

## Filters: Applying Filters to Review Your Subs and Temps

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This lesson will walk you through the process of setting up a filter within your TCP Dashboard that will enable you to view the subs and temps that have worked at your location during the current pay period.

### 1. Creating the Sub/Temp Filter

The screenshot shows the TimeClock Plus dashboard. At the top, there is a search bar and a navigation menu with tabs for HOME, HOURS, SCHEDULES, EMPLOYEE, REPORTS, and TOOLS. Under the HOURS tab, there are sub-tabs for Individual Hours and Group Hours. A circled '1' highlights the Group Hours sub-tab. Below this, the 'GROUP HOURS' section is visible, featuring a star icon, a 'Sort by: ID ↑' dropdown, a date range selector (1/22/2018 to 2/4/2018), a 'This Period' dropdown, and an 'Update' button. Below the date range, there are three filter buttons: 'Employee Filter', 'Job Code Filter' (highlighted with a circled '2'), and 'Exception Filter'. There is also a 'Show absences' checkbox. At the bottom of the section, there is a '+ Add' button and a text prompt: 'Adjust the settings above and click "Update"', followed by an 'Update' button.

1. Select **Group Hours**.
2. Then select **Job Code Filters**.

## 2. Begin the Filtering Process

Filter Job Code ?

Include selected ▾

Non-Clockable  Leave  Active only

< Page 1 >

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Showing 1-100 records of 1329 Selected 0 records

<input type="checkbox"/>	Job Code ↑	Description	Group
<input type="checkbox"/>	150	SHIFT DIFFERENTIAL	FSD
<input type="checkbox"/>	151	SHIFT DIFFERENTIAL 2ND POS	FSD
<input type="checkbox"/>	160	CALL OUT	FSD
<input type="checkbox"/>	161	CALL OUT 2ND POS	FSD
<input type="checkbox"/>	310	ANNUAL LEAVE EXEMPT	FSD
<input type="checkbox"/>	311	ANNUAL LEAVE ESSA	FSD
<input type="checkbox"/>	312	ANNUAL LEAVE 2ND POS	FSD
<input type="checkbox"/>	320	PERSONAL LEAVE CERT	FSD
<input type="checkbox"/>	321	PERSONAL LEAVE ESSA	FSD

Search for your location's three letter school/department code. If you don't know what this is contact Payroll or Technology.

## 3. Enter Your Three Letter School Code

Filter Job Code ?

Include selected ▾

Active only

Showing 17 records of 17 Selected 0 records

<input type="checkbox"/>	Job Code ↑	Description	Group
<input type="checkbox"/>	5220130	DNL-NB-SUB-TEACH-CERTIFIED	DNL
<input type="checkbox"/>	5225130	DNL-FA-PT-SUB	DNL
<input type="checkbox"/>	5230130	DNL-NB-SUB-TEACH-NON-CERT	DNL
<input type="checkbox"/>	5231130	DNL-NB-SUB-TEACH-NON-CERT48	DNL
<input type="checkbox"/>	5235130	DNL-NB-SUB-TEACH-INTERN	DNL
<input type="checkbox"/>	5240130	DNL-NB-SUB-TEACH-LONG-TERM	DNL
<input type="checkbox"/>	5460130	DNL-NB-ADMIN-SECRETARY	DNL
<input type="checkbox"/>	5462130	DNL-NB-BREAK-AIDE	DNL
<input type="checkbox"/>	5470130	DNL-NB-INST-KINDER-AIDE	DNL

When you enter your three letter school code, all the sub and temp job codes associated with your location will appear. In some cases, your school code might bring in codes not associated with your school. Examples include Anderson and Lathrop.

