

## Steps to Set Up 20 Hour Summary Report

Purpose of Report: To receive a daily report generated and emailed each morning to help track hours worked by employees restricted by Visa status to no more than 20 hours per week.

1. From the REPORTS menu, choose Period REPORTS...
2. Click “Payroll Summary” under Select a Report column.
3. Click “CREATE SAVED REPORT”
4. Select “Miscellaneous” in the Category box.
5. Enter “20 Hour Summary” in the Report Title box.
6. From the Filters , choose the accessibility and parameters of this report.
  - **Do not check the MAKE REPORT VISIBLE TO ALL USERS option. Leave option unchecked. (If this is checked any user in the system can change your created report)**
  - Enable option to SAVE OPTIONS. Click Options button. Make fields look like picture below.

Options ? Feedback

[Expand all](#) [Collapse all](#)

**Formatting Options**

Time format: Company Default

Date format: Company Default

Hour format: Company Default Decimal places: 2

Name format: Full name (John Smith)

Normalize employee names to same case

Normalize job code names to same case

\* Some reports will display a short year or no year to conserve space

**Miscellaneous**

First sort key: ID Number

Second sort key: None

Third sort key: None

Default reporting period: This Week

**Print Options**

Hide overtime 1 column if not present on report

Hide overtime 2 column if not present on report

Use bold printing to emphasize totals

Report line spacing (0.8-3.0)

Shading color for shaded sections on reports

Cancel

- Click Save
- Check box next to Save employee filter.

Saved Report ? Feedback

Base report name: Approaching Exception

Category:

Report title:

**Filters**

<input type="checkbox"/> Make report visible to all users	<input checked="" type="checkbox"/> Save employee filter <input type="button" value="Employee Filter"/>
<input checked="" type="checkbox"/> Save options <input type="button" value="Options"/>	<input type="checkbox"/> Save job code filter <input type="button" value="Job Code Filter"/>
	<input type="checkbox"/> Save cost code filter <input type="button" value="Cost Code Filter"/>

**+ Report Automation**

Cancel

- Click Employee Filter button.
- Uncheck Employee Status.
- Check Custom Fields.
- Click the green +Add button. In Custom Field box, choose “20 Hour Limit”. In Value field, choose “Y”. Click Save.

The screenshot shows a dialog box titled "Add Custom Field". At the top right of the dialog, there is a question mark icon and a "Feedback" button. The main content area contains the following fields:

- An "Include" dropdown menu.
- A "Custom Field" dropdown menu with the value "20 Hour Limit".
- A "Condition" dropdown menu with the value "Equals".
- A "Value" dropdown menu with the value "Y".

At the bottom right of the dialog, there are two buttons: "Cancel" and "Save". The "Save" button is highlighted in blue.

- Click Filter button.

7. Click Settings and make settings match picture below.

20 Hour Summary

Report title 20 hour Summary

- Print employee number
- Print employee export code
- Print employee social security number
- Print tracked field 1 - "Track1"
- Print tracked field 2 - "Track2"
- Print tracked field 3 - "Track3"
- Print control total at bottom of report
- Print a divider line between employee records
- Print employee even when there are no records
- Print signature line for each employee

- Include summary of each week of data
- Split by cost code (when applicable)
- Split by rate of pay
- Split by job code
- Print job code description
- Skip a line between each employee
- Force new page when primary sort key changes
- Subtotal on primary sort key
- Include detail in subtotal

Default Page Layout Cancel Save

- Click Save
8. Click green + next to Report Automation
- Click the green + Add button
  - Enter "Approaching OT" in Description field.
  - Your information will automatically be entered in the "Created by" and "User to run automation" fields – Do Not Change These Fields
  - Change Reporting Period to "Floating Period"
  - Change Period to "TimeClock Week"
  - Period Start Offset and Period Stop Offset should be Plus in drop down box and 0 days.

Report Automation ? Feedback

### General

Description   Active

Created by ANNIEC

User to run automation   Run as multiple users

Send report(s) from a specific email address

Send as name

Email address

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Reporting period  ?

Period

Period start offset   days

Period stop offset   days

Cancel Next

Enter a unique name and configure the reporting period to run when the report is automated

- Click Next.
- Make Output Options look like picture below.

Report Automation ? Feedback

### Output Options

Generate a single report that contains all employee information

Generate a personalized report for each employee

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**Report Format**

PDF

HTML

OpenXML

**Notification Settings**

Generate notification even when no data is found ?

Create exception log with export ?

Back Cancel Finish Next

Customize the output of the automation

- Click Next.
- Under Message Recipients, enter the email(s) to receive the automated report. Enter each email address individual and click the blue Add button after each one.

Report Automation ? Feedback

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### Message Recipients

Add  Add as SMS address

Delete	Address Type	Recipient
✖	Email	jluucas@vt.edu

Include the user that runs automation in email recipient list

Back
Cancel
Finish
Next

Configure the list of recipients to receive the report

- Click Next
- For Email Content, type “20 Hour Summary Report” in the Email Body field.
- Click Next
- For Task Scheduling, click on the pencil icon to edit.
  - i. Select Daily in the Execute field.
  - ii. From will be today’s date (Do not check the box after “to”)
  - iii. Select 7:00am in the time field
  - iv. Make sure all the days are checked under Days to include
- Click Save
- Click Finish
- Click Save

The report has now been created. To find the created report, select Miscellaneous from Categories on the Period Reports menu. The report will be listed in the Select a Report list. This report can be run anytime by clicking the blue Download button, if needed. Otherwise, each morning around 7am the system will automatically generate the report and email the report to each of the recipients you entered in Message Recipients.

To Edit the Report:

Highlight/Click the Report under Select a Report.

Click the gray Edit button under Manage Saved Report.