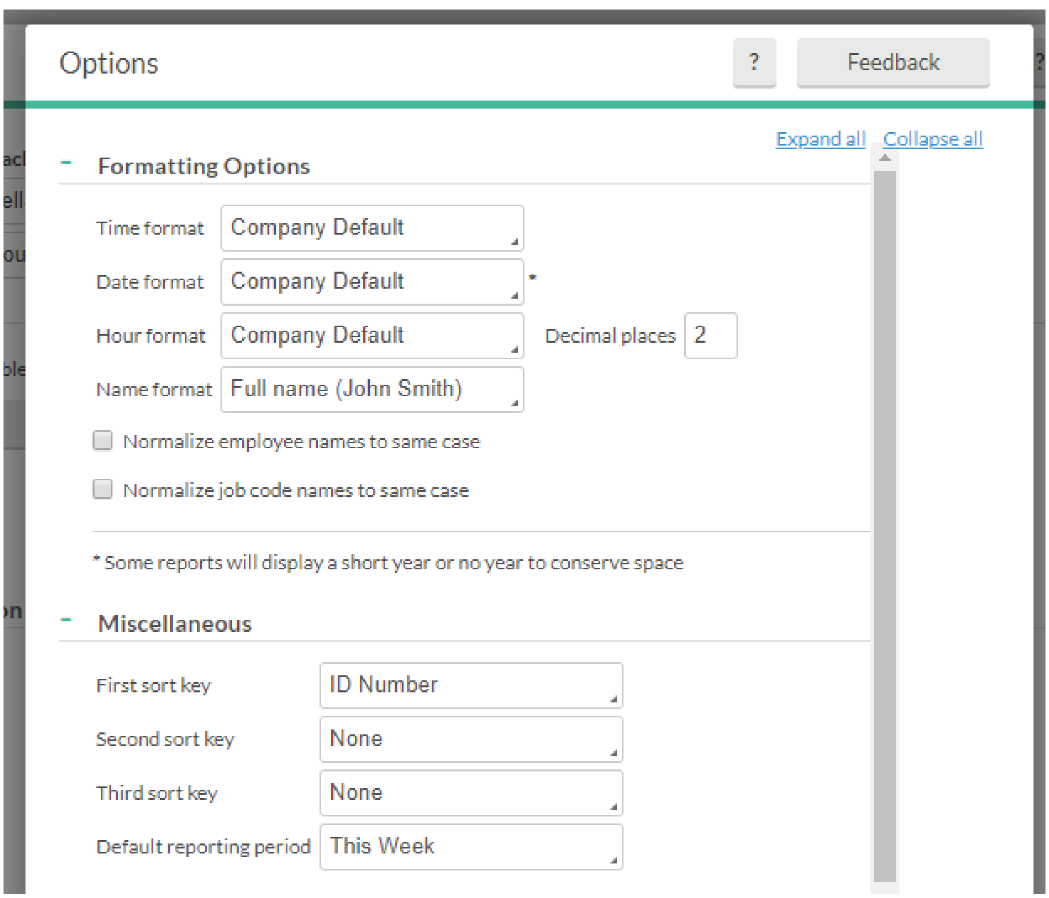
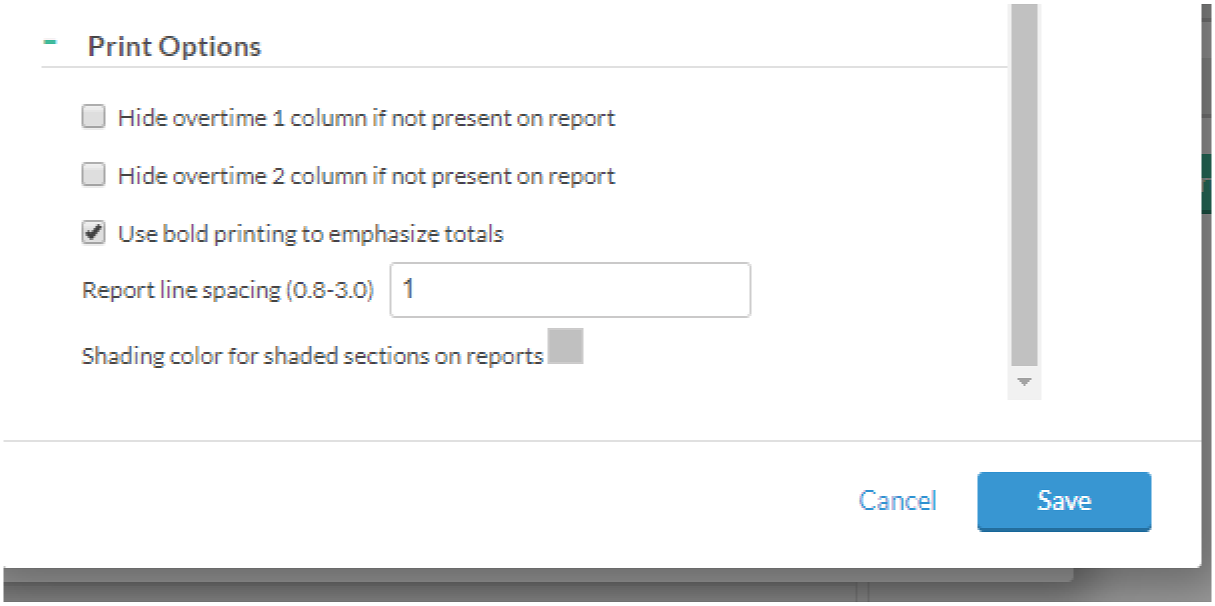
Steps to Set Up 20 Hour Summary Report

