Period Reports Essentials

The **Period Reports** screen is where you can create, customize, print, and save reports on your employee hours. These reports can be customized to show information on select employees, and can be printed and/or downloaded in **HTML**, **PDF**, or **OpenXML** formats.

Configuring and Running a Report

1. Select the report you'd like to run from the **Period Reports** screen (**Hours > Period Reports**).
2. Apply any desired **Employee** and **Job Code Filters** by clicking the respective buttons at the top of the screen.
3. Enter in the date range for the report, or select a pre-defined date range from the drop-down.
4. Click on **Settings** to change individual facets of the report. These settings are unique to each report. For example, if you want to remove employee social security numbers from the **Complete Payroll Report** you would uncheck "**Print social security number at top of page**" in the **Settings** menu.
5. If you would like to change the font, spacing, or page orientation used on the report, click on **Page Layout** at the bottom of **Settings**.
6. If you have customized the report, click **Save** to commit these changes and return to the **Period Reports** screen.
7. Click **Preview** to see an example report and make sure that it includes all of your criteria.
8. Click on the **Download** button to choose which output format you would like to download. TimeClock Plus® produces three types of output:
   - **HTML**: The output is produced in a .html file that can be opened by a web browser.
   - **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.
   - **OpenXML**: The report is produced in a .xml file that can be opened in Microsoft Excel or OpenOffice Calc.

Automating Reports

When a user is saving a report or editing a report that has already been saved, they can set it up to be sent out using automations. To do so:

1. When adding or editing a saved report, click **Add** under the **Report Automation** header.
2. Create a **Description** for the automated report.
3. Select the **User to run automation**. The report will be ran with the permissions of this user.
4. Choose whether or not you want the automation to be **Active** by toggling that checkbox.

5. 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.

6. Click **Next** to view the **Output Options**. Select whether you would like to **Generate a single report** 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.
7. 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**.
8. 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.

TIP: A properly entered SMS address will usually resemble an email address, and typically includes the recipient's 10 digit phone number, followed by the @ sign and the service provider's domain name. Check with the recipient's service provider to verify the correct sequence before entering this information into the system.

9. Click **Next** to edit the body of the email. This is a brief message that will be sent along with the reports. If left blank, just the reports will be sent.
10. Click **Next** to schedule when the report is sent. Click on the **Add** button to create a new rule, or the icon to edit an existing rule. In the Task Scheduling wizard, set when you would like to **Execute** the rule.
11. Click **Save** to commit the task, and **Finish** to save the report.

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