## 4. Select Job Codes

Filter Job Code

Include selected ▾ 2

Active only dnl ✕

Showing 17 records of 17 Selected 17 records

<input checked="" type="checkbox"/>	Job Code ↑	Description	Group
<input checked="" type="checkbox"/>	5220130	DNL-NB-SUB-TEACH-CERTIFIED	DNL
<input checked="" type="checkbox"/>	5225130	DNL-FEA-PT-SUB	DNL
<input checked="" type="checkbox"/>	5230130	DNL-NB-SUB-TEACH-NON-CERT	DNL
<input checked="" type="checkbox"/>	5231130	DNL-NB-SUB-TEACH-NON-CERT48	DNL
<input checked="" type="checkbox"/>	5235130	DNL-NB-SUB-TEACH-INTERN	DNL
<input checked="" type="checkbox"/>	5240130	DNL-NB-SUB-TEACH-LONG-TERM	DNL
<input checked="" type="checkbox"/>	5460130	DNL-NB-ADMIN-SECRETARY	DNL
<input checked="" type="checkbox"/>	5462130	DNL-NB-BREAK-AIDE	DNL
<input checked="" type="checkbox"/>	5470130	DNL-NB-INST-KINDER-AIDE	DNL

3

Save as Load Disable Cancel Filter

1. Select all or some of the job codes that appear in this list. Again, if you are a school such as Anderson or Lathrop, you will want to select individual job codes.
2. Make sure that ***Include selected*** is selected
3. Then select ***Save As***.

## 5. Saving your Job Code Filter

Save Job Code Filter

Save current Job Code filter

Name Dnl Subs and Temps

Saved Job Code Filters

No records found

Save

Name your filter then select **Save**.

## 6. Reviewing Your Filter Selections

Filter Job Code

Include selected ▾ 2

Active only  dni

Showing 17 records of 17 Selected 17 records

<input checked="" type="checkbox"/>	Job Code ↑	Description	Group
<input checked="" type="checkbox"/>	5220130	DNL-NB-SUB-TEACH-CERTIFIED	DNL
<input checked="" type="checkbox"/>	5225130	DNL-FEA-PT-SUB	DNL
<input checked="" type="checkbox"/>	5230130	DNL-NB-SUB-TEACH-NON-CERT	DNL
<input checked="" type="checkbox"/>	5231130	DNL-NB-SUB-TEACH-NON-CERT48	DNL
<input checked="" type="checkbox"/>	5235130	DNL-NB-SUB-TEACH-INTERN	DNL
<input checked="" type="checkbox"/>	5240130	DNL-NB-SUB-TEACH-LONG-TERM	DNL
<input checked="" type="checkbox"/>	5460130	DNL-NB-ADMIN-SECRETARY	DNL
<input checked="" type="checkbox"/>	5462130	DNL-NB-BREAK-AIDE	DNL
<input checked="" type="checkbox"/>	5470130	DNL-NB-INST-KINDER-AIDE	DNL

1 Save as Load Disable 4 Cancel Filter

Notes Time In Actual Time In Time Out Actual Time Out Hours Day Total Week Total Job

1. Review your filter by selecting **Load**. This shows your saved template(s).
2. Verify that **Include selected** is showing
3. and that your job codes are selected.
4. Finally, select **Filter** to save.

