Running and Printing 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:

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

Reports commonly used by timekeepers are:

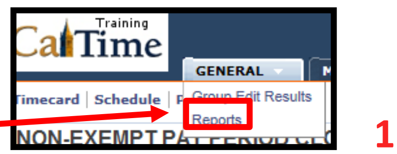
Employee Transactions and Totals	This report shows pay code transactions and totals by employee for a selected time period. The **Pay Code** transactions are displayed prior to having pay rules or the **Totalizer** applied. The **Pay Code** totals are the calculated values after the pay rules or **Totalizer** have been applied.
Accrual Detail	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 **time period**.
Employee Hours by Labor Account	This repot 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.
Time Detail	This report shows punch, **Pay Code** edit, and transaction information for individual employees. The timecard data in the report is pulled from the selected **time period**.
Timecard Audit Trail	The **Timecard Audit Trail** 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.
Timecard Sign-off, Request and Approval	The **Timecard Sign-off, Request and Approval Audit Trail** 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.

When a report is selected in the left section of the **Reports** window, a description of what the report generates 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.

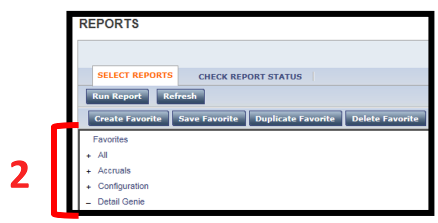
Most reports require specific criteria be applied. The fields for selecting the available criteria are located in the right section of the **Reports** window. Common required criteria are:

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

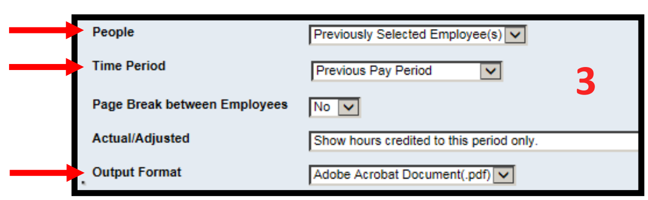
1. Navigate to the **Reports** window one of two ways:
   - From the **General** menu select **Reports**.
   - From within a Genie, select the employees you want to report on and select **Reports**.



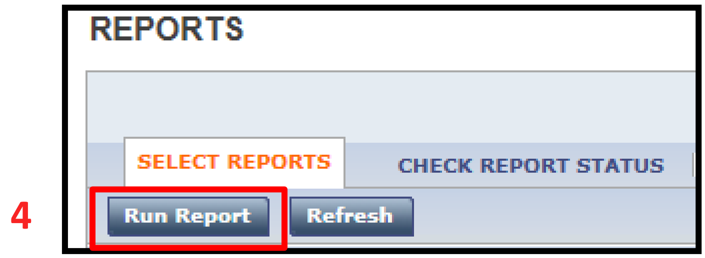
2. Select the report you want to run from the **Reports** menu in the left section of the window.



3. Input or verify the criteria for your report on the right section of the window. **People**, **Time Period**, and **Output Format** are common criteria. Depending on the report you have selected, additional criteria may be required.



4. Click the **Run Reports** button.



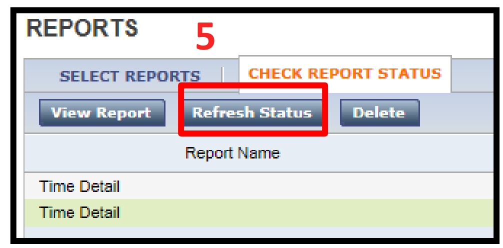
5. Click the **Refresh Status** button

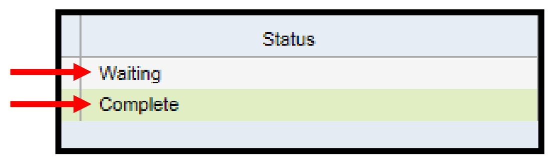
The report will cycle through three steps:

1—**Waiting**, the report is queued up to run in CalTime.

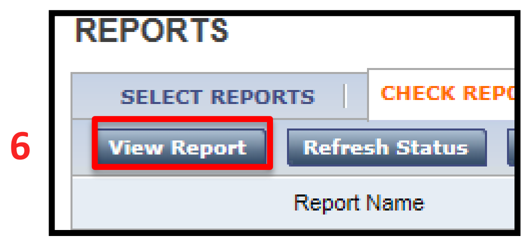
2—**Running**, the report is being processed in CalTime.

3—**Complete**, the report is ready to view.





6. To view the report, click the **View Report** button.



7. To save or print the report, move your cursor toward the bottom of the report, and the pdf menu will appear. Click the appropriate button on the menu.