Workforce Central

Reports Reference Guide

An overview of standard and custom reports.

Kronos Workforce Central suite version 8.0

KRONOS®

Document Revision History

Document Revision	Release Date
A	August 2015
B	April 2018

Contents

Chapter 3: Scheduler reports

Chapter 5: Attendance reports

Chapter 9: Custom Reports

Chapter 1

About Workforce Central Reports

The Workforce Central suite components generate numerous reports, most of which are standard to the components. This document includes reports for timekeeping, scheduling, activities, attendance, and leave, as well as reports for timecard, and biometrics. The reports that are available depend on the products installed.

To find a report that lists a particular item, such as pay codes, use the search capability in the PDF.

Note: This reference guide is a living document, and will be updated as report information and reports are developed.

This chapter contains information about reports, including:

What's new

In v8.0, the System Settings Audit report was added to Timekeeping reports.

Operational Reporting

Most users are looking for a simple solution to access their data and create reports that are meaningful to their organization. An Excel-based solution was created using JETT (Java Excel Template Translator) for Business Analysts who are Excel experts to create reports. The reports can be accessed through the Workforce Central reporting workspace. They address the top data requests for Time Detail, Hourly Summary, Scheduling, and Employee. For more information, see *Getting Started with Excel-based Operational Reporting*.

Some reports that were prepared with data that was determined to be useful for business analysts are included with the Workforce Central installation. The reports are listed in the Timekeeping and Scheduler Reports categories and are designated with (Spreadsheet Export) next to the name.

Finding a report

Note: Reports may be included in more than one category. All reports are included in the All category.

Note: Some of the categories listed may only appear if certain elements are installed on your system.

In the system, reports might be listed in one or more of the following categories:

- **All** — All of the reports (standard and custom) that are available to the user.

- **Accruals** — Reports that contain information about accrual balances and calculations.

- **Activities** — Reports that use Activities data; appears only if Activities is installed on your system.

- **Attendance** — Reports on Attendance information, such as actions, detail, and balances; appears only if Attendance is installed.

- **Biometrics** — Reports on Biometric enrollment.

- **Configuration** — Reports that contain information about the setup of the system.

- **Data Collection** — Reports that contain information about data collection devices and activity codes.

- **Detail Genie** — Reports that relate to the Detail Genies. This list of reports appears by default when you click the Reports launch button when viewing a Detail Genie.

- **Import** — Reports that contain information about imports that have been run. This list of reports appears by default when you click Check Status in the Administration tab of the Import workspace.

- **Leave** — Reports on Leave activities and trends; appears only if Leave is installed.

- **Roll-Up Genie** — Reports that relate to the Roll-Up Genies. This list of reports appears by default when you click the Reports launch button when viewing a Roll-Up Genie.

- **Scheduler** — Reports that contain information related to scheduling and employee schedules. This list of reports appears by default when you click the Reports launch button from within one of the Schedule Genies.

- **Statutory Reports** — Describes the Statutory reports.

- **TeleTime IP Reports** — Describes the TeleTime IP administrative reports.

- **Timecard** — Reports that contain information from and about employee timecards. This list of reports appears by default when you click the Reports launch button from within the Timecard workspace.

- **Working Time Directive** — Reports that provide information about employees affected by Working Time Directive rules.

Common options

Reports have common options, such as Description and Output Format. Common options include:

Description — A brief description of the contents of the report.

People — The employees included in the report. Depending on the report, the People option is a query or location.

Time Period — The time period for which report data is generated. The time period might be pay periods or selected dates.

Output Format — Formats include PDFs and Excel spreadsheets. Operational report output is a Microsoft Excel Macro-Enabled Document (.xlsm).

Common options are *not* included in report descriptions.

Checking report status

Use Check Report Status tab to check on the progress of reports that you have run and to view the results of reports that have completed. Users with the appropriate access rights can view all reports, regardless of who ran the reports.

The Refresh Status table automatically begins refreshing after you press the Refresh button. The table continues to refresh each time a report request is added or deleted from the queue.

The status column reflects the current status of the report with one of the following conditions:

- Waiting
- Updating
- Running
- Complete
- Failed
- You can set the time interval (in seconds) for when the data automatically refreshes by going to **Setup >System Settings > Reports** and modify the `site. reporting.status.refresh.timer.seconds` system setting.

Note: The ability to see reports that were run by other users depends on your access rights.

Deleting reports from the Check Run Status list

A system setting on the Reports tab, called `site.Reporting.RepTimeToLive`, determines when instances of reports are deleted from the system. The instance of a report is deleted after the number of hours specified in this setting has elapsed.

To delete a report

1. Highlight the name of the report by selecting it from the list.
2. Click **Delete** in the Action bar.
3. Click **Yes** in the message box to confirm.

Using Favorites

You can designate any report as a favorite for easy access to reports that are used regularly, using the favorites buttons in the Select Report tab.

To use Favorites from the Select Report tab:

1. Select a report to designate as a favorite.

2. Select **Create Favorite**.

3. On the Favorite Report page, enter the following information:

    – **Favorite Report** — Enter a name for the report.

    – **Author's Remarks** — Enter information that helps you identify the report.

    – Additional fields appear, depending on the report selected. Enter the appropriate information in the fields to reflect the content of the report.

4. Click **Save Favorite**.

5. The favorite report name appears below the Favorites category on the left side of the page. Only the person who created the favorite can access the report by this name.

    Two URLs for the report also appear in the Favorite page. Anyone who has the appropriate report access profile can access a report using the URL of the report.

    – **Data Link** — The report accessed by this URL can only be viewed in Excel. If you copy this link, you can paste it into the Kronos task pane in the Excel page.

    – **Report Link** — The report accessed by this URL can be viewed in any browser. If you copy this link, you can paste it into a browser.

    You also can duplicate or delete a report from the **Favorites** menu.

