, click Add.

4. Enter a note.

5. Click Save.

6. After a note has been entered, the note icon will turn blue to indicate that a note has been entered for the segment.

7. To view the notes that have been entered on the segment, click the blue icon.

**Note:** You cannot edit or delete notes. You can only add additional notes.
Splitting Segment
If an employee works multiple jobs/positions in one shift, you may be required to change the position for part of the shift.

1. From the Individual or Group Hours screen, right click on the segment. You have the option to split the segment by length or percentage.

2. Click the Split icon.

3. Adjust the times as necessary.

4. Change the Position as necessary.

5. Click Save.

Addressing Exceptions
Exceptions are used to track inconsistencies in worked segments, such as missed punches and hours outside of the employee’s schedule. TCP will generate an exception even if the time segment has been corrected by either the employee or Timekeeper.
Exceptions can be reviewed and addressed one time segment at a time or for multiple time segments exceptions at once, and for one individual employee (i.e., when they notify you of the missed punch) or a group of employees (i.e., for weekly review).

Timekeepers can address exceptions using one of two options:

- Approve the time sheet exception (if the time segment has already been amended or if the exception is a warning [such as for a holiday or the employee was “late”])
- Amend the time segment to resolve the issue that caused the exception (missed punches added, conflicting shifts adjusted, etc.).

Exceptions will need to be addressed and or approved by a Timekeeper prior to the close of the pay period. Please note that approving a time segment exception does not approve the time segment – it will still require the approval of both the employee and the manager.

**Viewing Exceptions**

1. Navigate to the hours using either the Individual Hours or Group Hours screen.
2. Populate the employee(s) and time segments to be reviewed for exceptions.

**Note:** If you view exceptions using the Exception filter on the Group Hours screen, as you address the exceptions, those segments will no longer be shown. This is a useful way to know that all segments with the selected exceptions have been addressed.

3. To view a segment’s exceptions, hover the mouse cursor over the red or blue dot on the individual segment.
   a. A red dot indicates that the segment requires an approval (Requires Approval) and includes:
      i. Missed Punches
      ii. Missing Employee Approval
      iii. Missing Manager Approval
   b. A blue dot indicates that an exception is being tracked on the segment but does not require approval (Exceptions) and includes:
      iv. Late In
      v. Holiday
      vi. Long Break
Note: It is recommended to view all exceptions for all segments before approving time to ensure the accuracy of the time before the week is closed.

Address Exception for One Time Segment
1. With the time segment displayed on either the Individual Hours or Group Hours screen, right-click on the exception dot.
2. Click the Approve radio button for the exception types to be approved.
3. Click the Apply button.
Address Exceptions for Multiple Time Segments

1. With the time segment displayed on either the Individual Hours or Group Hours screen, select the checkboxes for the time segments that contain the exceptions to be addressed.
2. Click the Exceptions button.
3. Select the Approve radio button for all exception types to be approved.
4. Click the Apply button.

Managing Leave Requests

The Request Manager screen allows Timekeepers to view and edit employee time off requests. All leave requests should be submitted through the Request Manager screen. Once requests are approved through Request Manager, they are transferred to the employee’s Hours screen and will need to be approved by the employee and the manager.

**Note:** When managing or adding leave requests for an employee with an active FMLA case, if the leave is related to their FMLA, be sure to use the FMLA template and select the FMLA case on the leave request. See the [Adding FMLA Leave Request](#) section for further details.

Please note, Administrative Leave and Unpaid Leave should not be entered through Request Manager. These two types of leave should be entered on the timesheet through the Individual or Group Hours screen.
Request Manager

The Request Manager screen (Tools > Requests) allows for flexible view options when reviewing employee Leave Requests. You can use filters or select the Leave Request status to display the desired information.

There are two ways to view Leave requests in Request Manager: Calendar and List.

**Calendar View**

Calendar view displays a monthly calendar. Requests are displayed on the date of the requested leave. By default, Calendar view displays 10 requests per day; this can be adjusted by entering the desired number of requests to display and clicking the Apply button. Through the Calendar view, Managers can respond to Leave Requests one at a time.
To move to a different month in Calendar view, use the single arrow to the left or right of the month.