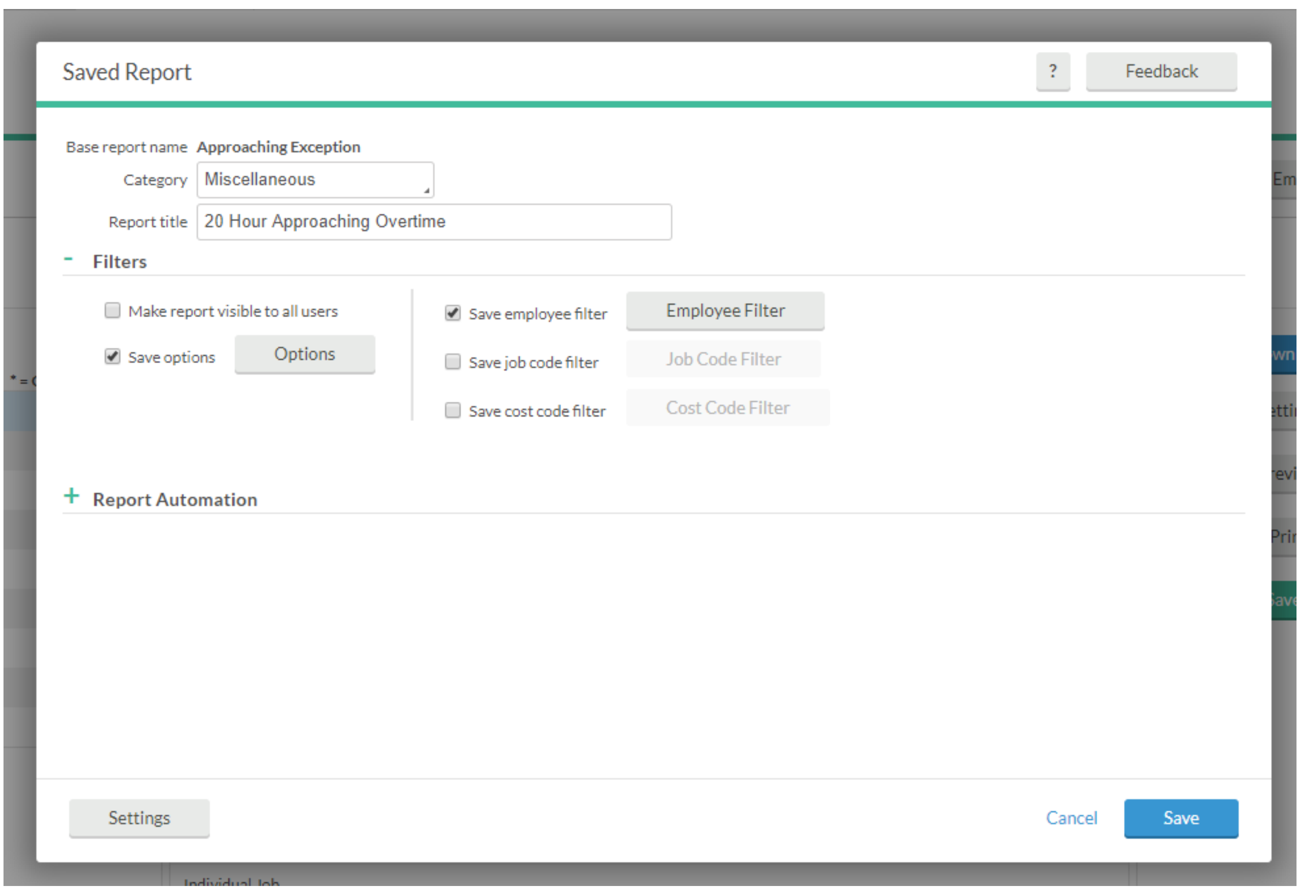
Purpose of Report: To receive a daily report generated and emailed each morning to help track hours worked by employees restricted by Visa status to no more than 20 hours per week.

