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TRAINING GUIDE

# Level 1 Reports

How to find a ready-made report, choose its dates, people and options, run it, open the result, and schedule it to run and share itself in timeware® HRMS.

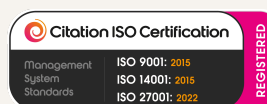
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| PRODUCT        | REFERENCE | VERSION |
|----------------|-----------|---------|
| timeware® HRMS | t2-1020   | v1.0    |

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**timeware UK Ltd**

3 Fieldhouse Road, Rochdale, Greater Manchester, OL12 0AD  
+44 (0)1706 659368 · sales@timeware.co.uk · timeware.co.uk



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# What this covers

This guide covers Reports in the web version of timeware HRMS: the page where people turn the company's data into a spreadsheet or document. By the end you will be able to:

- find a report in the library and add it to your own list
- choose the dates, the people and the options a report covers
- run a report, follow its progress, and open or save the finished file
- explain which file formats a report can produce
- forward a finished report to colleagues
- schedule a report to run by itself and send itself to people
- favourite, change, copy and delete your saved reports.

Designing what goes into a report, such as its columns, sort order and page layout, is not covered here.

## Why it matters

Customers use reports to answer everyday questions on paper or in Excel: who works at each site, what leave was booked last month, which timesheets had problems this pay period. Payroll, HR and managers often need the same report every week or month.

Reports makes this repeatable. Each person keeps their own list of reports set up the way they like. They can run one with a single click, or let it run on a schedule and land in their colleagues' lists. Every report follows the same permissions as the rest of the product, so people only get data they are already allowed to see.

# Key terms

| TERM                      | WHAT IT MEANS                                                                                                                                                                       |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Report template</b>    | A ready-made report supplied with the product, such as <b>Essential Details Listing</b> or <b>Leave Entry Listing</b> . You choose one in the <b>Select Report Template</b> window. |
| <b>Report</b>             | Your own saved copy of a template, with your choice of name, dates, people and options. It appears under <b>Chosen reports</b> .                                                    |
| <b>Chosen reports</b>     | The list of your saved reports, on the left of the Reports page. Each person has their own list.                                                                                    |
| <b>Run (generate)</b>     | Producing a file from a report with today's data. You start a run with a <b>Generate</b> button, or it starts by itself on a schedule.                                              |
| <b>Report History</b>     | The list of files your runs have produced, and files colleagues have forwarded to you, on the right of the Reports page.                                                            |
| <b>Date Range</b>         | The period a report covers, such as <b>Previous month</b> or <b>Current timesheet</b> . It is worked out again each time the report runs.                                           |
| <b>Employee Filter</b>    | Inside a report: which people it includes, for example one site or a few named people. On an application policy: which people its users can see at all.                             |
| <b>Occurrence</b>         | The part of a report that decides whether it runs by itself: <b>Never</b> , <b>Daily</b> or <b>Monthly</b> .                                                                        |
| <b>Recipients</b>         | Colleagues who get a copy of each scheduled run in their own Report History.                                                                                                        |
| <b>Forward</b>            | Sending a copy of one finished file to colleagues' Report History.                                                                                                                  |
| <b>Application policy</b> | A set of permissions given to users, sometimes called a role. A customer's administrator manages them under <b>Configuration &gt; Advanced &gt; Application policies</b> .          |

Table 1 — Key terms

# What permissions are required

Reports has no row of its own: anyone who can sign in to the web version can open it from the sidebar or the main menu. Which reports they get depends on the rows for each report's data, named exactly as in **Configuration > Advanced > Application policies**.

| TASK                                                                                                | APPLICATION POLICIES ROW                                                                                                                                     | SWITCH       |
|-----------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|
| See people reports, such as Essential Details Listing                                               | People > Person                                                                                                                                              | Read         |
| See people detail reports, such as Salary Listing or Grievance Listing                              | People > Person and the matching page, such as People > Person > Employment and compensation > Salaries or People > Person > Employee relations > Grievances | Read on both |
| See configuration listings, such as Department Listing                                              | The matching configuration row, such as People > Configuration > Departments                                                                                 | Read         |
| See Leave Entry Listing, Leave Day Listing, Leave Usage Summary or Return-to-Work Interview Listing | Leave > Leave planner                                                                                                                                        | Read         |
| See Leave Entitlement Adjustment Listing                                                            | Leave entitlement adjustments, under Leave > Leave planner                                                                                                   | Read         |
| See Leave Entitlement Summary Listing                                                               | [Check: which row grants this report.]                                                                                                                       | Read         |
| See timesheet and cost centre reports                                                               | Time > Timesheets                                                                                                                                            | Read         |
| See Timesheet Pay Element Listing                                                                   | Time > Timesheets and View cost under it                                                                                                                     | Read on both |
| Add, change, copy, schedule or delete their own reports                                             | None. These only touch the user's own reports.                                                                                                               | None         |
| Include particular people                                                                           | The Employee Filter on the user's policy must cover them.                                                                                                    | None         |
| Open a report a colleague forwarded                                                                 | The same rows as the report itself.                                                                                                                          | Read         |