**Note:** *The double arrow will go back or forward one calendar year.*

**List View**

List view displays all requests in a list format and is, by default, grouped by Request Date. Managers can change the “Group By” option to view the requests grouped in other ways. From the List view, managers can respond to multiple requests at once using the checkbox to select the request(s) and the Manage button, or right-click menu, to indicate the action to be taken.

---

**View Submitted Requests**

**Note:** *Calendar view will be used for the following steps.*

1. Click on Tools, then Requests. The Request Manager page will populate.
2. By default, requests for all employees will display. To limit the visible requests to one or certain employees, use the Employee Filter or the Position Filter.
3. By default, employee requests will be visible in a Calendar view. To view employee requests in a sortable list, select the List tab.

4. To view detailed information on a request submitted and how its approval will be handled, right-click, and select Detail. Or, click the request and then click the Manage button, or, double click on the request.

5. Information in the Detail dialog box includes:
   a. Employee Information
   b. When the request was submitted
   c. Who submitted the request
   d. The date of the request
   e. The leave code
   f. The number of hours requested
   g. The leave bank the hours will be deducted from
   h. The employee’s accrual balances
   i. If any approvals have been made for the request
   j. The description entered by the employee (if applicable)
   k. Options for transferring the hours to the employee timecard upon approval of the request
Editing a Request for an Employee

Employees are responsible for creating their own leave requests. Timekeepers have access to edit leave requests for employees if the request has not yet been approved.

1. Navigate to the pending leave in either Calendar or List view.

2. Access the request details by right-clicking on the request and select Detail. Or, click the request and then click the Manage button, or double click on the request.
3. On the Request Details page, click Edit.

4. Adjust the leave request details as necessary.

**Note:** Anytime a timekeeper adjusts a leave request on an employee’s behalf, a note should be entered in the Description field.

5. Click Ok to update the request.
Adding a Request for an Employee

It is the employee’s responsibility to enter their leave requests. However, certain situations will require the Timekeepers to enter leave requests on behalf of the employee. Once submitted, the employee’s supervisor, along with their supervisor, will receive an email notification of the request.

1. Click on Tools, then Requests. The Request Manager page will populate.

   ![Request Manager Page]

2. If necessary, use the single arrow navigation button to go back to the appropriate month.

   **Note:** The double arrow navigation will go back one calendar year.

3. Select “Add” or click the “+” sign on the day you would like to add leave to on behalf of your employee.
4. Complete the leave request.
   a. Type in the employee’s name to select the employee.
   b. If you used the Add button, enter the date. If you used the “+” sign on the day it will be on the selected day.
   c. Select the appropriate Template for the type of leave being requested.
   d. Update the hours if it was a partial day’s leave, and the days if it was more than 1 day.
   e. If applicable, select the correct Leave Code.
   f. Answer the question about documentation when applicable.

   **Note:** Only applicable when using the “Other” Template.

   g. Optional – you can send the employee a notification of this leave request entry by checking the “Send user notification” box.

   h. Press Save.
5. A processing window will appear. Select “OK”. The leave request will then appear on the calendar as pending, awaiting manager approval.

Adding FMLA Leave Request

When submitting leave requests for an employee with an active FMLA case, use the FMLA Leave template. Next, select “FMLA Case” from the dropdown menu on the sixth field. Then, select the FMLA case number. This will ensure the hours are recorded on the FMLA case in TCP.

When the Leave Request is approved, and the leave transferred to the employee’s timesheet, **two time segment lines will be seen**: one recording the FMLA hours and one recording the leave type being used to pay the leave hours. Do not delete either segment – both are needed to process the FMLA leave appropriately.
Cancel an Employee Leave Request Job Aid

Timekeepers and managers can cancel a Leave Request in “Approved” status. If the Leave Request has not yet been approved and remains in “Pending” status, either the employee can delete their own request, or the manager can Deny the request.