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.

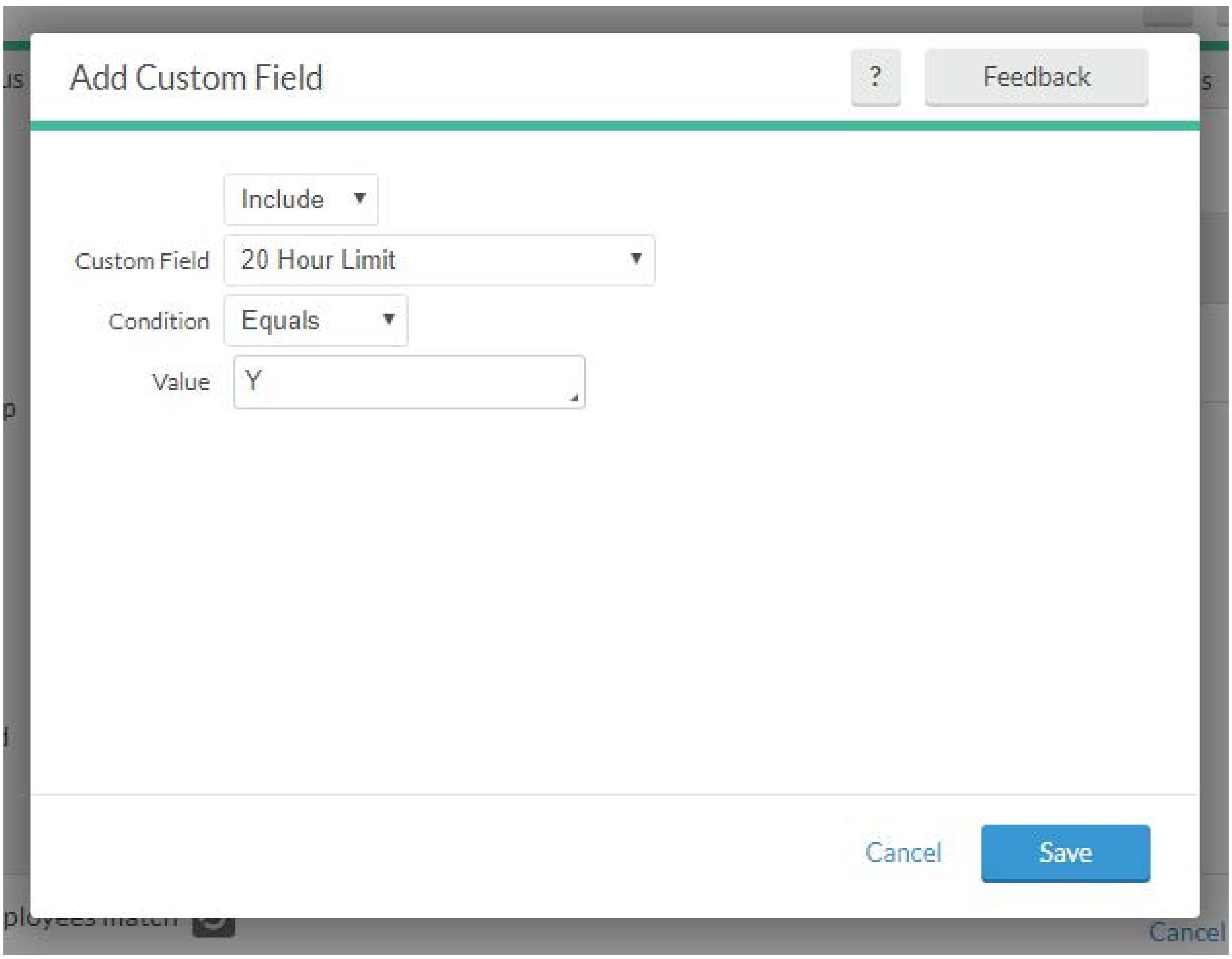




- Click Save
- Check box next to Save employee filter.