Table 2 — Access needed for each task

#### NOTE

After an administrator changes an application policy, the user should click **Log out** and sign back in. Until they do, the report library can still reflect the old permissions.

Reports made just for one company are not a policy row. They must be on the company's Subscription, where they are listed under **Reports**.

#### RUNNING REPORTS

## How it works: Reports

A report starts life as a template in the library. You add it to **Chosen reports**, which saves your own copy with your choices. From then on you run it whenever you like, and each run adds a file to **Report History**.

Runs happen in the background. You can carry on working on any page. When the file is ready, a message pops up wherever you are.

### The Reports page

Open it from **Reports** in the sidebar, or from the main menu. The first time, the page is empty and says **No reports found** and **Add your first report**, with an **Add Report** button. Once you have reports, the page has two halves:

- **Chosen reports** on the left: your saved reports, grouped by area (**People, Leave, Time, Advanced**), each with **Name**, **Last Run** and **Actions**. A **Next Occurrence** column appears once any report is scheduled.
- **Report History** on the right: the files your runs produced, newest first, with **Format**, **Name**, **Added On**, **Status** and **Actions**.

A search box at the top of the page filters both halves by report name. The **Refresh** button beside the heading reloads both lists. Pointing at a report's name shows the template it came from and a short description.



Figure 1 — The Reports page: Chosen reports on the left, Report History on the right

## Walkthrough: find a report and add it to your list

### 1 Click Add Report

It sits above **Chosen reports**, or in the middle of an empty page.

**You see:** the **Select Report Template** window. Templates are grouped by area, with configuration listings in their own **Configuration** group. Each shows its name, a one-line description and a **Select** button.

### 2 Find the template you need

Scroll the groups, or type part of the name in the search box, for example “leave”.

**You see:** only the templates your permissions allow. If a template a customer expects is missing, check their policy first.

### 3 Click Select

Click **Select** beside the template, or double-click its row.

**You see:** a large window headed **Configure** and the template name. The **Name** box at the top already holds the template name. A menu down the left lists the sections this report has, starting with the first one.

### 4 Give it a clear name

Change the name to say what this copy is for, for example “Leave last month – Leeds”. Names can be up to 80 characters and must be different from your other reports.

### 5 Make it a favourite if you like

Click the star beside the name. Pointing at it says **Is marked as favourite**.

### 6 Choose its settings

Work through the sections described in the next walkthrough. You can leave any section as it is: every template comes with sensible defaults.

## 7 Click Create

**You see:** Report has been created successfully. The window closes and the report appears under **Chosen reports**. Clicking **Cancel** instead takes you back to the template list.