Dialog boxes for reports

You may need to use one or more of the following dialog boxes when you select and print reports.

E-mail dialog box

Type one or more e-mail addresses for the distribution of a report. Separate multiple e-mail addresses with a comma.

To cancel the e-mail operation and close the dialog box Click **Cancel**.

Select Location dialog box

1. Select the location or job that you want from the organizational map in one of the following ways:

   – On the organizational map, click the plus sign (+) to open a location. Click the minus signs (–) to close the list.

2. Click to select the location or job that you want. All locations and jobs under the checked location are included.

3. To deselect all selected locations or job, click **Clear All**.

4. When you finish, click **OK**.

Custom location sets

1. You can create a group of locations that is available only for your user account. Do either of the following:

   a. To create a new custom location set:

      Select **Select Locations** from the Show drop-down list

      Go to step 2.

    b.   To edit a custom location set:

        Select the custom location set from the Show drop-down list.

        Click **Edit**.

        Go to .

    c.   To delete a custom location set:

        Select the custom location set from the Show drop-down list.

        Click **Edit**.

        In the Select Location dialog box, click **Delete**.

        Click **OK** in the confirmation dialog box.

2.   In the Select Location dialog box:

    a.   Navigate to and select the locations.

    b.   Click **Save As**.

3.   In the Save Custom Location dialog box:

    a.   Enter a Name. The name must be unique, can be up to 30 characters long, and must not include the following characters: `& _ * % ? : ; = ( ) / [ ] \ | # @ < >`

> **Note:** Because the system adds " `- custom`" to the end of the name, you can use the name of a predefined location set. However, you cannot use the same name as another custom location set.

    b.   Click **OK**.

4.   You can now select the custom location from the Show drop-down list.

Relative date range dialog box

Specify a range of days to include in the selected report.

– You can define both start and end dates as either a number of days before the run date or as a number of days after the run date.

– If you specify both a start and end date, the range of days included in the report is from the start date to the end date.

For example, to include the previous week and the current week in a report that is run every Monday, make the start date seven days before the run date and the end date seven days after the run date.

– If no start date is specified, the start date is the day that the report is run. The range of days to include in the report can be either a number of days before the run date or a number of days after the run date.

To cancel the time period setting and close the dialog box Click **Cancel**.

Send to Print dialog box

Choose the printer where the report will be printed. Click the scroll arrow to display the full list of printers attached to your server.

To cancel the print operation and close the dialog box Click **Cancel**.

Intervals: month vs. calendar month

Accrual policies recognize several types of time period intervals used to check for either grant qualification or expiration. For example, an employee may qualify for a certain grant after a month and lose the grant, or have it expire, if he or she does not use it within a year.

Two types of intervals that are very similar are "month" and "calendar month."

- **Month** — Always a month in length and always occurs on the same day of each month.

  – For instance, if a grant qualifier is defined on the 22nd day of a given month with an interval type of one "month," the interval occurs on the 22nd day of each succeeding month. If the qualifier is defined on April 22, the second "month" interval begins May 22, the third interval begins June 22, the fourth July 22, and so on.

- **Calendar Month** — Begins on the first of each month and ends on the last day of the same month.

  Note: May not be the length of a full month the first time that it occurs.

– For example, if a grant qualifier is defined on April 22 with an interval type of one "calendar month," the second interval begins May 1 - the first day of the next calendar month. The succeeding intervals are all a full month in length - the third interval beginning on June 1, the fourth July 1, and so on.

Configuring Internet Explorer and Adobe Acrobat

To configure Internet Explorer to use the Acrobat product as a helper application instead of as a plug-in, do one of the following, depending on the version of Adobe Acrobat Reader on your system:

• If your system runs Adobe Acrobat Reader v4.05, select **File > Preferences > General**, and ensure that "Web Browser Integration" is *not* selected.

• If your system runs Adobe Acrobat Reader v5.0 or higher, select **Edit > Preferences > Options > Web Browser Options**, and ensure that "Display PDF in Browser" is *not* selected.

Timekeeping reports

Timekeeping report descriptions are in alphabetical order by title.

Notes:
In the system, reports might be listed in one or more different categories. Each report lists the categories in which it appears in the system.

Common options, including **Description**, **People**, **Time Period**, and **Output Format** are not included in Options sections.

Click a report for details:

Absent Employees

Absent Employees is designed to return employees that have an Absence exception in their timecard for the time frame selected in the report criteria.

If an employee receives a pay code edit for part of their shift when they were absent, no Absence exception appears in the timecard, so the employee is not included in the report.

Only absences through the current day appear; future scheduled absences do *not* appear.

Notes:

- To generate an Absence, an employee tracked in the system must have a schedule and no punches that qualify as working for that schedule. Unscheduled employees do not appear on the Absence Report.

- An employee who works part of a scheduled shift and leaves early, does not appear on this report. Working part of the scheduled shift meets the criteria of hours worked in a shift.

Note: This report generates raw, unformatted data about absent employees. The raw data is intended for use with Microsoft Excel. The data is also formatted for display and printing in the Absent Employees report.

Located in:

All

Detail Genie

Options

Absences — You can choose the type of absences to include in the report: Unexcused Only, Excused Only, Both, or None. The default is Unexcused Only.

Report content

- **Absence Type** — Either excused or unexcused.
- **Pay Code** — The pay code that is associated with the hours for which the employee is absent.
- **Excusing Pay Code** — The pay code that is assigned to the absence.

  Note: Absence pay codes excuse the absence and apply the correct time or money to the absence. The pay code is marked with an asterisk (*****) if the absence has been excused by the pay code edit.

- **Time** — The amount of time that is applied to the pay code.
- **Money** — The amount of money that is applied to the pay code.
- **Absence Day/Date** — The day and date on which the absence occurred.
- **Comment** — Text that is attached to the excusing pay code edit.
- **Total Number of Employees** — The number of employees listed in the report.

