

# CalTime: Running Reports

The **Reports** function in CalTime provides predefined standard reports. CalTime extracts data from the CalTime database and formats it in rows and columns that can be displayed and printed. When the **Reports** window is accessed, the available reports will be listed in the left section of the window. The report categories are:

## Access Report Function

1. To access Reports from the Manage My Department (Default tab), select the applicable genie (at the top left) by clicking the drop down arrow or insert the name or employee id in the quickfind field.
2. Click on the applicable pay period and the select the hyperfind at the top right.
3. Click on the Go To icon and select Reports
4. Click on **Reports** (located on the right of your timecard in blue tool bar)

Manage My Department

Genies

Non-Exempt Pay Period Close

Loaded 4:30PM

Previous Pay Period

FTRAN Non-Exempt Emplo

Select All Rows | Column Selection | Filter | People | Timekeeping | Approval

Refresh | Share | Go To

Empl...	Employee Nam...	Home Dep...	Job Home...	Title ...	Empl... Appr...	Spvr ... Multi... Frien...	Spvr ... Single... Frien...	HCM Manager	Signe... Off	Miss... Punct
0129...	Park, Marvin	FTRAN	FTRAN	4329U	n/a			W, Jan		
0129...	Copeland, Bob	FTRAN	FTRAN	5335C	n/a			Park, Marvin		

110 Selected

Previous Pay Period

Go to widget

- Timecards
- Audits
- Exceptions
- People Editor
- Reports**
- Rule Analysis
- Schedules
- Go to workspace

5. A list of available report categories will appear.

Manage My Department

Reports

Reports

SELECT REPORTS | CHECK REPORT STATUS

Run Report | Refresh

Create Favorite | Save Favorite | Duplicate Favorite | Delete Favorite

- + All
- + Accruals
- + Configuration
- + Detail Genie
- + Roll-Up Genie
- + Scheduler
- + Timecard**
- + Working Time Directive

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<b>All</b>	alphabetical list of all standard and custom reports to which you have access
<b>Accruals</b>	information about accrual activity and balances
<b>Configuratio</b>	descriptions of components configured in CalTime, such as payroll rules
<b>Detail Genie</b>	employee-specific information, also available when you click the <b>Reports</b> quick link from a detail Genie. (Detail Genies display employee-specific information.)
<b>Roll-up Genie</b>	summarized information by labor account or schedule group, also available when you click the <b>Reports</b> QuickLink from a roll-up Genie. (Roll-up Genies display specific information by labor account.)
<b>Scheduler</b>	detailed schedule information, also available when you click the <b>Reports</b> quick link from the <b>Schedule Editor</b>
<b>Timecard</b>	time and attendance, accruals, and schedule information, also available when you click the <b>Reports</b> quick link from an employee's timecard

Reports commonly used by timekeepers are:

<b>Employee Transact</b>	This report shows pay code transactions and totals by employee for a selected time period. The <b>Pay Code</b> transactions are displayed prior to having pay rules or the <b>Totalizer</b> applied. The <b>Pay Code</b> totals are the calculated values after the pay rules or <b>Totalizer</b> have been applied.
<b>Accrual Detail</b>	This report shows running accrual balances for each employee who is included in the report, along with each accrual credit and debit for the selected <b>time period</b> .
<b>Employee Hours by Labor Account</b>	This report sorts all the time reported by a set of employees by labor account. This report will include friendly name data. Note: The Actual/Adjusted criteria field defaults to show hours credited to this period only. Choose the option "Show hours credited to this period plus historical edits made for this period" to get results that include any historical edits made to the data.
<b>Time Detail</b>	This report shows punch, <b>Pay Code</b> edit, and transaction information for individual employees. The timecard data in the report is pulled from the selected <b>time period</b> .
<b>Timecard Audit Trail</b>	The <b>Timecard Audit Trail</b> report displays audit information that is related to specific timecard edit actions, including the date/time of the action, who performed the action, and what information changed. Note: This report is intended for use in addressing issues with individual timecards.
<b>Timecard Sign-off, Request</b>	The <b>Timecard Sign-off, Request and Approval Audit Trail</b> report displays audit information related to sign-off or approval of timecards and requests, and includes the date and time of the audit and who performed which action.

## Select and Run a Report

- When a report is selected in the left section of the Reports window, a description will be listed in the right side of the window. A timekeeper should review the description, and verify the report will generate the desired results. For example, the Accrual Detail report was selected in the snapshot below.

The screenshot shows the 'REPORTS' window with a left sidebar and a main content area. The sidebar lists various report categories: All, Accruals, Configuration, and Detail Genie. Under 'Accruals', several sub-reports are listed, with 'Accrual Detail' highlighted in orange. The main content area displays the 'ACCRUAL DETAIL' report description and configuration options. The description states: 'Displays running accrual balances for each employee. For example, you can see what types of accrual transactions occurred in the past, when accrual balances were reset, and effective dates.' Below the description, there are three configuration fields: 'People' (set to 'Previously Selected Employee(s)'), 'Time Period' (set to 'Previous Pay Period'), and 'Output Format' (set to 'Adobe Acrobat Document(.pdf)'). At the top of the window, there are buttons for 'SELECT REPORTS', 'CHECK REPORT STATUS', 'Run Report', 'Refresh', 'Create Favorite', 'Save Favorite', 'Duplicate Favorite', and 'Delete Favorite'.

