



Export

EXPORT ☆ Options ?

Employee Information ▼

Header Add Fields

Format: Delimited (COMMA) Save

Employee Filter Job Code Filter

Preview Clear Generate

Header [TEXT:Employee Addresses]

Body

[NUMBER, 10], [DEPARTMENT, 30], [FIRSTNAME, 30], [LASTNAME, 30], [ADDRESS1, 50], [ADDRESS2, 50], [CITY, 30], [STATE, 30], [ZIP, 30]

Footer Add Fields

The **Export** feature allows you to export information (such as employee information or segments worked) for other software or for simple record keeping. The export is customized and generated as a plain text file with commas separating the different fields.

Exportable Information

- **Contract Information:** This exports a list of days and hours that have been applied to any Employee Contracts.
- **Cost Code List:** This exports a list of cost codes and cost code settings.
- **Employee Accruals:** This exports the employees' accrual information, such as hours used and remaining.
- **Employee Cost Code Groups:** This exports a list of Cost Code Groups that have been applied to employees.
- **Employee Information:** This exports a list of employees, their personal information, and some of their settings.
- **Employee Job Code Information:** This exports a list of job codes assigned to employees, as well as the employees' individual settings per job code.
- **Employee Occurrences:** This exports employees' occurrence information.
- **Employee Qualifications:** This exports a list of qualifications added to employees, including when the qualification starts and expires.

Export Essentials

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- **Employee Recurring Schedules:** This exports a list of which recurring schedules are assigned to employees, as well as when the recurring schedules begin and end.
- **Employee Role Cost Code Groups:** This exports a list of cost code groups that have been assigned to employee roles.
- **Employee Role Job Codes:** Just like employee job code information, an employee role's job codes can be exported.
- **Employee Roles:** This exports employee role information, similar to an employee information export.
- **Employee Segments:** This exports complete employee segments and any applicable rate or approval information.
- **Fingerprint - Digital Persona (Terminal):** If you use an RDTg with Fingerprint, this exports the encrypted fingerprint data for users and employees.

NOTE: Employee and user fingerprint images are not stored within TimeClock Plus® or on the device(s) themselves. Our biometric devices measure the minutiae points (ridges and valleys) contained in fingerprints, then uses an algorithm to create data that the TimeClock Plus software can read in order to identify employees and users. Outside of TimeClock Plus, that data is simply a string of numbers that cannot be used to identify a person by any means.

- **Job Code Cost Code Group:** This exports a list of job codes and the cost code groups that are assigned to them.
- **Job Code List:** This exports job codes, as well as job code settings, from Job Codes.
- **Labor Cost Sales Information:** This exports saved sales information from Labor Cost.
- **Location:** This allows you to define a physical address, phone numbers, and an email address for Locations.
- **Master Shifts:** This exports a list of Master Shifts.
- **Positions:** This exports a list of Positions, including whether or not the positions are active.
- **Qualifications:** This exports a list of Qualifications, including whether or not the qualifications are active.
- **Rate Change History:** This exports raises or other changes in the employees' rates of pay, including the rates' effective dates.
- **Recurring Schedules:** This exports a list of Recurring Schedules.
- **Master Schedules:** This exports any master schedules created in Master Schedule.



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- **Recurring Schedules Segments:** This exports information on individual days contained within recurring schedules.
- **Schedules:** This exports scheduled segments for employees.
- **User Cost Code Access:** This exports a list of users and their assigned cost code groups.
- **User Employee Access Filter:** This exports a list of users and the employee filters that assign them employee access.
- **Users:** This exports users and user settings.

Exporting Information

1. In TimeClock Manager, browse to **Tools > Export**.
2. Select the type of information you would like to export from the drop down menu in the upper left corner of the screen.

Configure Export Field

Group Other

Field Name TEXT - Text field

Text AppendTab

Cancel Save

3. If you would like to customize a header for the export, click **Add Fields** under **Header**. Then click on the icon to customize the text, or the icon to remove it.





Select Export Fields ?

