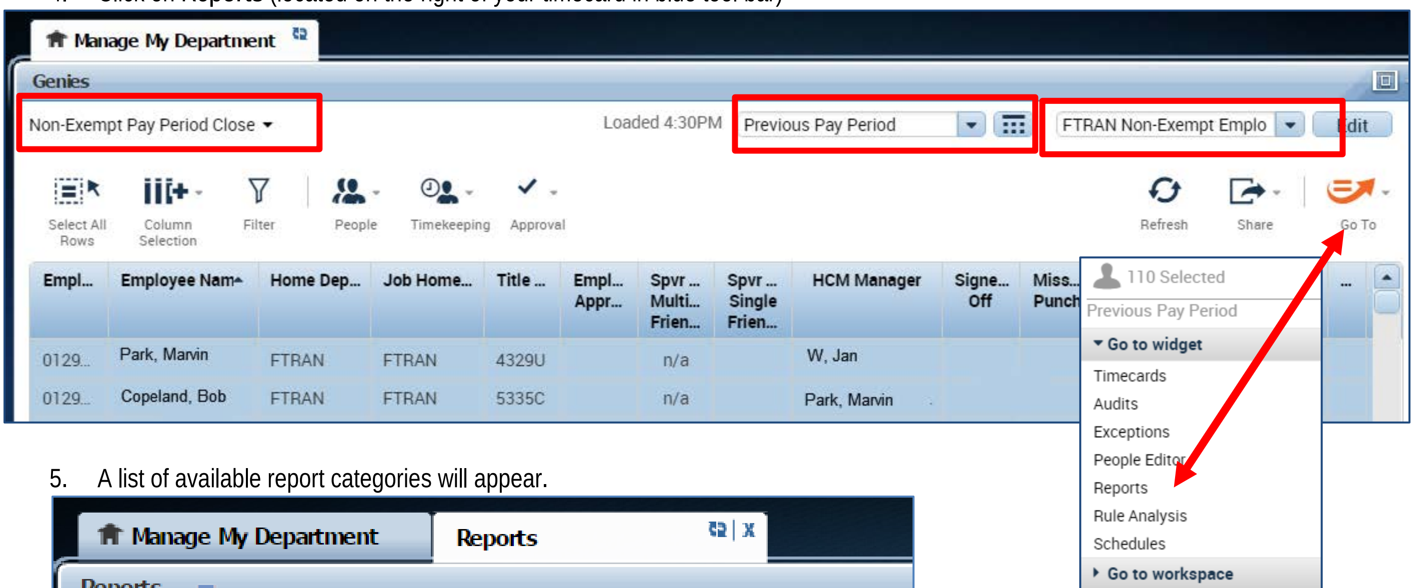
CalTime: Running Reports

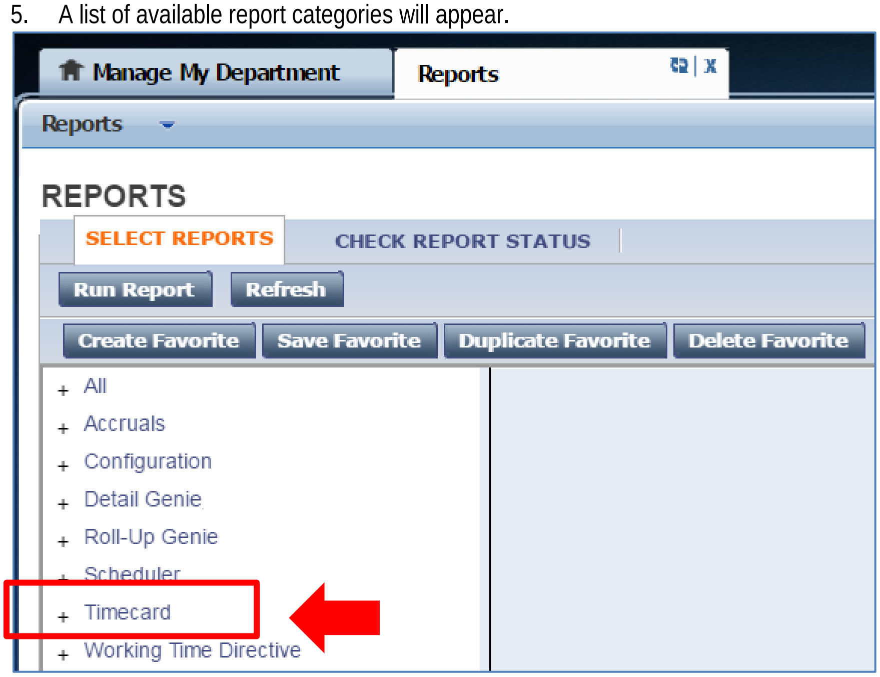
The Reports function in CalTime provides predefined standard reports. CalTime extracts data from the CalTime database and formats it in rows and columns that can be displayed and printed. When the Reports window is accessed, the available reports will be listed in the left section of the window. The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