Accrual Balances and Projections

Accrual Balances and Projections shows accrual balances through a selected date along with future takings, credits, and projected balances for each employee contained in the report.

The projected balances are calculated out through the furthest projected taking date, or the date furthest into the future that the employee is scheduled to use accrued time.

The information in this report can be used to determine if an employee has accrued enough time for a vacation.

The global setting, `global.reporting.accruer.lookbackdays`, is used by both the Accrual Detail and the Accrual Balances and Projections reports. It defaults to two years. To run either of those reports for time frames more than two years ago, increase the setting appropriately.

Note: This report produces raw, unformatted data about accrual balances and projections. The raw data is intended for use with Microsoft Excel. The data is also formatted for display and printing in the Accrual Balances and Projections report.

Located in:

All

Accruals

Detail Genie

Scheduler

Options

None

Report content

- **Employee Name and ID** — The name and ID number of each employee included in the report.

- **Accrual Code** — The category in which time or money accrues, such as sick, personal, or vacation.

- **Accrual Type —** The type of amounts that accrue in the accrual code, either hours, days, or money.

- **Period Ending Balance** — The balance for the accrual code as of the end of the pay period containing the selected date.

- **Furthest Projected Taking Date** — The date furthest into the future that the employee is scheduled to use accrued time.

- **Projected Takings** — The amount of time or money that the employee is scheduled to take between the selected date and the furthest projected taking date.

- **Projected Credits** — The amount of time or money that the employee is scheduled to earn between the selected date and the furthest projected taking date.

- **Projected Balance** — The current balance minus all projected takings and plus all projected credits up through the furthest projected taking date. This balance includes any scheduled resets.

- **Balance w/o Proj. Credits** — The period ending balance minus any scheduled credits. This balance ignores scheduled resets.

- **Total Number of Employees** — The number of employees who are included in the report. If data is not current for all employees, a message appears at the beginning of the report that indicates the number of employees who are not up to date.

Accrual Carryover Limits

Accrual Carryover Limits lists all the carryover limits that are configured in Setup.

A carryover limit defines the amount of accrued time or money that can be rolled from one interval period to the next.

Located in:

All

Accruals

Configuration

Options

None

Report content

- **Carryover Limit —** The name of the accrual carryover limit as defined in Setup.
- **Date Pattern** — The interval of time that defines when carryover occurs. For example, "the first day of every year" or "the seventh day of every pay period."
- **Limit Type** — Either minimum or maximum.

  Indicates whether the limit defines a maximum amount for carryover or a minimum amount that must be carried over.

- **Forgives Negative Balances** — Either yes or no.

  Defines whether a negative balance can be cleared from the account and the balance reset to zero when carryover occurs.

- **Total Number of Accrual Carryover Limits** — The total number of accrual carryover limits listed in the report.

Accrual Codes

Accrual Codes lists, by type, all of the accrual codes that are configured in Setup.

Accrual codes are the accounts that identify and hold accrual balances, such as vacation, sick, or bonus.

Located in:

All

Accruals

Configuration

Options

None

Report content

- **Type** — The type of amounts that accrue in the accrual code, either hours, days, or money.
- **Name** — The name of the accrual code.
- **Abbreviation** — The accrual code abbreviation as defined in Setup.
- **Allow Manual Edit** — Either yes or no.

  Specifies whether editing is allowed on existing accrual codes.
- **Hours Per Day** — The number of hours that constitute a day (for Day type Accrual Codes only).
- **Display on Totals & Schedules tab in TCE** — Either yes or no.

  If yes, the accrual balance appears within the Totals & Schedules tab in the Timecard Editor.

- **Reporting Period** — The time frame of the report data.
- **Total Number of Accrual Codes** — The total number of accrual codes listed in the report.

Accrual Date Configurations

Accrual Date Configurations lists all the site-wide and person-specific dates that are configured in Setup.

Site-wide dates are company dates and do not vary by person. For example, a company-paid holiday or a company's fiscal start date.

A person-specific date could be a 401K Enrollment Date that starts on the person's Date of Hire (reference date).

Located in:

All

Accruals

Configuration

Options

None

Report content

- **Accrual Date Name** — The name of date configuration as defined in Setup.
- **Date Referenced** — The date field (such as a person's date of hire) or specific date to which the accrual date name refers.
- **Total Number of Accrual Date Configurations** — The total number of accrual date configurations that are configured in Setup.

Accrual Date Patterns

Accrual Date Patterns lists the accrual date patterns that are configured in Setup.

Accrual date patterns are predictable sequences of dates that determine when to adjust accrual balances. For example, the first of every year or the seventh day of every pay period are date patterns. Fixed grants, earned grants, earning limits, carryover limits, and probation periods can use date patterns in their definitions.

Located in:

All

Accruals

Configuration

Options

None

Report content

- **Date Pattern** — The name of the date pattern. The report is sorted by date pattern name.
- **Frequency** — The interval between occurrences of the date pattern.
- **Interval Type** — The unit of time that is applied to the frequency interval. Days, weeks, months, years, and pay periods are all possible interval types.
- **Occur On** — The specific time within the interval for the date pattern to end.

  This is only applicable when the date pattern is not set to end at an exact interval from the reference date. For example, a date pattern might be set to end on the 3rd day of each month.

- **Start** — Used with the Reference Date to determine when the date pattern starts.

  For example, 90 days after the reference date or On reference date exactly.

- **Reference Date** — The date (such as Employee Hire Date) to which the Start date applies.

- **Additional Advance or Delay** — The value that indicates the advance or delay of the start date as specified by the offset date pattern. A positive value delays the start date and a negative value advances the start date.

- **Date Pattern** — The name of the date pattern that applies to the additional advance or delay.