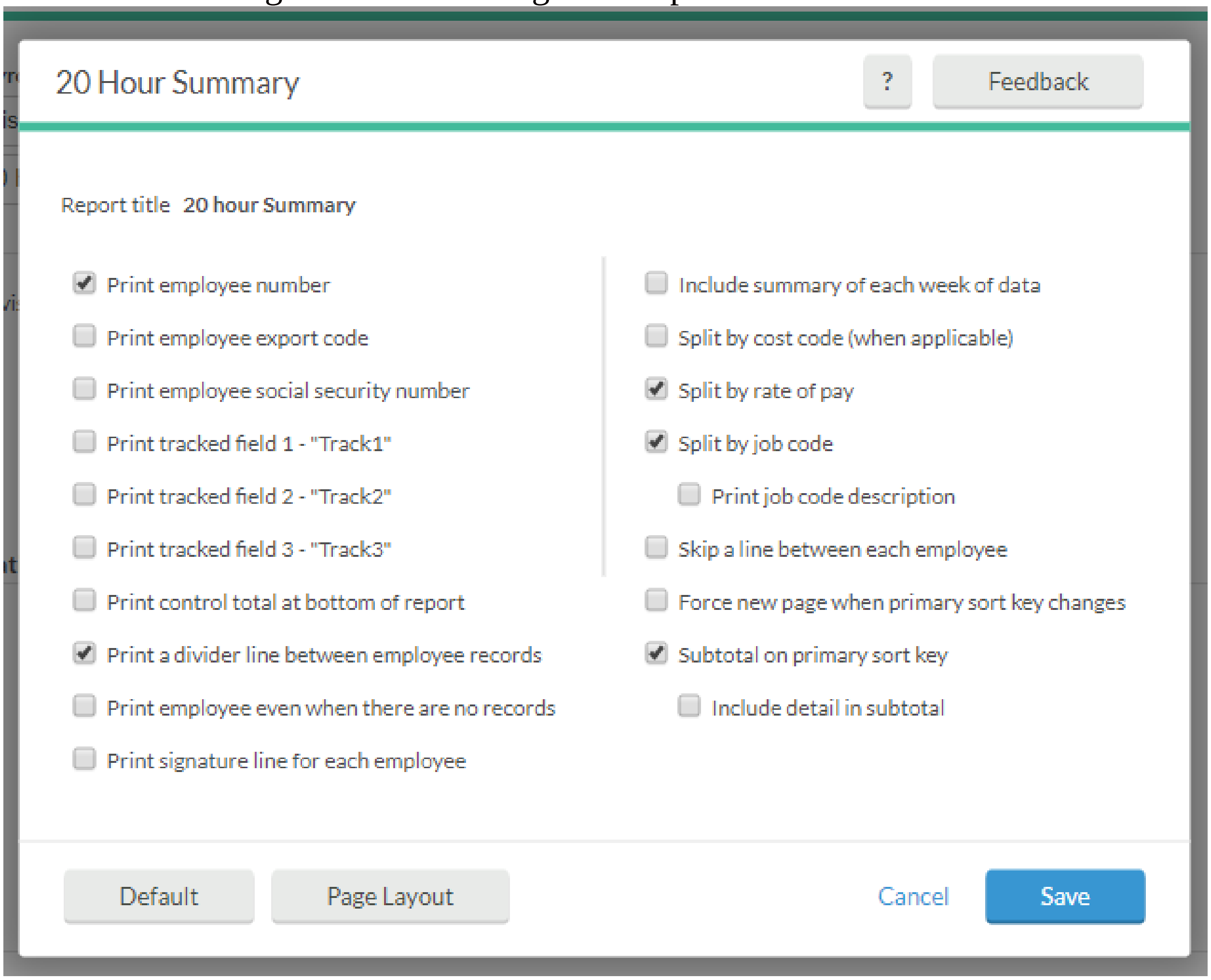


- Click Employee Filter button.
- Uncheck Employee Status.
- Check Custom Fields.
- Click the green +Add button. In