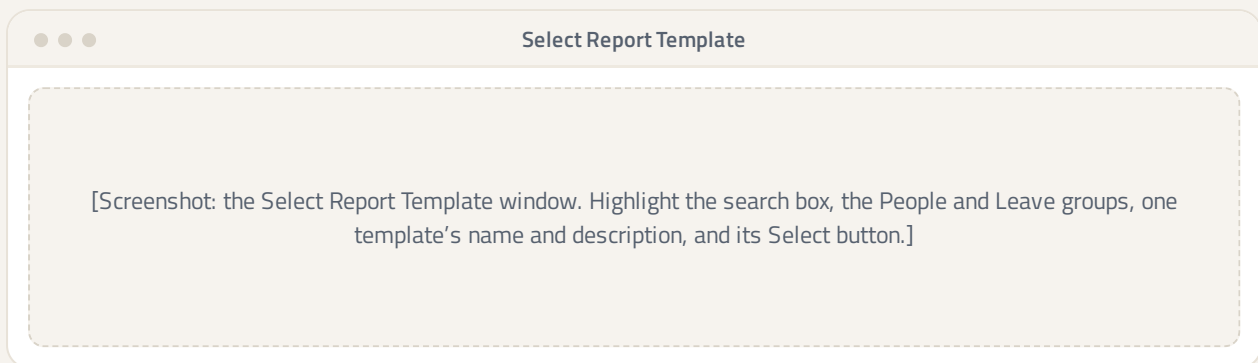


Figure 2 — Choosing a template from the library

## Walkthrough: choose dates, people and options

These sections sit in the menu on the left of the **Configure** window. Not every report has every section: a list of people has no **Date Range**, for example, and only some reports have **Options**.

### 1 Open Date Range

Click **Date Range** in the menu.

**You see:** Define the time frame for your report by setting up a date range. and a **Select range type** list.

### 2 Pick a range type

Open the list and choose one, such as **Previous month**. Each choice has a short description under its name. Table 3 lists them.

**You see:** a line such as **Report will run from 1 Aug 2026 to 31 Aug 2026**. This shows the dates for a run today. The range moves on by itself, so next month the same report covers the new previous month.

### 3 Fill in any extra box

For **Date range**, pick a from and to date. For a rolling range, type a **Rolling amount**: a minus number looks back, for example -7 with **Rolling day** for the last seven days. For **Timesheet containing date** or **Target entitlement period**, pick a date inside the period you want.

### 4 Open Employee Filter

Click **Employee Filter** in the menu.

**You see:** a panel that says **Unfiltered** and a count such as **250 of 250 people**. Unfiltered means everyone the user is allowed to see.

## 5 Choose the people

Click the panel. In the **Filter** window, choose a **Scope: Organisational units** (by department, site, group, job title and so on) or **Individuals** (pick people one at a time). You can also start from one of your saved filters with **Copy from saved filter**. The **Live preview** shows who matches.

## 6 Click Apply

**You see:** the panel now reads **Custom selection** with a new count, such as **42 of 250 people**. The report keeps a copy of these rules. Each run includes whoever matches the rules on that day.

## 7 Open Options, if the report has them

Click **Options**. These change how the report looks. Examples are **Show Comments** on people reports and **Display Hours and Minutes as Decimal** on time reports. Pick a value from each list.

## 8 Save your choices

Click **Create** for a new report, or **Update** when changing one.