5. A list of available report categories will appear.



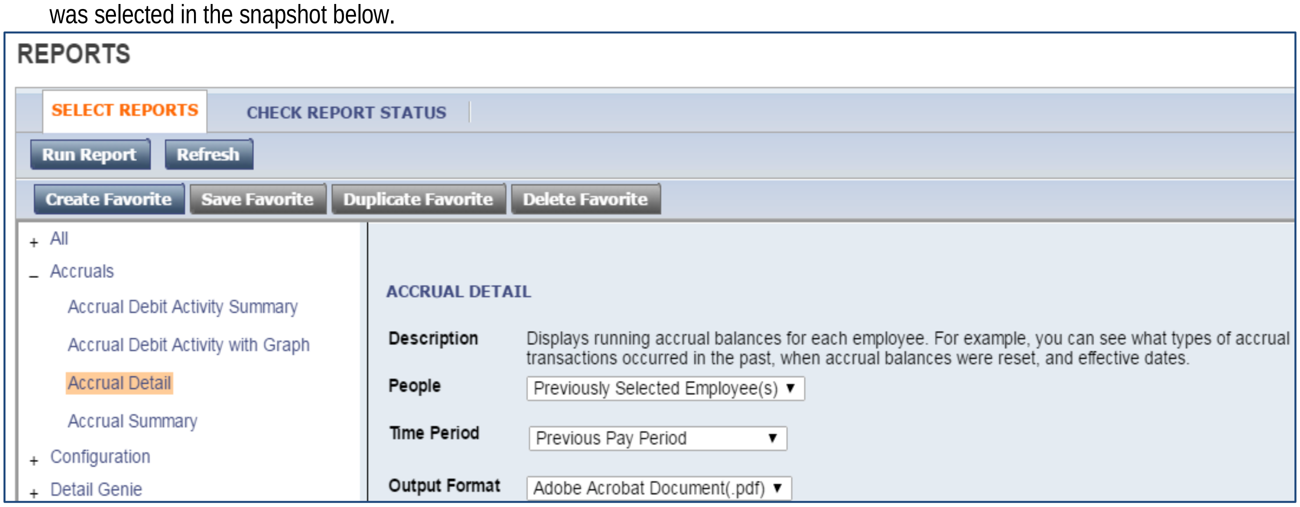
All	alphabetical list of all standard and custom reports to which you have access
Accruals	information about accrual activity and balances
Configuratio	descriptions of components configured in CalTime, such as payroll rules
Detail Genie	employee-specific information, also available when you click the 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:

Employe e Transact	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	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.

Select and Run a Report

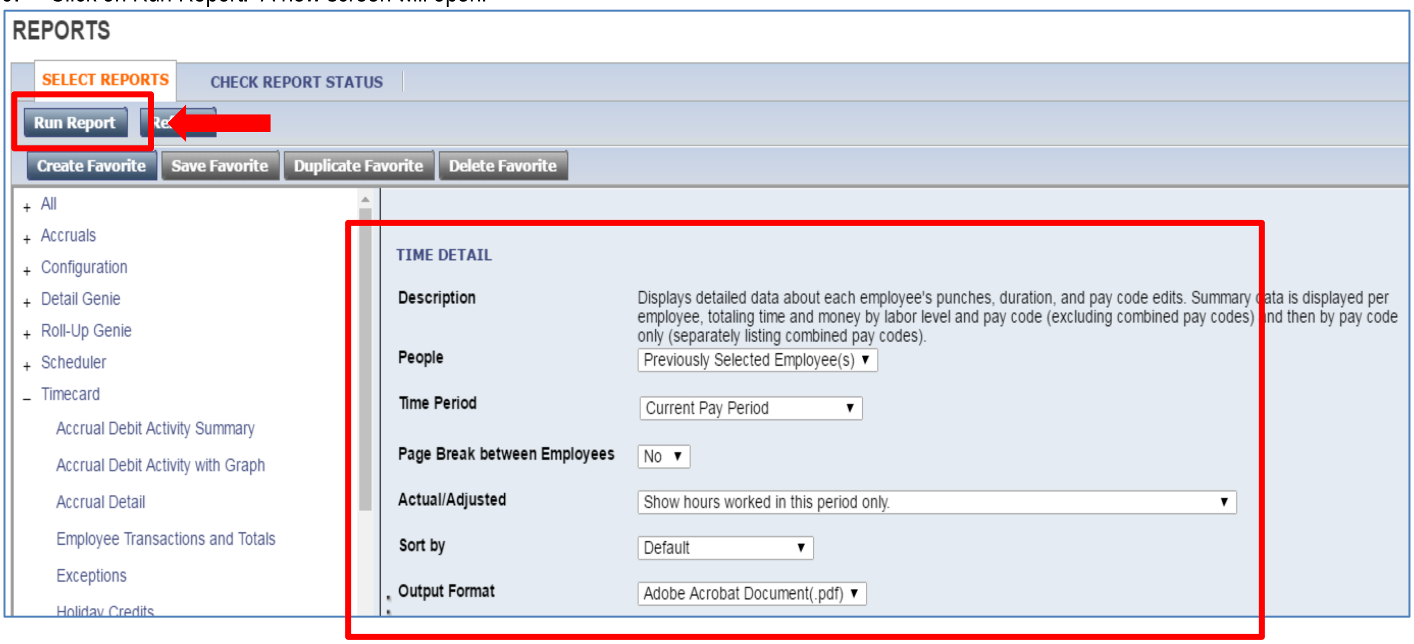
6. When a report is selected in the left section of the Reports window, a description will be listed in the right side of the window. A timekeeper should review the description, and verify the report will generate the desired results. For example, the Accrual Detail report was selected in the snapshot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