**Note:** Calendar view will be used for the following steps, but these actions can be taken through List View also.

1. Click on Tools, then Requests. The Request Manager page will populate.
2. By default, requests for all employees will display. To limit the visible requests to one or certain employees, use the Employee Filter or the Position Filter.
3. Click on the request to be cancelled, click the Manage button, then select Cancel. Alternately, right-click on the request and select Cancel in the menu.
4. A window will pop-up asking if you are sure you want to cancel the request. Click OK to proceed.
5. A processing window will populate. Once the processing is complete, click the OK button. This process will cancel the Leave Request and remove the time segment from the employee’s Hours timesheet.
Vacation Requests from New Hires

Newly hired employees must have six months of continuous state employment before they can use vacation leave. TCP is not configured to monitor this conditional vacation usage and all accruals will begin at the date of hire, not the date of eligibility for use. TCP will not prevent an employee from submitting a vacation request.

It is the responsibility of the Department to ensure that, if an employee submits a Vacation Leave Request within their first six months of employment, the Leave Request is edited and changed to Leave without Pay.

1. Navigate to the pending leave in either Calendar or List view.
2. Access the request details by right-click on the request and select Detail. Alternatively, click the request and then click the Manage button, or double click on the request.
3. On the Employee Request Details page, click Edit.

4. Change the Leave Group drop-down to Leave Code

5. For the Leave Code, select 3-Leave without Pay.

6. For the Description, enter a note regarding the employee being within their first six months of employment.

7. Click Ok to update the request.

8. On the Employee Request Detail, with the changed Leave Code, click Save.

9. The processing window will display the completion rate. When complete, click the OK button.

10. The Leave Request will now be updated on the Request Manager page.

11. For managers, to approve the Leave without Pay entry, right-click on the amended Leave Request and select Approve Request Level 1.

12. The processing window will display the completion rate. When complete, click the OK button.
13. The Leave without Pay entry will now be seen on the Hours screen.

<table>
<thead>
<tr>
<th>Time In</th>
<th>Actual Time In</th>
<th>Time Out</th>
<th>Actual Time Out</th>
<th>Hours</th>
<th>Shift Total</th>
<th>Day Total</th>
<th>Week Total</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/3/2022 08:00 AM</td>
<td>5/3/2022 08:00 AM</td>
<td></td>
<td>&lt;&lt; Time sheet &gt;&gt;</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3 - Leave without Pay</td>
</tr>
</tbody>
</table>

**Viewing Employee Leave Accruals**

Timekeepers can view the leave balance accruals for employees on the Leave Request screen itself and from the Individual Hours screen.

1. If a manager is already reviewing a leave request, accrual balances can be viewed using the Accruals button on the Edit Employee Request screen.

2. Alternately, navigate to the Individual Hours screen and select the employee. (See the Individual Hours section for additional instruction). Click on the Accruals tab.

3. The Accruals page displays several columns.
   a. Accrual Bank – type of leave
   b. Accrued – amount accrued to-date
   c. Accrual Forecast – monthly accrual that will be earned
   d. Used – amount of leave used
   e. Used Forecast – any leave that has been approved but has not been through the close process to reconcile the total
   f. Expired – for straight comp, number of hours that have expired
   g. Expired Forecast – for straight comp, number of hours that will be expiring
h. Remaining – usable number of hours

**Vacation Requests from New Hires**

Newly hired employees must have six months of continuous state employment before they can use vacation leave. TCP is not configured to monitor this conditional vacation usage and all accruals will begin at the date of hire, not the date of eligibility for use. TCP will not prevent an employee from submitting a vacation request.

It is the responsibility of the Department to ensure that, if an employee submits a Vacation Leave Request within their first six months of employment, the Leave Request is edited and changed to Leave without Pay.

14. Navigate to the pending leave in either Calendar or List view.

15. Access the request details by right-click on the request and select Detail. Alternatively, click the request and then click the Manage button, or double click on the request.
16. On the Employee Request Details page, click Edit.

17. Change the Leave Group drop-down to Leave Code

18. For the Leave Code, select 3-Leave without Pay.

19. For the Description, enter a note regarding the employee being within their first six months of employment.

20. Click Ok to update the request.
21. On the Employee Request Detail, with the changed Leave Code, click Save.

22. The processing window will display the completion rate. When complete, click the OK button.

23. The Leave Request will now be updated on the Request Manager page.

24. To approve the Leave without Pay entry, right-click on the amended Leave Request and select Approve Request Level 1.

25. The processing window will display the completion rate. When complete, click the OK button.

26. The Leave without Pay entry will now be seen on the Hours screen.

**Monitoring Leave Accrual Balances**

As per HR policy, employees must work one day in the month for their vacation and sick accruals to be used. This means that an employee may not use the monthly accrual on the first day of that month (i.e. An employee cannot use the August Vacation accrual on August 1st. They may use any previously banked accrual for that day.)