Custom Field box, choose "20 Hour Limit". In Value field, choose "Y". Click Save.



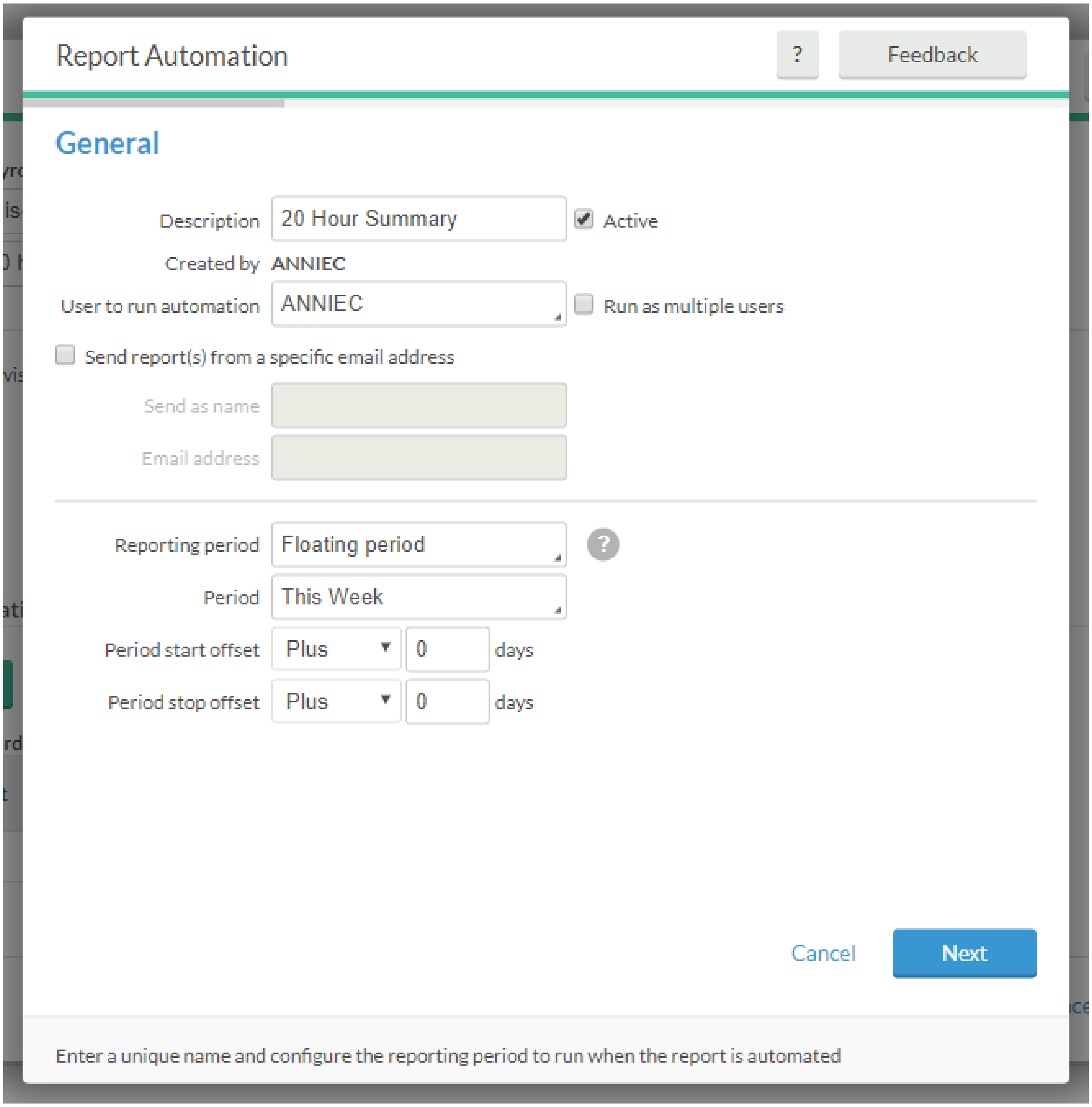
- Click Filter button.