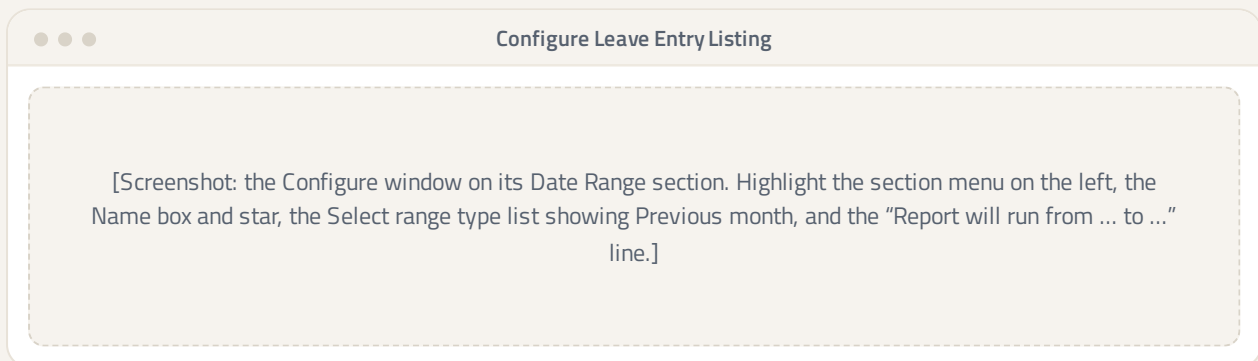


Figure 3 — Choosing a date range

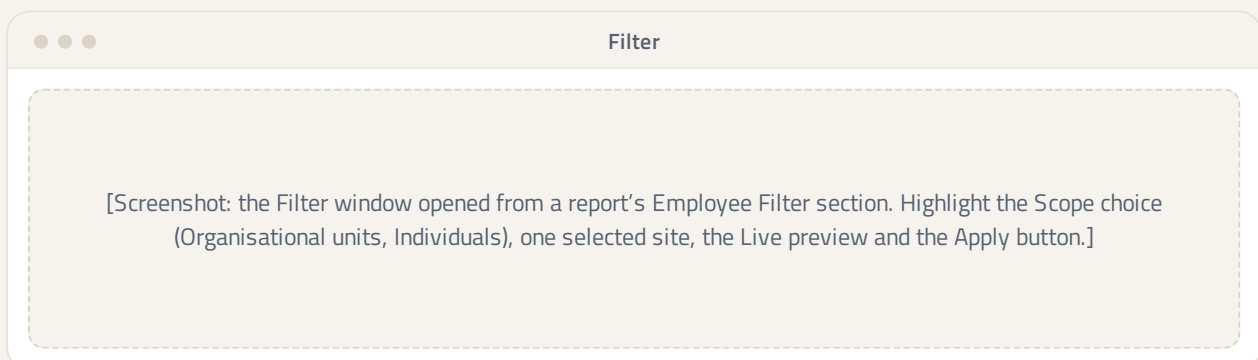


Figure 4 — Choosing which people a report includes

## Date range types

Each template offers the ranges that suit its data. Leave reports add entitlement periods, and timesheet reports add timesheet periods.

| RANGE TYPE                                     | WHAT THE REPORT COVERS                                                                           |
|------------------------------------------------|--------------------------------------------------------------------------------------------------|
| Today / Yesterday                              | That one day, from midnight to midnight.                                                         |
| Current month / Previous month                 | The 1st to the last day of this month, or of last month.                                         |
| Current year / Previous year                   | 1 January to 31 December of this year, or of last year.                                          |
| Date range                                     | Fixed from and to dates that you pick. These do not move on.                                     |
| Rolling day, week, month or year               | A number of days, weeks, months or years counted from today. Use a minus number to look back.    |
| Current timesheet / Previous timesheet         | Each person's own current or previous pay period, weekly, monthly and so on.                     |
| Timesheet containing date                      | Each person's pay period that contains the date you pick.                                        |
| Current, previous or target entitlement period | The leave year that contains today, the one before it, or the one that contains a date you pick. |

Table 3 — Date range types

## Walkthrough: run a report and open the file

### 1 Find the report

Look under **Chosen reports**, or type part of its name in the search box.

### 2 Click a Generate button

In the **Actions** column, each format the report offers has its own document icon with a small play symbol. Pointing at one shows, for example, **Generate XLSX**. Click it. Double-clicking the row does the same in the report's preferred format.

**You see: Report has been queued for generation. Last Run** updates, and a new row appears at the top of **Report History**.

### 3 Watch the status

The row's **Status** moves through **Pending**, **Queued**, **Initialising** and **Crafting...** to **Ready to view**. You do not need to stay on the page.

**You see:** a message, **Report 'Leave last month – Leeds' is ready to view.**, with **Open** and **Save** buttons. It stays until you close it.

### 4 Open or save the file

Click **Open** or **Save** in the message, or use the same buttons in the row's **Actions**. **Save** downloads the file. **Open** sends a spreadsheet to Excel on Windows, or downloads it elsewhere. A PDF or web page opens in a new browser tab.

**You see:** the status changes to **Viewed**, so you can tell which files you have already looked at.

### 5 Check how long it took, if asked

Point at **Ready to view** or **Viewed**.

**You see:** for example **Completed in 0m 12s** and **Completed on** with the date and time.

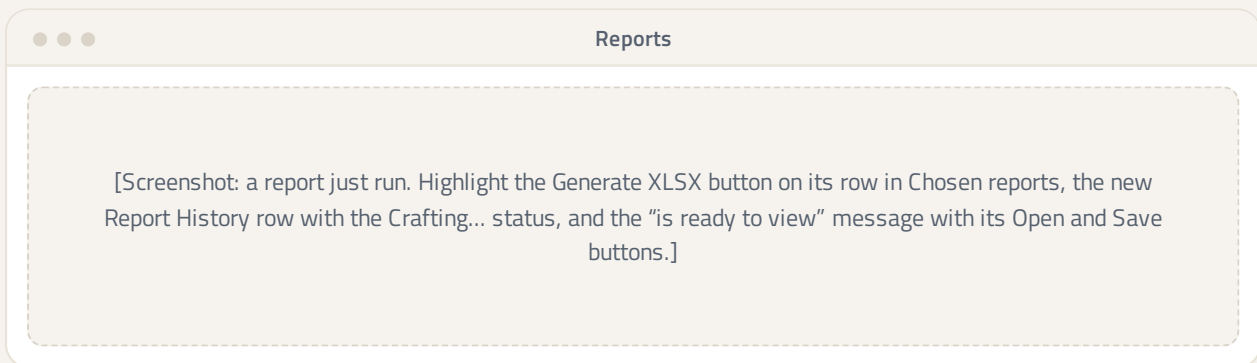


Figure 5 — Running a report and the message when it is ready

## Output formats

A report can produce any of four formats, and each one offered appears as its own **Generate** button:

- **XLSX:** an Excel spreadsheet. It is digitally signed, so people can check it came from timeware HRMS. It is the only format that can be password protected.
- **PDF:** a fixed document for printing or emailing.
- **CSV:** plain comma-separated values, for moving data into another system.
- **HTML:** a web page that opens in any browser.

The formats come from the template. [Check: every report template in the version checked offers XLSX only, so only the Generate XLSX button appears. Confirm when PDF, CSV and HTML buttons will be shown before training on them.]

## Walkthrough: forward a finished report

### 1 Find the file

In **Report History**, find a row that says **Ready to view** or **Viewed**.

### 2 Click Forward

It is the arrow in the row's **Actions**.

**You see:** a window headed **Forward** and the report name, saying **Select the people you would like to forward a copy of this report to.**

### 3 Choose the colleagues

Click **Select recipients...** and pick one or more users. You are not in the list, because the file is already yours.

### 4 Decide on an email

Switch on **Notify recipients via email** if they should get an email as well. The product remembers your choice for next time.

### 5 Click Forward

**You see:** **Report '...' has been queued for forwarding.** Each colleague gets a copy at the top of their own **Report History**, marked with an arrow. Pointing at it shows **Received from:** and your name.

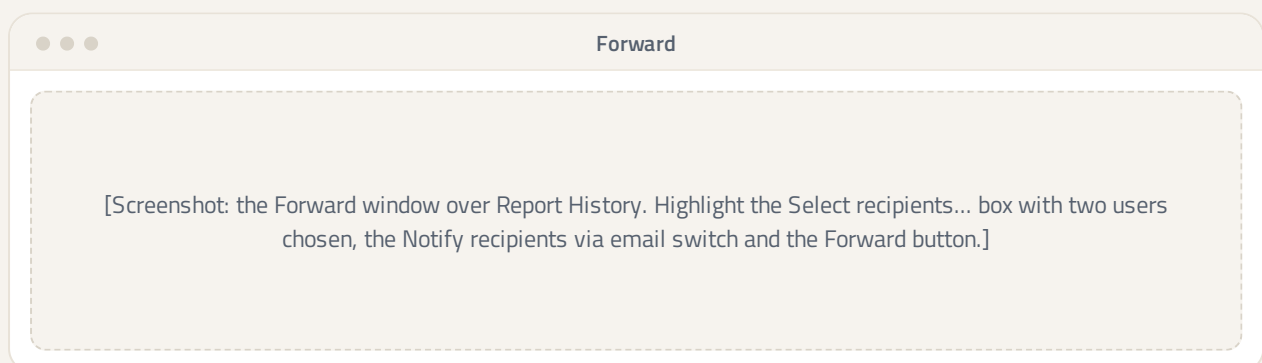


Figure 6 — Forwarding a finished report to colleagues

# Walkthrough: schedule a report and send it automatically

## 1 Open the report's settings

In **Chosen reports**, click **Configure** (the cog) on the report's row.

## 2 Open Occurrence

Click **Occurrence** in the menu.

**You see:** three choices, **Never**, **Daily** and **Monthly**. **Never** is selected and says **Run report manually**.

## 3 Choose Daily or Monthly

For **Daily**, tick the days it should run, **Mon** to **Sun**, and set the time after **at**. For **Monthly**, choose the day, from the 1st to the 28th, and the time.

## 4 Add recipients, if others need it

Click **Select recipients...** and pick the colleagues who should get each run. Switch on **Notify recipients via email** if they should get an email too.

## 5 Decide whether to email yourself

Switch on **Notify yourself via email** to get an email each time a scheduled run finishes.

## 6 Click Update

**You see:** **Report has been updated successfully**. The **Next Occurrence** column now shows when the report will next run. Pointing at it shows how long until then.