- **Expected Hours Worked for Full Time Employees** — The number of hours that an employee must work to qualify for the accrual in the Accrual Date Pattern.

- **Total Number of Accrual Date Patterns** — The total number of accrual date patterns that are configured in Setup.

Accrual Debit Activity Summary

Accrual Debit Activity Summary shows a summary of accrual takings for each employee who is included in the report. This report also includes a daily breakdown of accrual debits for each employee and the total number of accrual debits for all employees contained in the report.

This report helps managers identify trends, for example, how often an employee is sick on Mondays.

Located in:

All

Accruals

Detail Genie

Scheduler

Timecard

Options

None

Report content

- **Accrual Code** — The accrual category from which time or money is debited, such as sick, personal, or vacation time.

- **Day of Week** — The day of the week on which the debit to the accrual balance occurred.

- **Effective Date** — The date on which the debit occurred.

- **Amount** — The amount of the accrual debit transaction.

- **Pay Code that Affected Accrual** — The name of the pay code that is associated with the accrual debit.

- **Number of Accrual Debits Taken On** — The number of debits taken on each day of the week for the selected time period.

- **Total Number of Employees —** The number of employees who are included in the report.

- **Total Number of Accrual Debits** — The total number of accrual debits that are included in this report.

Accrual Debit Activity with Graph

Accrual Debit Activity with Graph includes a daily breakdown of accrual takings, as well as a breakdown by accrual code, for all employees included in the report, both collectively and individually. The accompanying graphs show the number of accrual takings by day.

This report helps managers identify trends, for example, what days are employees most likely to call in sick.

Located in:

All

Accruals

Detail Genie

Scheduler

Options

None

Report content

- **Day of Week** — The day of the week on which the debit to the accrual balance occurred.

- **Number of Accrual Debits** — The number of accrual debits on the given day.

- **Accrual Code** — The accrual category from which time or money is debited, such as sick, personal, or vacation time.

- **Number of Debits** — The number of accrual debits associated with the given accrual code.

- **Amount** — The amount of money or hours debited from the given accrual code.

- **Units** — The unit of measure for the amount debited from the given accrual code.

- **Total** — The total number of accrual debits included in the report, either for all employes or for an individual employee.

- **Total Number of Employees** — The total number of employees summarized in the report.

Accrual Detail

Accrual Detail 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.

Notes:

This report includes scheduled accrual amounts.

This report produces raw, unformatted data about accruals. The raw data is intended for use with Microsoft Excel. The data is also formatted for display and printing in the Accrual Detail report.

A new setting on the Global Values tab in System Settings, **global.reporting.accruer.lookbackdays**, specifies the number of days in the past that Accruals looks for a starting balance transaction for auditing and detail reporting. The default is 730 days, which you can modify to see more than two years' worth of data.

Located in:

All

Accruals

Detail Genie

Scheduler

Timecard

Options

None

Report content

- **Employee Name and ID** — The name and ID number of each employee included in the report.

- **Accrual Code** — The accrual category in which time or money is debited or credited, such as sick, personal, or vacation time. The accrual type is also displayed (either hours, days, or money).

- **Effective Date** — The day of the week and date on which the accrual transaction became effective.

- **Action** — The type of accrual transaction that occurred. This could be a group edit, a taking, a grant, a balance forward, or an adjustment.

- **Amount** — The amount of time or money that is attributed to the accrual transaction.

- **Running Balance** — The balance that results from each accrual transaction shown. The accruals data may include a combination of probationary and vested amounts.

- **Pay Code** — The pay code name that is associated with the accrual transaction, if any.

- **Source** — The component where the transaction was initiated, such as Scheduler, People Editor, and so on.

- **Edit Date** — The date that the accrual transaction was first entered or scheduled.

- **Edited By** — The person who initiated the accrual transaction.

- **Total Debits** — The total amount in accrual debits per accrual code per employee.

- **Total Credits** — The total amount in accrual credits per accrual code per employee.

- **Total Number of Employees** — The number of employees who are included in the report. A message appears at the beginning of the report if data is not current for all employees included.

Accrual Earned Grants

Accrual Earned Grants shows the configuration of all the accrual earned grants that are configured in Setup.

An earned grant defines how and when accrual amounts that must be earned are given out.

Located in:

All

Accruals

Configuration

Options

None

Report content

- **Earning Pay Code —** The pay code in which an employee must work to earn this grant.

- **Grant on Date Pattern** — The date pattern that defines the interval at which the grant is earned.

- **Grant Qualifiers** — The grant qualifier that tests for specific conditions, such as the minimum number of days worked or the maximum number of hours worked in a pay code before granting the accrual.

  – **Pay Code** — The pay code used in the grant qualifier. For example, the qualifier "Hours charged to Pay Code" requires a pay code with a certain amount of hours applied before a grant is given.

  – **Required Minimum/Maximum** — The minimum or maximum amount that is used by the grant qualifier.

- **Check condition over last Qty** — The amount that defines when to test the condition.

- **Check conditions over last Interval Type** — The interval type that defines when to test the condition.

- **Check condition number of times Qty** — The number of consecutive times in a row that the condition is to be met.

- **Grant in Increments** — The rules for granting and carrying over increments.

- **Only apply for increments of** — The minimum amount of the grant that can be earned.

- **Carry over partial increments** — Either yes or no. Indicates whether or not remaining time from a grant is tracked or discarded.

- **Reset Partial Increments on** — The date pattern that defines the interval at which carried over partial increments are deleted.

- **Grant Expiration Time Period** — The rules for expiring the grant.

- **Grant Expires** — Either yes or no. Indicates whether the grant will expire.

- **Grant Expires Value** — The interval at which the earned grant expires.

- **Total Number of Accrual Earned Grants** — The total number of earned grants that are configured in the Setup.