## 7. Disable the Employee Filter by Location

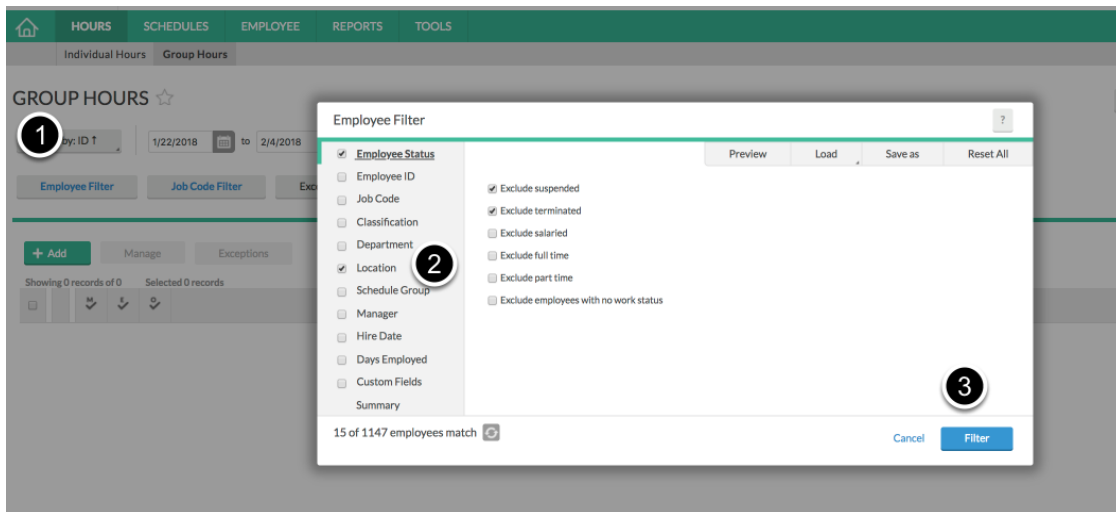
GROUP HOURS ☆

Sort by: ID ↑ | 1/22/2018 to 2/4/2018 | This Period | Update

Employee Filter Job Code Filter Exception Filter  Show absences

At this point, both of your filters are blue - meaning they are active. You need to disable the Employee Filter by Location in order to see only the subs and temps.

## 8. Select Employee Filter



1. Select **Employee Filter**.
2. In the pop-up window, **deselect Location**.
3. Select **Filter**.

## 9. Sub and Temps are viewable

GROUP HOURS ☆ Options

Sort by: ID ↑ 1/22/2018 to 2/4/2018 This Period Update

Employee Filter Job Code Filter Exception Filter  Show absences

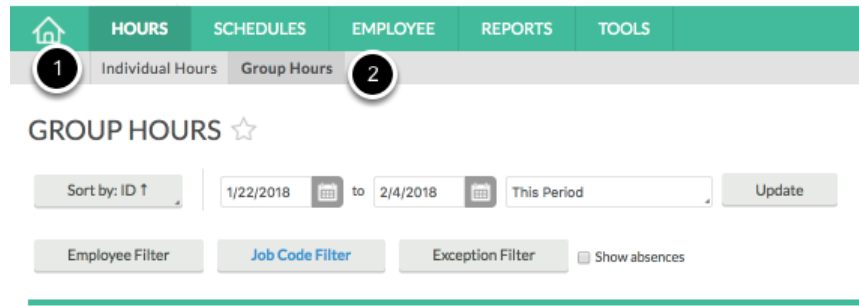
+ Add Manage Exceptions Processing Resolve Period

Showing 44 records of 44 Selected 0 records

				Notes	Time In	Actual Time In	Time Out	Actual Time Out	Hours	Day Total	Week Total	Job Code
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		1/22/2018 08:15 AM	1/22/2018 08:12 AM	1/22/2018 03:45 PM	1/22/2018 03:39 PM	7.50	7.50		5220130 - DNL-NB-SUB-TEACH-CERTIFIED
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		1/23/2018 08:15 AM	1/23/2018 08:17 AM	1/23/2018 04:00 PM	1/23/2018 03:59 PM	7.75	7.75		5220130 - DNL-NB-SUB-TEACH-CERTIFIED

1. Employee filter is black - meaning it is currently disabled. Job Code Filter is blue - meaning this is the active filter.
2. Subs and temps are viewable.