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Most reports require specific criteria be applied. The fields for selecting the available criteria are located in the right section of the Reports window. Common required criteria are:

<b>People</b>	the employee or group for which you want data
<b>Time Period</b>	the specific time period parameters for the report
<b>Output format</b>	PDF is the default, though some reports have a <i>Microsoft Excel</i> option (indicated in the title of the report)

7. The People field, has a list of options such as Previously Selected Employees (click drop down for additional options).
8. Select Time Period by clicking on the drop down arrow. You have several options including selecting a range of dates.
9. Click on Run Report. A new screen will open.

The screenshot shows the 'REPORTS' section of the CalTime interface. At the top, there are two tabs: 'SELECT REPORTS' (active) and 'CHECK REPORT STATUS'. Below the tabs, there are several buttons: 'Run Report' (highlighted with a red box and arrow), 'Refresh Status', and 'Delete'. Below these are four buttons: 'Create Favorite', 'Save Favorite', 'Duplicate Favorite', and 'Delete Favorite'. On the left, there is a list of report categories with expandable options. On the right, the 'TIME DETAIL' configuration panel is shown, containing the following fields:

- Description:** Displays detailed data about each employee's punches, duration, and pay code edits. Summary data is displayed per employee, totaling time and money by labor level and pay code (excluding combined pay codes) and then by pay code only (separately listing combined pay codes).
- People:** Previously Selected Employee(s) (dropdown menu)
- Time Period:** Current Pay Period (dropdown menu)
- Page Break between Employees:** No (dropdown menu)
- Actual/Adjusted:** Show hours worked in this period only. (dropdown menu)
- Sort by:** Default (dropdown menu)
- Output Format:** Adobe Acrobat Document(.pdf) (dropdown menu)

10. The report Status Column will show as waiting. When the Status changes to Complete, you may click on View Report. The report will cycle through three statuses:
  - Waiting-The report is queued up to run in CalTime
  - Running- The report is being processed in CalTime
  - Complete – The report is ready to view

The screenshot shows the 'REPORTS' section of the CalTime interface. At the top, there are two tabs: 'SELECT REPORTS' (active) and 'CHECK REPORT STATUS'. Below the tabs, there are three buttons: 'View Report' (highlighted with a red box), 'Refresh Status', and 'Delete'. Below these are a search bar with 'Name' and a 'Search' button. Below the search bar is a table with the following columns: Report Name, Format, Date In, Date Done, Status, Output, and User.

Report Name	Format	Date In	Date Done	Status	Output	User
Time Detail	pdf	3/15/2017 11:28AM		Waiting	Screen	supervisor
Time Detail	pdf	3/15/2017 11:26AM	3/15/2017 11:27AM	Complete	Screen	supervisor

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11. The report will open as a PDF and is displayed below (see example of Time Detail report below).

Time Detail						Data Up to Date:		3/15/2017 11:27:15 AM				
Time Period:		Current Pay Period		Executed on:		3/15/2017 11:26AM GMT-07:00						
Query:		Previously Selected Employee(s)		Printed for:		supervisor						
Actual/Adjusted:		Show hours worked in this period only.		Insert Page Break After Each Employee:		No						
Employee: Copeland, Bob		ID: 012345678		Time Zone:		Pacific						
Status: Active		Status Date: 7/20/2015		Pay Rule:		PPSM_NonEx_OTP Day 60d						
Primary Account		Start		End								
DTLAB-ASST4-SSDATA/-/-0		8/28/2016		Forever								
Date/Time	Apply To	In Punch	In Exc	Out Punch	Out Exc	Override Amount	Adj/Ent Amount	Money Amount	Day Amount	Totaled Amount	Cum. Tot. Amount	
<i>Xfr/Move: Account</i>		<i>Comment</i>		<i>Xfr: Work Rule</i>								
3/13/2017		8:00:00 AM		5:00:00 PM						8.00	8.00	
3/14/2017		8:00:00 AM		5:00:00 PM						8.00	16.00	
3/15/2017		8:00:00 AM		5:00:00 PM						8.00	24.00	
<b>Labor Account Summary</b>						<b>Pay Code</b>		<b>Hours</b>		<b>Money</b>		<b>Days</b>
DTLAB-ASST4-SSDATA/						C-Holiday Lookback		24.00				
						C-Total Hours		24.00				
						Regular		24.00				
<b>Combined Pay Code Summary</b>						<b>Pay Code</b>		<b>Hours</b>		<b>Money</b>		<b>Days</b>
						C-Holiday Lookback		24.00				
						C-Total Hours		24.00				
<b>Totals:</b>								48.00		\$0.00		0.00
<b>Pay Code Summary</b>						<b>Pay Code</b>		<b>Hours</b>		<b>Money</b>		<b>Days</b>
						Regular		24.00				
<b>Totals:</b>								24.00		\$0.00		0.00