Accrual Earning Limits

Accrual Earning Limits shows the configuration of all the earning limits that are configured in the Setup.

Earning limits either limit an accrual balance or limit how the amount of an accrual balance can grow. For example, an earning limit named Vacation Limit specifies that the total vacation balance cannot exceed 120 hours.

Located in:

All

Accruals

Configuration

Options

None

Report content

- **Earning Limit —** The name of the earning limit.
- **Limit Type** — Either Balance limit, Maximum earned amount limit, or Relative cap of earnings minus takings. Indicates how an accrual amount can grow.
- **Frequency of Limit Checking** — The number of times that the system checks to determine if limits are met, such as checking the limit over a seasonal time period.
- **Interval/Seasonal Time Period/Date Pattern** — The time period when earning limit processing adjusts the accrual balance.
- **Total Number of Earning Limits** — The total number of earning limits that are configured in Setup.

Accrual Fixed Grants

Accrual Fixed Grants shows the configuration of all the fixed grants that are configured in Setup.

A fixed grant defines how and when accrual amounts that are granted at specified intervals are given out. For example, according to one company's accrual policy for vacation time, full-time employees accrue 10 hours per month.

Located in:

All

Accruals

Configuration

Options

None

Report content

- **Grant Date Pattern** — The date pattern that is used to determine when to apply the grant.

- **Grant on date 1 only** — Either yes or no. Specifies that the grant is a one-time grant. After one interval, the grant stops automatically.

- **Part Time Granting/Apply as Ratio Grant for part-time employees** — Either yes or no. Indicates whether the grant will be prorated (the amount multiplied by the employee's part-time ratio).

- **Increase rates for extra hours and Worked Pay Code** — Either yes or no. Specifies whether employees receive a larger grant if they works more hours than expected during a grant's date pattern.

- **Grant Qualifiers** — The grant qualifier that tests for specific conditions, such as the minimum number of days worked or the maximum number of hours worked in a pay code before granting the accrual.

- **Type of Qualifier(s)** — The type of qualifier that is assigned to the fixed grant. For example, Days Active, Days Worked, and Days Employed are qualifier types.

- **Pay Code** — The pay code that is used in the grant qualifier. For example, the qualifier Hours charged to Pay Code requires a pay code.

- **Required Minimum/Maximum** — The required minimum and maximum amount or level that qualifies the condition.

- **Check Condition over last Qty —** The amount that defines when to test the condition.

- **Interval Type** — The interval type that defines when to test the condition.

- **Times Qty** — The number of times that are specified to test the qualifier.

- **Grant Expiration Time Frame** — Indicates whether the grant expires and at what interval.

- **Total Number of Accrual Fixed Grants** — The total number of accrual fixed grants that are configured in Setup.

Accrual Policies

Accrual Policies shows the configuration of all the accrual policies that are configured in Setup. The grouping of information in the report reflects the tabs in the Edit Accrual Policy dialog box in Setup.

Accrual policies define how and when accrual balances associated with an accrual code are credited and debited. An accrual policy controls how people accrue time, money, or both.

Located in:

All

Accruals

Configuration

Options

None

Report content

- **Accrual Policy Name** — The accrual policy name appears at the top of each page.
- **General:**
  - **Accrual Code** — The accrual category in which time or money is debited or credited, such as sick, personal, or vacation time.
  - **Probation Period** — Specifies the length of time during which accrual balances are earned but cannot be taken or paid.
  - **Accrual Code for Overflow** — The accrual category for accrual amounts that are lost when carryover and earning limits adjust accrual balances.
  - **Date Pattern for Milestones** — The date pattern that specifies when milestones occur and when preset amounts change for grants and limits.

- **Grants and Limits:**
  - **Fixed Grants** — The names of the fixed grants that are defined for this accrual policy.
  - **Earned Grants** — The names of the earned grants that are defined for this accrual policy.
  - **Earning Limits** — The names of the earning limits that are defined for this accrual policy.
  - **Carryover Limits** — The names of the carryover limits that are defined for this accrual policy.
  - **Milestone** — Indicates when the grant or limit is applied.
  - **Amount/Rate** — Indicates the accrual amount or rate that is associated with a grant or limit.
  - **Expires to Code** — The name of the pay code to which expired accrual grants are moved.
- **Taking Rules:**
  - **Taking Limits** — The names of the taking limit rules for this accrual policy.
  - **Warning Level** — The taking amount that triggers a warning and requires manager approval.
  - **Disallow Level** — The taking amount that when exceeded disallows pay code edits, group edits, or imported accrual decrements for predefined taking limits.
  - **Pay Codes that cause deductions to the Accrual Code** — The pay codes that debit the balance of the accrual code that is associated with this accrual policy.
  - **Deduct day from accrual balance —** Specifies how a day is defined in the accrual policy, either as fixed number of hours or "Based on schedule."
  - **Transactions in increments of** — The required increment for taking accrued time or money.
  - **Minimum per transaction** — The smallest allowed taking amount.

- **Overdrafts**:
    - **Past or Present Overdraft Warn Amount** — The overdraft amount that triggers the system to send a warning.
    - **Past or Present Overdraft Disallow Amount —** The overdraft amount at which the system disallows the edit.
    - **Past or Present Overdraft Balance Used —** Either present balance or effective date balance. Present balance allows earnings in the past to offset overdrafts in the past.
    - **Future Overdraft Warn Amount** — The overdraft amount that triggers the system to send a warning.
    - **Future Overdraft Disallow Amount** — The overdraft amount at which the system disallows the edit.
    - **Override restrictions during Import** — Either yes or no.
    - **Override restrictions during Group Edits** — Either yes or no.
- **Total number of Accrual Policies** — The total number of accrual policies that are configured in Setup.

Accrual Pool Balances

Accrual Pool Balances shows balances for each of the accrual pools as of the date and time that the report is run.