Timekeepers and Managers are responsible for monitoring accrual balances to ensure that employees who submit vacation or sick leave requests for the first day(s) of a month have a
sufficient accrual balance prior to the accrual for that month. If it is found that an employee does not have a sufficient balance to cover the requested leave, action should be taken.

- If the insufficient balance is found prior to the employee taking the leave, the leave request should be canceled by the employee.
- If the insufficient balance is found after the employee takes the leave but prior to the manager approving the leave request, the manager should deny the leave request.
- If the insufficient balance is found after the employee takes the leave and the leave request has already been approved by the manager, please notify Payroll that the hours will need be corrected to “Unpaid” hours.

The Period Report titled “Accruals and Usage Report” in the Leave Management category can be run for the last day of the month and used to monitor the balances of employees who have requested leave for the first day(s) of the month.
Overtime Compensatory Time Payout

When a manager approves for overtime compensatory time to be paid to an employee in lieu of the hours being banked to take later, the Overtime Comp Payout will need to be entered into TCP. Typically, Timekeepers will be responsible for entering the Payout into TCP.

**Note:** Please ensure the hours show as accrued for the employee before entering the Overtime Comp Payout. See the Viewing Employee Leave Accruals section for additional instruction.

1. Navigate to the employee’s hours using the Individual Hours screen. See the Individual Hours section for additional instruction.
2. Adjust the Start and Stop dates if necessary.
3. Click on the Add button.
4. Click the checkbox for Timesheet entry. This will allow you to enter a quantity of hours rather than an in and out time.
5. Enter the date and time in the fields for Time in. Ensure the entry is made on a date after the end of the FLSA week when the overtime being paid was earned.
6. Enter the quantity of Hours to be paid out.
7. Specify the position worked for this shift by clicking the Position drop-down and selecting Position 15-Overtime Comp Payout.
8. Enter a note for the added segment in the Note field. The note for Overtime Comp Payout entries should be include in the order below:
   a. The cost center or project on which the Overtime Comp Payout should be charged, if different from the default cost center. If OT Comp Payout is from the employee’s default cost center, input “same” in place of the cost center.
      i. Example: 123456
      ii. Example: Same

**Note:** Only use the cost center, project number or same in the notes. Do not add special characters or additional abbreviations.
9. Click Save.

10. The hours will now show on the Hours screen.

11. These hours will need to then be approved by the employee and the manager.

**On-Call Compensatory Time Entry**

Timekeepers and Managers will be responsible for entering On-Call hours for employees who work on-call. On-Call pay will be calculated as Straight Compensatory time in TCP and will be banked for future use or for Straight Compensatory Time payout (handled outside TCP on the Payment Voucher form).

**Note:** If the on-call comp time is to be paid-out, it must first be entered in the timesheet to generate the Straight Compensatory time that will be paid-out.

1. Navigate to the Individual Hours screen (Hours > Individual Hours) and select the employee.
2. Adjust the Start and Stop dates if necessary.

3. Click on the Add button.

4. Click the checkbox for Timesheet entry. This will allow you to enter a quantity of hours rather than an in and out time.

5. Enter the on-call date and time in the fields for Time in.

6. Enter the quantity of Hours to be recorded.

7. Specify the position worked for this shift by clicking the Position drop-down and selecting Position 13 – On-Call.

8. Click Save.

9. The on-call hours will now show on the Hours screen.
10. These hours will need to then be approved by the employee and the manager.

**Note:** If an employee is “called-in” they should still punch in and punch out, or, if an exempt employee, add the worked hours to their timesheet. There should be separate timesheet entries for the on-call pay and the physical on-call hours worked (if any).