## 7 Stop the schedule when it is no longer needed

Open **Occurrence** again, choose **Never** and click **Update**.

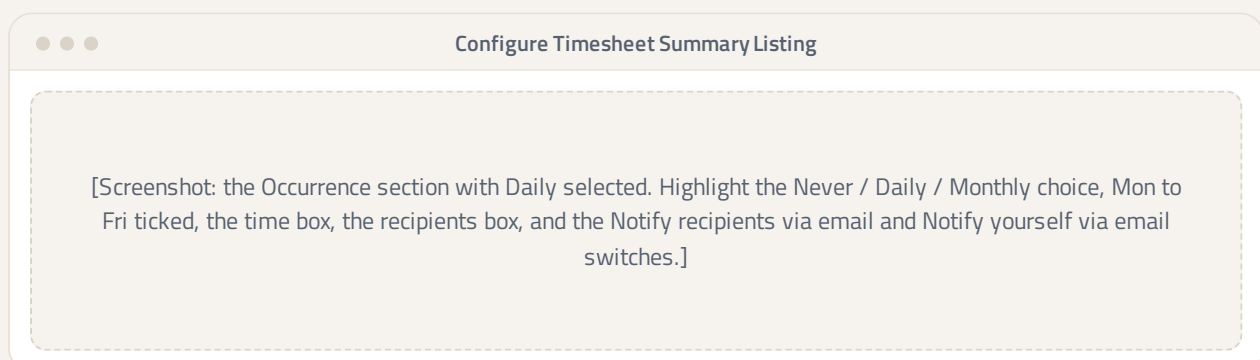


Figure 7 — Scheduling a report and choosing who receives it

## What the emails look like

The emails do not carry the file. **Your Report is Ready** goes to the owner, and **A Report Has Been Shared With You** goes to recipients. Each gives the file name and build date, and the second also names the sender. Each has a **View Report** button that opens the Reports page, where the file is waiting in Report History.

## Walkthrough: look after your saved reports

### 1 Favourite a report

Click the star in the row's **Actions**.

**You see: '...' is now marked as favourite.** and a star beside the report in both lists. Click again to remove it.

### 2 Change a report

Click **Configure** (the cog), change what you need, then click **Update**. Earlier files in Report History stay as they were.

### 3 Copy a report

Click **Copy**. The window says **You are making a copy of** and the report name. Type a new name and click **Copy**. This is a quick way to make, say, one version per site.

### 4 Delete a report you no longer need

Click **Delete** (the bin) on the row.

**You see: Wait a second!** and **You are about to permanently delete this report. This cannot be undone.**

### 5 Confirm

Click **Delete**. The report and any schedule it had are gone for good.

**You see: Report has been deleted successfully.**

### 6 Tidy Report History

Click **Delete** on a finished or failed file in **Report History** and confirm in the same way. Files still being made cannot be deleted.

# Limits at a glance

| WHAT                     | LIMIT             | NOTES                                                                                                                    |
|--------------------------|-------------------|--------------------------------------------------------------------------------------------------------------------------|
| Saved reports per person | 50                | At 50 the <b>Add Report</b> button is greyed out and says <b>You have reached the maximum allowed number of reports.</b> |
| Files in Report History  | 150               | The newest 150 finished or failed files are kept. Older ones drop off as new runs arrive.                                |
| Report name              | 80 characters     | Must be different from your other report names                                                                           |
| Runs you can start       | About 10 a minute | Faster than that is refused until a moment has passed                                                                    |
| Monthly schedule         | 1st to 28th       | So the report runs every month, including February                                                                       |
| Daily schedule           | At least one day  | Otherwise saving shows <b>At least one day must be selected.</b>                                                         |

Table 4 — Limits at a glance

## How it connects to other features

- **Application policies:** the Read rows decide which templates each user sees, and the policy's Employee Filter decides which people any report can include.
- **People, Leave planner and Timesheets:** reports read the same live data these pages show. A change made on a record appears in the next run.
- **Saved filters:** filters you have saved elsewhere in the product can be copied into a report with **Copy from saved filter**. Later changes to that saved filter do not change the report.
- **Users:** recipients and forwarding go to users of the web version, not to employees without a login.
- **Subscription:** reports made just for a company appear alongside the standard templates when they are on its Subscription.
- **Email:** scheduled runs and forwards can send emails that link back to the Reports page.