7. Click Settings and make settings match picture below.

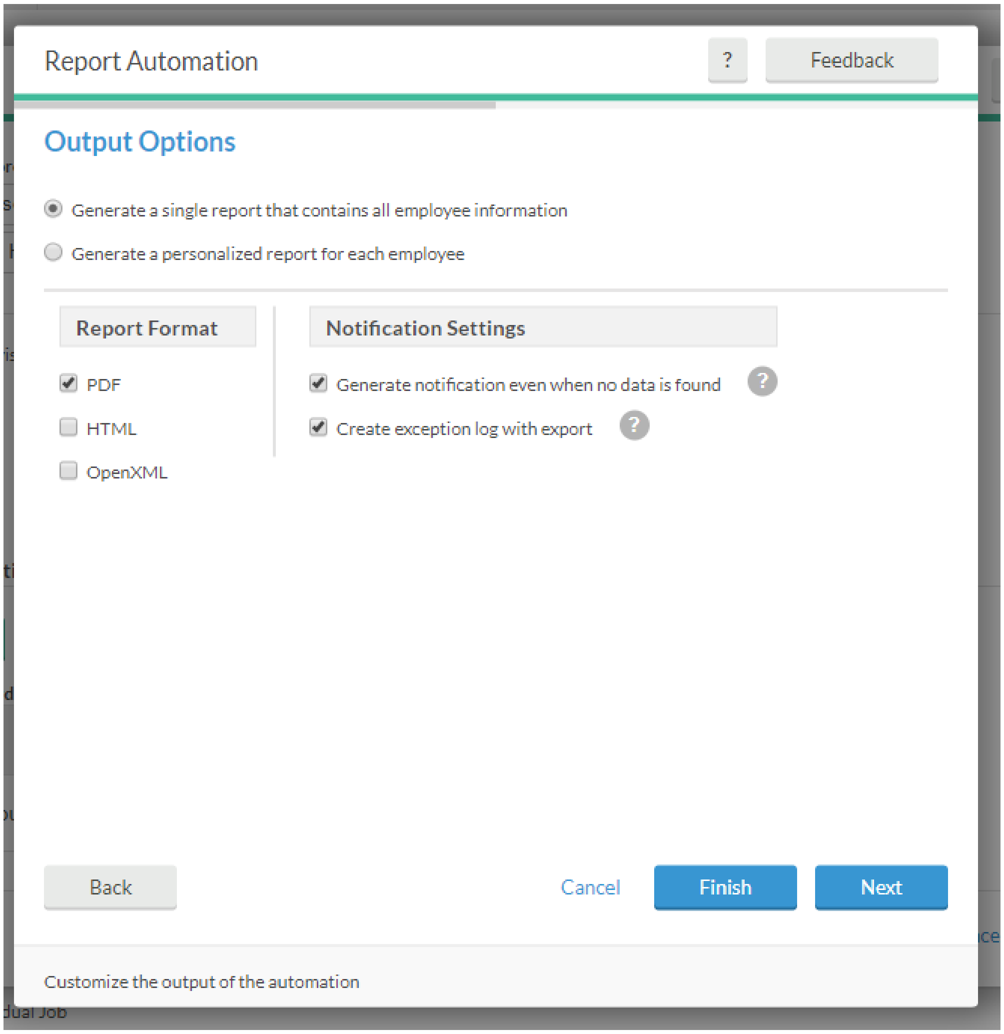


- Click Save

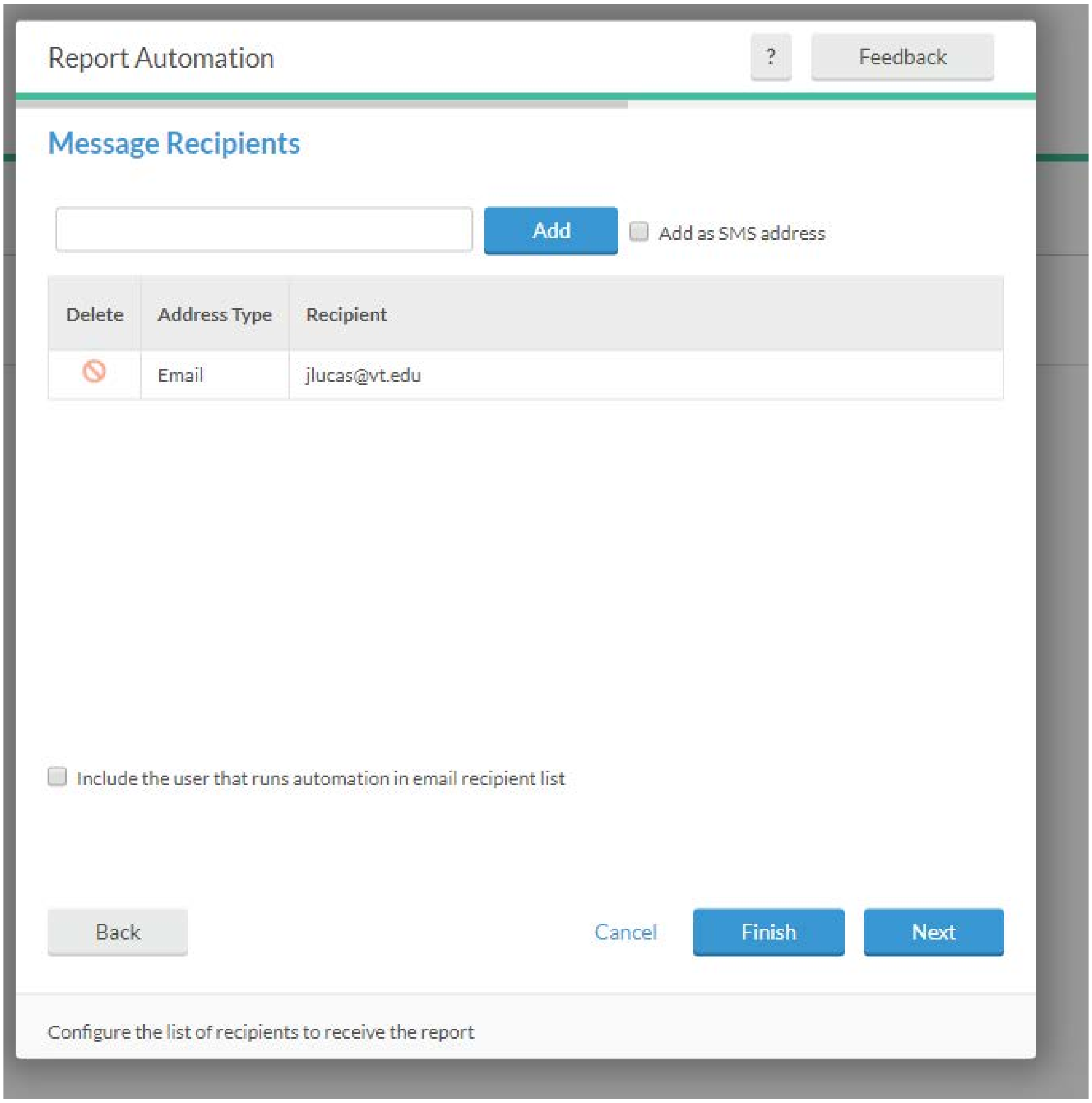
8. Click green + next to Report Automation
   - Click the green + Add button
   - Enter "Approaching OT" in Description field.
   - Your information will automatically be entered in the "Created by" and "User to run automation" fields – Do Not Change These Fields
   - Change Reporting Period to "Floating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



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



- 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.



- 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.