Show non-importable fields

Showing 10 of 16

Field Name	Description	Group
NUMBER	Employee Id	Info
ACCRUALBANK	Accrual Bank Id	Info
HRSACCRUED	Accrued Hours	Info
HRSOVER	Over Limit Hours	Info
MANUAL	Manual Entry	Info
NOTE	Note	Info
POSTDATE	Post Date	Info
HRSTAKEN	Used Hours	Info
TEXT	Text field	Other

4. To add fields to the body of the export file, select **Add Fields** under **Body**.
5. Click on the  icon next to a field to configure it, or the  icon to remove it.
6. If you want to create a blank line between each record, add the **New Line** field.
7. If you would like to include a footer, configure it in the same way that you configured the header.
8. If you would like to quickly build a header based off of the data contained in the Body section, click the **Build Header** button in the upper right.
9. Click **Save** if you would like to store this configuration for future use. The template can then be accessed again through the **Export Templates** menu.
10. Click **Generate** to create a copy of the export.
11. Click **Download** to save a local copy of the report in the selected format.

Automating Exports

If you have saved any export configurations, you can then configure the system to automatically email a saved export.

NOTE: Be sure to enable Mail Settings so that the automation can properly send emails.

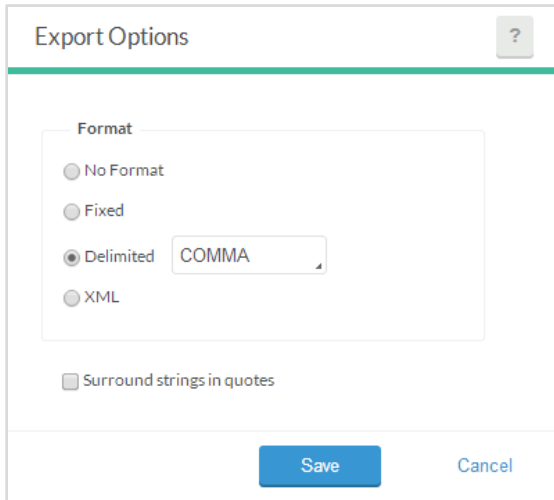
1. Choose the **Export Type**.



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2. If there are saved export configurations for this export type, you should see a gray **Automations** button. Click this button.
3. In the Export Automation window, choose the template that you wish to automate.
4. Click **Add** to open an **Export Automation** window.
 - a. Create a **Description** for the automated report.
 - b. Select the **User to run automation**. The export will run with the permissions of this user. You can also place a check next to **Run as multiple users** if multiple users are needed.
 - c. Choose whether or not you want the automation to be **Active** by toggling that checkbox.
 - d. Select a **Reporting Period**. This is the range of dates the report will run for. The different Reporting Periods that can be selected are:
 - **Fixed Period**: The report will always run between the two selected dates.
 - **Fixed to today**: The report will always run from the selected date to the current date at the time of automation.
 - **Fixed to yesterday**: The report will always run from the selected date to the day before the automation is run.
 - **Floating period**: The report will run using a defined period from the **Period** dropdown. This range can be modified by changing the **Period** start and stop offset times to go forward or back several days.
 - e. Click **Next** to view the **Output Options**. Select whether you would like to **Upload output to FTP** that contains all information, or **Generate personalized reports for each employee included** (each report will be rendered separately). Additionally, pick at least one type of output from the **Output Formats** column.
 - f. If you would like the report to be sent even when there is no relevant information, check **Generate output even if there is no data to include**. If the report generates exceptions and you would like to view them, check **Include exception log with output**.
 - g. To generate a special SQL package that contains the desired information contained in the export, place a check next to **Generate SQL package**.
 - h. Click **Next** to access the list of **Mailing Recipients**. Here you can enter in a list of email addresses you would like to have the report sent to. If you are logged in as a non-ADMIN user and would like to receive the report, check **Include the user that runs automation as a recipient**. If you would like to send an SMS message informing an individual of the automation, check **Add as SMS address** when entering the address.

Configuring Export Options



1. Click on the **Options** button in the top right corner.
2. Select the format from **Fixed**, **Delimited**, or **XML**.
3. If the **Delimited** format is active, select the type of delimiter you would like to use from the drop down. By default, the export will use a **comma** delimiter.
4. If the **Delimited** format is active and you would like fields to be in quotation marks, check **Surround strings in quotes** below the format.
5. Click **Save** to commit your changes.

For assistance please call Customer Support at: (325) 223-9300
Or visit us at: Support.TimeClockPlus.com

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