Located in:

All

Accruals

Options

None

Report content

- **Pool Accrual Code —** The category in which time or money accrues, such as sick, personal, or vacation time.
- **Type** — The type of accrual balance that is held in the pool. An accrual type can be days, hours, or money.
- **Balance** — The accrual balance that is remaining in the accrual pools as of the date and time that the report is run.

Accrual Probation Periods

Accrual Probation Periods shows the configuration of all the accrual probation periods that are configured in Setup.

Accrual probation periods determine how long before accrued time or money can be used. For example, most companies have a probation period for new hires. During this probation period, the person accrues vacation time but cannot use the time.

Located in:

All

Accruals

Configuration

Options

None

Report content

- **Probation Rule Type —** The accrual probation periods are divided into two types, either Single Probation Period or Recurring Probation Period.

- **Probation Rule Name —** The name of the accrual probation period.

- **End Date** — The date pattern or number of intervals of a date pattern that marks the end of the probation period.

- **Total number of Accrual Probation Periods —** The total number of accrual probation periods that are configured in Setup.

Accrual Profiles

Accrual Profiles shows the accrual profiles that are configured in Setup.

An accrual profile is a collection of accrual policies that can be applied to similar groups of employees. For example, you could assign the same profile to all full-time employees and a separate profile to all part-time employees. The profile assigned to full-time employees would include accrual policies configured for full-time employees and the profile assigned to part-time employees would include accrual policies configured for part-time employees.

Located in:

All

Accruals

Configuration

Options

None

Report content

- **Type** — The accrual profiles are divided into two types, either Basic or Calculated.
- **Name** — The name of the accrual profile.
- **Pool Accrual Code** — The accrual code that holds accrued time or money that is not associated with an individual employee. Accrual balances can be transferred from an employee to an accrual pool, or from an accrual pool to an employee.
- **Policy** — The accrual policies that make up the definition of the accrual profile.
- **Visible/Hidden** — Indicates whether the accrual policies are visible or hidden in the timecard and the My Accrual Balances and Projections report.

- **Total Number of Accrual Profiles** — The total number of accrual profiles that are configured in Setup.

Accruals (Spreadsheet Export)

Accruals display a line by line listing of each employee's accruals.

Located in:

All

Accruals

Timecard

Options:

None

Report content:

Reporting period — The time period for which balances are reported.

Accrual Code — Name and unit of each accrual code, for example, Personal and Day.

Balances — Balance associated with each accrual, including Opening Balance, Earned to Date, Taken to Date, Available Balance, and Ending Balance.

Probationary — Balances for employees currently on probation.

Prior Ending — Balances for Prior Ending Probationary, Vested, and Balance.

Accrual Summary

Accrual Summary shows a summary of accrual activity by employee for the selected time period. It includes the starting and ending balances for the following:

- Each accrual code
- Credits
- Debits
- Resets in between.

Located in:

All

Accruals

Detail Genie

Scheduler

Timecard

Options

None

Report content

- **Accrual Code —** Category in which time or money accrues, such as sick, personal, or vacation time.
- **Starting Date (*Reset)** — The day of the week and date of the first day of the selected time period.

  Note: If the date contains an asterisk (*), the date is the effective reset date for the accruals.

- **Starting Balance** — The accrual balance as of the starting date or reset (balances established by a reset are marked with an asterisk). Any balance within the brackets indicates amounts earned during a probation period.

- **Earnings and Credits** — The amount of earnings or credits that are added to the starting or reset accrual balance to produce an ending or interim balance.

- **Takings and Debits** — The amount of takings or debits that are deducted from the starting or reset accrual balance to produce an ending or interim balance.

- **Ending Balance** — The accrual balance as of the last day of the selected time period. Any balance within the brackets indicates amounts earned during a probation period.

- **Total Number of Employees** — The number of employees who are included in the report.

Accrual Taking Limits

Accrual Taking Limits shows the configuration of all the accrual taking limits that are configured in Setup.

Accrual taking limits control the amount of accrued time or money that an employee can take within a specified length of time.

Located in:

All

Accruals

Configuration

Options

None

Report content

- **Taking Limit —** The name of the taking limit as defined in Setup.

- **Method of testing limit** — Specifies whether the taking limit is tested over a seasonal time period, continuously over a rolling time period, or at specified times defined by a date pattern.

- **Interval/Seasonal Time Period/Date Pattern** — The time period to which the taking limit applies.

- **Total Number of Taking Limits** — The total number of taking limits that are configured in Setup.

Adjustment Rules

Adjustment Rules lists adjustment rules configured in the system.

Located in:

All

Configuration

Options

None

Report content

- • **Name** — The name of the adjustment rule.
- • **Description** — The description of the adjustment rule.
- • **Effective Version Dates** — The dates during which the adjustment rule is effective.

Auto-Resolved Exceptions

Auto-Resolved Exceptions lists the auto-resolved exception rules defined in Setup, including the default exceptions that are selected for a rule.

Located in:

All

Configuration

Options

None

Report content

- **Name** — The name of the Auto-Resolved Exception rule.
- **Description** — The description of the Auto-Resolved Exception rule.
- **Late in Duration Pay code** — Lists the name of the duration pay code for this exception, if one is included in the rule.
- **Early Out Duration Pay code** — Lists the name of the duration pay code for this exception, if one is included in the rule.
- **Long Break Duration pay code** — Lists the name of the duration pay code for this exception, if one is included in the rule.
- **Unexcused Absence Duration Pay code** — Lists the name of the duration pay code for this exception, if one is included in the rule.
- **Core Hours Duration Pay code** — Lists the name of the duration pay code for this exception, if one is included in the rule.
- **Active** — Indicates whether the rule is active.
- **Total Number of Auto-Resolved Exceptions** — The number of Auto-Resolved Exception rules reported.