### Reviewing Employee Attestations

The Employee Attestation is how A&P, Classified Exempt, and Faculty employees agree to their time’s accuracy. Since they do not perform clocking functions, employees with the classification of A&P, Classified Exempt, and Faculty are not required to approve their timesheet. Therefore, each month employees with these classifications will need to attest that “Yes, my time is correct. I have entered all leave time for the current month.” Or, if it is not correct, their leave will be entered. The Attestation in TCP appears once a day, upon the first login. Employees will need to attest that they have accurately represented their hours for the current pay period through today.

There are two ways a Timekeeper can validate an employee's attestation:

- Through the employee's profile (single employee)
- Running the Employee Attestation report (multiple employees)

### Employee Attestation in Employee Profile

As a Timekeeper, you can validate an employee's attestation within their profile, under the Personnel tab. This reflects the employee's last attestation response.

1. Go to Employee, then Employee Profiles.
2. 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.

3. Click on the Personnel tab and open the Attestation section.

A response of “Accepted” indicates that the employee attests that all hours and leave have been entered into TCP. A response of “Rejected” indicates that there are hours or leave requests to be entered and that the current timesheet is not complete.

**Employee Attestation Report**

The Attestation Report can be used to validate multiple employees' attestation.

1. Go to Reports, then Period Reports.
2. The Employee Attestations report can be found under the Miscellaneous category.
The report can be downloaded as an HTML file viewed on-screen or downloaded as a PDF or OpenXML document.

**Corrections to Payroll After Pay Period Locked**

Pay periods will be locked for entry in TCP based on the time entry deadline posted on the Payroll Services website. If an error is identified in an employee’s timesheet before it is submitted but after Payroll has locked the pay period, the timekeeper or manager should email Payroll Services (payroll@uta.edu).
If the hours were not entered into TCP, send a completed, signed paper timesheet (found on the Business Affairs Forms webpage) to Payroll Services.

If hours are in TCP but need to be changed, send an email to Payroll Services that includes all pertinent correction information, such as:

- Employee ID
- Employee Name
- Position ID
- Needed Correction
- Reason for Correction
- Manager Approval for Correction
- Departmental Contact

**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.

**Suggested Timekeeper Period Reports**

- Approaching Overtime (Payroll)
- Missing Manager Approval* (TimeKeeper/Manager)
- Accrual and Usage Report* (Leave Management)
- Employee Comp Time Hours* (TimeKeeper/Manager)
- Employee Attestations (Miscellaneous)
- Conflicting Segments* (TimeKeeper/Manager)
- Employee Absence Requests* (TimeKeeper/Manager)
- Employee In Out Early or In Out Late (TimeKeeper/Manager)
- Employee Missed Punched Report* (Timekeeper/Manager)
- Missing Employee Approvals (Timekeeper/Manager)

**Running a Report**

1. Click on Reports, then select Period Reports.
2. Select one of the report categories.
3. Select the report you’d like to run.

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.
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.

      b. For Position Filters, click the Enable Selection box.
         i. Chose to Include Selection or Exclude Selection
         ii. Select or search for the position(s) to include or exclude.
c. Click Filter to apply the filter

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. 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.
7. 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.

8. 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.

9. You can preview the report prior to downloading it using the Preview button. This will display the report on-screen.

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

Create a 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 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 change formatting options for the report (such as time format, date format, hour format, etc.), check the box for Save options, then click the Options button and set the desired options.

6. To choose specific employees to include in the report, check the box for Save employee filter, click Employee Filter, and set the filtering criteria.

7. 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.

8. To adjust any 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.

9. Click Save.
10. 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.

**Edit a Saved Report**

After creating a custom report, it may be necessary to run the report using different filters, i.e. for a different employee or position group, or with different settings or formatting options.
**Note:** *If the report is visible to other users, the report settings will be adjusted for all users.*

1. Click on the custom report to be edited.
2. Under the Manage Saved Report section on the right, click Edit.
3. To adjust the filters, first click the checkbox for the desired filter, then click the filter button.

4. The Filter screen will populate. Make the desired adjustments then click the Filter button to apply the update.
5. To adjust the report Options or Settings, click the appropriate button, make the needed changes, then click Save.

