

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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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:

Employee 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 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.
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

- 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 sidebar on the left and a main content area on the right. The sidebar contains a tree view of reports, with 'Accrual Detail' highlighted. The main area displays the 'ACCRUAL DETAIL' report's description and configuration options.

REPORTS

SELECT REPORTS | CHECK REPORT STATUS

Run Report | Refresh

Create Favorite | Save Favorite | Duplicate Favorite | Delete Favorite

+ All

- Accruals

- Accrual Debit Activity Summary
- Accrual Debit Activity with Graph
- Accrual Detail**
- Accrual Summary

+ Configuration

+ Detail Genie

ACCRUAL DETAIL

Description 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.

People Previously Selected Employee(s) ▼

Time Period Previous Pay Period ▼

Output Format Adobe Acrobat Document(.pdf) ▼

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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:

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 <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' interface. At the top, there are two tabs: 'SELECT REPORTS' (active) and 'CHECK REPORT STATUS'. Below the tabs are buttons for 'Run Report', 'Refresh', 'Create Favorite', 'Save Favorite', 'Duplicate Favorite', and 'Delete Favorite'. The 'Run Report' button is highlighted with a red box and a red arrow. Below these buttons is a list of reports on the left and a configuration panel on the right. The configuration panel, titled 'TIME DETAIL', is also highlighted with a red box and contains 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) ▼
- Time Period:** Current Pay Period ▼
- Page Break between Employees:** No ▼
- Actual/Adjusted:** Show hours worked in this period only. ▼
- Sort by:** Default ▼
- Output Format:** Adobe Acrobat Document(.pdf) ▼

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' interface with the 'CHECK REPORT STATUS' tab active. At the top, there are buttons for 'View Report', 'Refresh Status', and 'Delete'. Below these buttons is a search bar with 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. The 'View Report' button is highlighted with a red box. The 'Status' column in the table is also highlighted with a red box. The table contains the following data:

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	
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