Badge Numbers

Badge Numbers lists active and inactive employee badge numbers along with the employee who is assigned to the badge. Employees with active badge numbers appear first, followed by employees with inactive badge numbers.

Note: The time period that you choose for this report applies to the HyperFind query and adjusts the employees included in the report rather than the dates on which the report is based. The badge numbers are listed as either active or inactive based on their status as of the current day.

Located in:

All

Detail Genie

Options

None

Report content

- **Badge Number** — The active or inactive badge number.

  Note: Only badge numbers that are assigned to an employee appear in the report.

- **Activated** — The date that the badge number became activate.
- **Inactivated** — The date that the badge number became inactivate (if applicable).
- **Employee Name** — The name of the employee who is assigned to the badge number.
- **Employee ID** — The ID of the employee who is assigned to the badge number.

- **Total Number of Active Badges** — The total number of active badge numbers that are included in the report.

- **Total Number of Inactive Badges** — The total number of inactive badge numbers that are included in the report.

Biometric Enrollment Activity

Biometric Enrollment Activity helps you track the biometric enrollment progress. The report shows the number of employees who were enrolled at each Series 4000 device on the date or dates that you specify. If you specify a range of dates, the information is organized by date.

Note: This report does not include employee names.

Located in:

All

Biometrics

Options

None

Report content

- • The Biometric Enrollment Activity report contains two sections:
    - – **Summary by Date section** — Shows the number of employees enrolled at each enrollment location (Series 4000 device and the associated device group), on the specified day or days. This section also shows a sub-total of employees who were enrolled on each day, and a grand total of all of the employees who were enrolled during the report time frame.
    - – **Summary by device** — Shows the number of employees enrolled at each enrollment location (Series 4000 device and the associated device group). This section also shows a grand total of all the employees who were enrolled during the reporting time frame.

Biometric Enrollment Detail

Biometric Enrollment Detail enables managers to view detailed information about employees' enrollment statuses.

Located in:

All

Biometrics

Options

None

Report content

- **Employee** — Employee name.
- **ID** — Employee number.
- **Biometric Employee?** — Whether the employee is designated to be enrolled for biometric verification.
- **Enrolled?** — Whether the employee is enrolled for biometric verification.
- **Enrollment Location** — At which Series 4000 device the employee *is* or *was* enrolled

  or

  The IP address of the timekeeping server, if the employee was unenrolled using the Biometrics workspace in the People Editor.
- **Manager** — Employee's manager
- Summary totals for the following information are presented at the end of the report:
  - Total number of employees (in the database)
  - Biometric employees

- Biometric Employees who are *not* enrolled
- Enrolled Biometric Employees

Other Information:

The information on the report reflects the employees' *current* enrollment status, regardless of the time period that you specify when you run the report.

It is possible for an employee to be associated with an enrollment location, but not be currently enrolled. In those cases, the enrollment location indicates that the employee was enrolled in the past, but then was *unenrolled* at the indicated location.

If you have privileges to create HyperFind queries, you can create a query that filters out employees who are not designated for biometric enrollment. This causes the report to include only employees who must enroll, and who satisfy all of the other query criteria.

Biometric Enrollment Summary

Biometric Enrollment Summary is useful for managers to view how the overall enrollment of employees is progressing.

Located in:

All

Biometrics

Options

None

Report content

- Total number of employees (in the database)
- Biometric employees
- Biometric Employees who are *not* enrolled
- Enrolled Biometric Employees

Bonus/Deduction Rules

Bonus/Deduction Rules shows all the bonus and deduction rules that are configured in Setup.

Bonuses and deductions are amounts of time or money that are automatically added to or subtracted from an employee's timecard; they are part of an employee's work rule.

Located in:

All

Configuration

Options

None

Report content

- **Triggered By** — Indicates which item triggers a bonus or deduction, such as a pay code change, a limit, or the length of a shift.

- **Shift Length to Trigger** — The maximum or minimum length of a shift that initiates the bonus or deduction.

- **Trigger if Locator is** — Defines a locator value and sets criteria for triggering the bonus or deduction based on the time that the locator is reached. Includes the following:

    - **Locator** — An amount of time in hh:mm format.

    - **At or After** — If the deduction must be taken within a specific time period after the beginning time.

    - **Before** — If the bonus or deduction must be taken within the specific time period before the ending time.

- **Name —** The name of the bonus/deduction rule that is defined in the corresponding row.

- **Amount** — The money or time amount for the bonus or deduction.

- **Include When Canceling All** — Indicates whether this rule is canceled when canceling all bonus/deduction rules.

- **Cancel if Break Taken** — Either yes or no. Indicates whether the amount will be applied if a break was taken.

- **Shift Restriction** — Indicates if the employee must start by a certain time and/or work until a selected time. The report shows the Must Start by and Must Work Until values. The duration of each of these types of restrictions appears on the Punch Interpretation Rules report.

- **Pay Code** — The pay code for the bonus or deduction.

- **Applies On —** The days to which the bonus or deduction rule applies.

- **Is Exception** — Either yes or no.Indicates whether this bonus generates a Bonus exception, which can appear in the timecard, Genies, and reports

  For Length of Shift only:

  – **Use rounded shift boundary times** — Indicates if the system is configured to ignore the rounding rules when interpreting punches.

  – **Short break exception disqualifies break** — Indicates if the system is configured to implement the rule that states: If an employee's break is cut short, the entire break is disqualified and the employee receives bonus pay as compensation.

  – **Minimum qualifying interval —** The shortest contiguous block of time that employees can be required to work without qualifying for a break. If the shift length equals or is greater than the minimum interval, the shift qualifies for the bonus.

- **Associated with Work Rule(s)** — The work rules that contain the bonus or deduction rule being described.

- **Total Number of Bonus/Deduction Rules** — The total number of bonus and deduction rules that are configured in Setup.