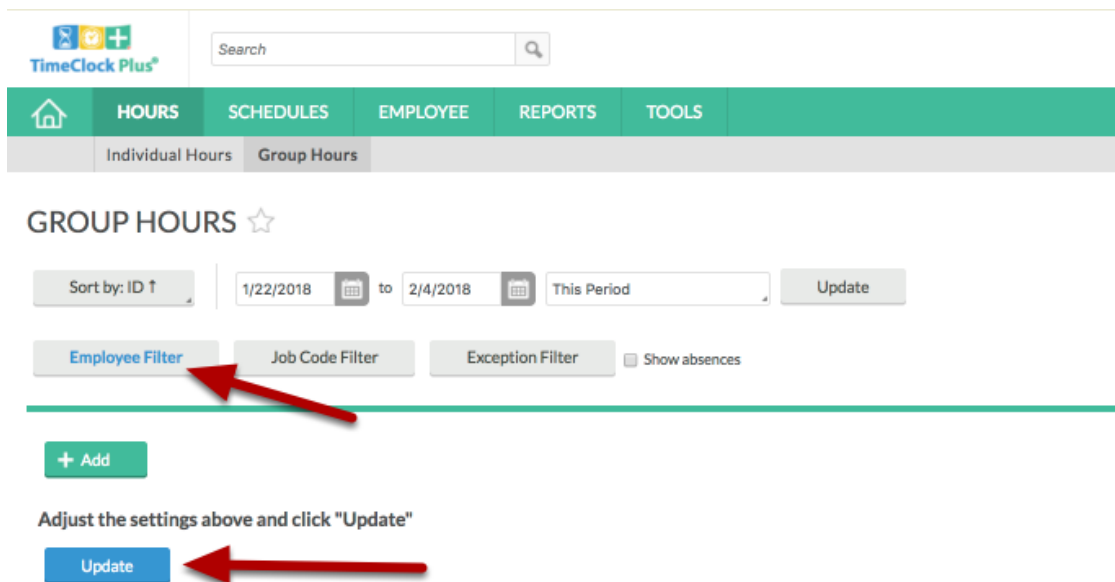
## 10. To See Your Staff Again



1. Click **Individual Hours**.
2. Then click **Group Hours**.

***This step resets your filter to your Global filter, enabling you to see your employees again.***

## 11. Select Update



Notice that the Employee Filter is blue - this is the active filter.  
Select **Update**.

## 12. Staff are now visible.

The screenshot shows the 'GROUP HOURS' interface. At the top, there are navigation tabs: HOME, HOURS, SCHEDULES, EMPLOYEE, REPORTS, and TOOLS. Below these are sub-tabs for 'Individual Hours' and 'Group Hours'. The main heading is 'GROUP HOURS' with a star icon. Below the heading are filters: 'Sort by: ID ↑', a date range '1/22/2018 to 2/4/2018', a dropdown 'This Period', and an 'Update' button. There are also buttons for 'Employee Filter', 'Job Code Filter', 'Exception Filter', and a checkbox for 'Show absences'. Below the filters are buttons for '+ Add', 'Manage', 'Exceptions', 'Processing', and 'Resolve Period'. The main content area shows 'Showing 39 records of 39' and 'Selected 0 records'. A table header is visible with columns: Notes, Edited, Break Length, Time In, Actual Time In, Time Out, and Ac. The table contains three rows of data for employee 21590 - BERNICE CREEK.

Notes	Edited	Break Length	Time In	Actual Time In	Time Out	Ac
			1/22/2018 07:15 AM	1/22/2018 07:21 AM	1/22/2018 02:00 PM	1/22/2018 02:00 PM
			1/22/2018 02:30 PM	1/22/2018 02:36 PM	1/22/2018 04:00 PM	1/22/2018 04:00 PM

## 13. To Activate the Job Code Filter Again (to see subs and temps)

The screenshot shows the 'GROUP HOURS' interface with two annotations. Annotation 1 is a circle around the 'Group Hours' sub-tab. Annotation 2 is a circle around the 'Job Code Filter' button. Below the filters are buttons for '+ Add', 'Manage', 'Exceptions', 'Processing', and 'Resolve Period'. The main content area shows 'Adjust the settings above and click "Update"' and an 'Update' button.

1. Select **Group Hours**.
2. Select **Job Code Filter**.

## 14. Load Your Saved Template

Filter Job Code

Include selected ▾

Non-Clockable Leave Active only Search

Page 1 Select All Deselect All

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Showing 1-100 records of 1329 Selected 0 records

Job Code ↑	Description	Group
150	SHIFT DIFFERENTIAL	FSD
151	SHIFT DIFFERENTIAL 2ND POS	FSD
160	CALL OUT	FSD
161	CALL OUT 2ND POS	FSD
310	ANNUAL LEAVE EXEMPT	FSD
311	ANNUAL LEAVE ESSA	FSD
312	ANNUAL LEAVE 2ND POS	FSD
320	PERSONAL LEAVE CERT	FSD
321	PERSONAL LEAVE ESSA	FSD

1 Load Disable 2 Filter

Saved Templates Dnl 2

1. Select **Load** and select the template you created.
2. Click **Filter**.
3. You will need to disable the Employee Filter. See Steps 7 - 9.