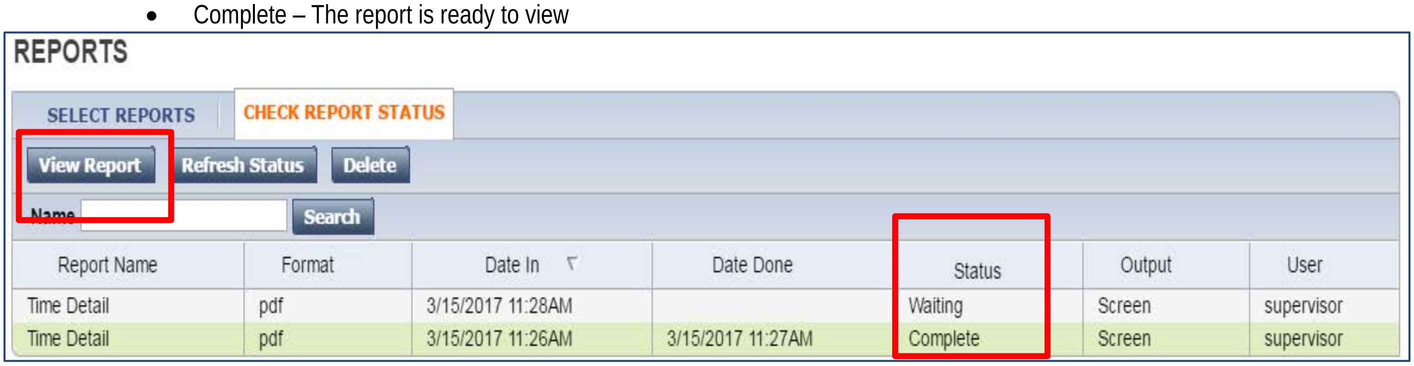
Most reports require specific criteria be applied. The fields for selecting the available criteria are located in the right section of the Reports window. Common required criteria are:

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)

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.



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



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

Time Detail

Time Period:	Current Pay Period	Data Up to Date:	3/15/2017 11:27:15 AM
Query:	Previously Selected Employee(s)	Executed on:	3/15/2017 11:26AM GMT-07:00
Actual/Adjusted:	Show hours worked in this period only.	Printed for:	supervisor
		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 *Xfr/Move: Account*	Apply To	In Punch *Comment*	In Exc	Out Punch *Xfr: Work Rule*	Out Exc	Override Amount	Adj/Ent Amount	Money Amount	Day Amount	Totaled Amount	Cum. Tot. Amount
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

Labor Account Summary	Pay Code	Hours	Money	Days
DTLAB-ASST4-SSDATA/				
	C-Holiday Lookback	24.00		
	C-Total Hours	24.00		
	Regular	24.00		

Combined Pay Code Summary	Pay Code	Hours	Money	Days
	C-Holiday Lookback	24.00		
	C-Total Hours	24.00		
Totals:		48.00	$0.00	0.00

Pay Code Summary	Pay Code	Hours	Money	Days
	Regular	24.00		
Totals:		24.00	$0.00	0.00