6. Once all Filter, Option, and Settings adjustments have been made, click the Save button to save the report changes.

7. Run the adjusted report by clicking the Download button and selecting the desired download option.

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 “Chose 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.

   ![Image of Excel selection in file open settings]

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”
   ![Smiley face]
3. Right click on the downloaded file and select “Open With”
4. Select Excel.

   ![Computer screenshot showing how to open file in 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.
d. 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.

**Employee Messaging**

As a timekeeper, you can send messages to employees via TCP messaging and email.

1. To send a message to an employee, from the TCP dashboard, click the message icon in the top right corner next to your name.

2. In the Messaging Center dialog box, click Compose Message.
3. In the Compose Message dialog box, select the recipients to send the message to by clicking the Select recipients button.

   a. By default, the “Select employees from list” radio button will be selected. This will allow you to scroll-through the list of employees or search for an employee using their employee ID number or name.
b. To apply Filters for employee selection, click the radio button for Select using filters.

   i. This will populate the screen where you can narrow the message recipients using filters for position, department, employee role (A&P, Classified Non-Exempt, etc.), along with others.

   ii. 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.

   iii. Click the Filter button to apply the filter to the message recipients.

Note: You will only be able to send messages to the employees in the departments to which you have access.
4. Select the recipients of the message and click Select Recipients.

5. In the empty message box, type the message you want to send to the employee(s).

6. By default, the checkbox for Send with TCP messaging is selected. This will send the message to the employee to be read on their TCP dashboard. You can choose to send this message only via email by unchecking this box.

   a. You can set a message start time by checking the box for Message Starts and entering a date and time.

   b. You can set a message expiration date/time by checking the box for Message Expires and entering a date and time.
c. If you do not set an expiration date/time, the message will persist (if it is sent via TCP messaging) and the employee will see the message every time they clock in until they mark the message as read.

d. You can choose whether an employee can mark the message as read by selecting/deselecting Can mark as read.

**Note:** If this box is unchecked so that an employee cannot mark a message as read, be sure to enter an expiration date and time so that the message will eventually no longer be displayed.

7. To send the message via email, check the box for Send email.

8. Once you have configured the message and are ready to send it, press Send. The message will be sent according to the options you have chosen. These options will be configured for each message you send.

**Note:** SMS settings are not configured — you cannot send messages via SMS text.
Additional Tools

Incomplete Clock Operation Audit Log

The Audit Log allows you to examine situations where employees have not completed a clock operation.

1. To access the Incomplete Clock Operation Audit Log, go to Tools > Other Tools > Audit Log.
2. In the Select Feature drop down, choose Incomplete Clock Operation Audit Log.
3. Set the date range for audits that you are reviewing and click Update.
4. By default, this feature will load all the incomplete clock operations that have been recorded on the present day. To view certain changes, use one of the following filters:
   a. Employee Filter to select which employees will appear.
   b. Advanced Filter to see incomplete operations from all features, or specific features.
5. This audit log will outline the employee, when the incomplete operation occurred, on what feature it occurred, why the clock operation was incomplete, at which step the clock operation was abandoned, the type of clock operation, and the location where the incomplete operation occurred.

Unresolved Punches

The Unresolved Punches function displays clock operations that were recorded on a clock or mobile device, but not recorded in the employee’s timecard. This is usually due to the device being offline, or in Fallback mode. Clocks and mobile devices will still record punch information if the network connection is down. When the device regains network connectivity, the punches are sent and stored in Unresolved Punches. TCP has been configured to automatically import these punches to the employee’s timecard, but certain circumstances can prevent this. If you have an employee who performed a clock operation but cannot find the punch, and there is no evidence of an incomplete clock operation, look in Unresolved Punches.

1. To access Unresolved Punches, go to Tools, then Other Tools, then Unresolved Punches.
2. Set the date range that you want to look for Unresolved Punches for and click Update.
3. Unresolved punches will display information such as the employee’s ID, their name, the operation that was recorded, the date and time that the unresolved punch occurred, the position that was used for the operation, the number of attempts that occurred for the operation, and the error that caused the unresolved punch.
4. If Unresolved Punches exist, submit a Service Now request to either have the punches loaded in employees’ timesheets or, if they have already been manually deleted, to have the unresolved punches deleted.