# Things to be aware of

- **Reports are personal.** Each person sees only their own saved reports and their own Report History. To share, forward a file or add recipients to a schedule.
- **Everyone gets their own numbers.** Two people running the same template can get different rows, because each run follows the runner's policy and Employee Filter.
- **Dates move on.** Apart from **Date range**, every range type is worked out again at each run. The dates shown while setting up are only an example for today.
- **Filters are copied, not linked.** A report keeps its own copy of its people rules. New starters who match the rules are included automatically.
- **Other sections exist.** The **Configure** window also has **Sort Order**, **Custom Ranges**, **Columns**, **Print Preferences**, **Security** and **Under The Bonnet**. Their defaults suit most reports. If someone removes every column, saving shows **At least one column must be selected**.
- **Password-protected files.** A report owner can set a password under **Security**. Everyone who opens that XLSX file then needs the password, including recipients. Other formats are never protected.
- **Language and time zone.** A new report uses the company's language and time zone. Schedules run at that time zone's clock time. They can be changed under **Under The Bonnet**.
- **Forwarded files follow permissions.** A colleague who lacks Read on the report's data sees the forwarded row, but its **Open**, **Save** and **Forward** buttons are greyed out.
- **Emails are only for scheduled runs.** The two email switches and the recipients apply when the report runs on its schedule. A report you run by hand only goes to your own Report History, so forward it if others need it.
- **A failed run shows Error in Report History.** Pointing at it shows an error code for support. **[Check: the list of error codes support should recognise and what each means.]**
- **If access changes,** a saved report stays in the list, but its runs can fail until the owner has the Read rows again. **[Check: the exact status and message a user sees in this case.]**
- **Scheduled runs of a report the company no longer has** stop by themselves. **[Check: what the owner sees when a template is removed from their company.]**
- **Deleting a saved report** is permanent. **[Check: whether files it already produced stay in Report History, and how they are named.]**
- **Web only.** Reports is part of the web version. The timeware app for employees does not include it.

# Common support questions

## “The report I need isn’t in the list when I click Add Report.”

The user’s policy cannot read the data behind it. Check Table 2 for the rows each kind of report needs. After a policy change, the user should log out and back in.

## “My manager’s copy of the report has more people than mine.”

That is expected. Each run follows the runner’s policy **Employee Filter** and the report’s own **Employee Filter**. Compare both.

## “How do I get this report as a PDF?”

Only the formats the template offers have a Generate button. [Check: current format availability, see [Output formats](#).]

## “The email arrived but there is no attachment.”

That is by design. The email has a **View Report** button that opens the Reports page, where the file is in Report History.

## “My colleague didn’t get the scheduled report.”

Check they are in the report’s recipients on the **Occurrence** section, and that it is set to **Daily** or **Monthly**, not **Never**. If they can see the row but cannot open it, they need Read on the report’s data.

## “It won’t let me save my new report.”

The most common cause is a name that matches one of the user’s existing reports, for example adding the same template twice. Give it a different name.

## “An old report file has disappeared.”

Report History keeps the newest 150 files per person. Run the report again for a fresh copy.

# Try it yourself

Use a demo or training company, never a customer's.

## 1 Add a people report

Click **Add Report**, find **Essential Details Listing** and click **Select**. Name it "Training – one site".

## 2 Filter it to one site

In **Employee Filter**, choose one site and click **Apply**. Note the "of" count, then click **Create**.

## 3 Run it

Click **Generate XLSX**. Watch the status in Report History, then click **Open** in the message and check only that site is listed.

## 4 Add a leave report with a date range

Add **Leave Entry Listing** with **Previous month**. Read the "Report will run from ... to ..." line before clicking **Create**.

## 5 Schedule and share it

Configure the leave report to run **Monthly** on the 1st at 07:00, add a training colleague as a recipient, and click **Update**. Check the **Next Occurrence** column.

## 6 Forward and tidy up

Forward your people report file to the same colleague. Then copy one report, delete the copy, and set the schedule back to **Never**.

### TIP

**Check your understanding.** A payroll clerk scheduled a monthly timesheet report with her manager as a recipient. The manager sees it arrive in his Report History every month, but its Open and Save buttons are greyed out. Nothing is broken. What would you check first?

Answer: the manager's application policy. Forwarded and scheduled copies follow the recipient's own permissions, so he needs Read on **Time > Timesheets** to open a timesheet report.