Brazilian Timecard Mirror

The Brazilian Timecard Mirror contains information for all punches in the system including company name and number, address, employee PIS or social security number, employee hire date and the report has two sections: Contractual Employee Schedules and Punch Detail.

Located in:

All

Timecard

Options

Time Period — You can select the reporting period, such as Current Pay Period, or Week to Date.

Output Format — The format in which the report will be generated.

Select Microsoft Excel Document(.xls) for a report optimized for use in Excel. Otherwise select Adobe Acrobat Document(.pdf).

Break Rules

Break Rules shows all the break rules that are configured in Setup. The report is formatted by the name of the break rule.

Located in:

All

Configuration

Options

None

Report content

- **Maximum Length** — The maximum amount of time that a person can punch out during a shift and still have the next punch recognized as the return in-punch for that shift.

- **Paid Amount** — The amount of time for which employees are paid for this break.

- **Exception Limits** — Indicates the threshold for identifying short and long breaks.

- **Break Starts** — The amount of time an employee must work at or after and before the break starts.

- **Relative To** — When a break rule is applied to a time, such as midnight.

- **Normal Length** — The normal, or expected, length of the break.

- **Short Break Round/Grace —** The rounding rule and grace period allowed before deducting for the short break.

- **Normal Length** — The length of a normal break.

- **Medium Break Round/Grace** — The rounding rule and grace period allowed before deducting for the medium break.

- **Change Point** — Indicates when the break round and grace rules are applied.
- **Long Break Round/Grace** — The rounding rule and grace period allowed before deducting for the long break.
- **Use Unscheduled Punch Rounding** — Yes or No. When Use Unscheduled Punch Rounding is Yes, unscheduled transfer punch rounding is used instead of interval rounding for break punches.
- **Associated with Work Rules** — The work rules that contain the corresponding break rule.
- **Total Number of Break Rules** — The total number of break rules that are configured in Setup.

Cascading Policies

Cascading Policies shows the Cascading policies defined in Setup.

Located in:

All

Configuration

Options

None

Report content

- **Policy Name** — The name of the Cascading policy.
- **Description** — The description of the Cascading policy.
- **Active —** Indicates whether the policy is active and available for use; can be Yes or No.
- **Cascading Pay Code** — The pay code associated with the policy.
- **Disregard taking limits in accrual policy** — Indicates whether the cascading policy should bypass all taking limits specified in the accrual policies for all of the accrual codes used in the policy.
- **Apply uncascaded balance to** — Specifies the pay code to which any leftover balance is applied after all other pay code takings have been exhausted.

- **Pay Code** — Lists the pay codes included in the cascading policy.The first pay code is the pay code that is the first pay code that time is taken from when this cascading policy is used. Any subsequent pay codes saved in the policy after that are drawn from in the order in which they appear in the Policy listing.

- **Accrual Code** — Lists the accrual codes associated with the takings. Typically, the system selects the accrual code when the pay code is selected.

Cascading Profiles

Cascading Profiles lists the Cascading profiles defined in Setup.

Located in:

All

Configuration

Options

None

Report content

- **Profile Name** — The name of the policy.
- **Description** — The description of the policy and how it is used.
- **Active** — Indicates whether the policy is currently active; can be Yes or No.
- **Policy Name** — The name or names of the Cascading policy or policies included in the Cascading profile.

Combined Pay Codes

Combined Pay Codes shows the combined pay codes that are configured in Setup.

A combined pay code is a single pay code that represents the total of a selected group of pay codes. The pay codes represented by the combined pay code are listed in the report along with the corresponding combined pay code.

Located in:

All

Configuration

Options

None

Report content

- **Pay Code** — The name of the pay code, be it the combined pay code or one of the pay codes contained within the combined pay code. The name of a combined pay code is shown in bold letters.
- **Code Number** — The pay code number for the pay code.
- **Short name** — The shortened name of the pay code, which appears in the timecard editor and other components.
- **Visible on Totals tab in Timecards** — Either yes or no. Indicates whether totals for this pay code are shown in the totals area of the timecard.
- **Display As** — Indicates whether this pay code holds time or money amounts.
- **Visible in totals columns of Timecard's main area** — Indicates if a pay code edit using this pay code adds edited hours with worked hours in the main area of the timecard.

- **Edit Excuses Absence** — Indicates whether a pay code edit using this pay code excuses an absence and removes a person from the absence. For example, a pay code edit of allowed sick time might excuse an absence that was previously unexcused.

- **Edits Count Toward Overtime Limits** — Indicates whether a pay code edit using this pay code is added to the appropriate overtime limits.

- **Edits Count Toward Consecutive Date OT** — Indicates whether a pay code edit using this pay code is added to the count toward the minimum hours requirement for a day in order for that day to count toward consecutive days of overtime.

- **Edits Repeat on Sched. Days** — Indicates whether a pay code edit using this pay code is repeated for scheduled days until another edit is performed.

- **Add** — The amount of money added to a person's base wages each hour for this pay code. This option is only available for pay codes that hold time.

- **Multiplier** — The factor used to calculate a person's wages for this pay code. This factor determines whether an employee's time in this pay code is taken at the flat wage rate (multiplier of "1") or at a greater or lesser wage rate. This option is only available for pay codes that hold time.

- **Start** — The effective start date for this pay code.

- **End** — The end date for this pay code.

- **Scheduled Hours Type** — Indicates how the hours from this pay code are classified in the scheduler. The scheduled hours type determines whether the hours are added to the number of total scheduled hours in the scheduler. For example, a scheduled vacation might not be included in the total scheduled hours.

- **Affects Availability** — Either yes or no. Indicates whether the pay code is set up to affect availability.

- **Visible in the main area of Timecard and Schedule, on Hours Summary tab in Schedule, and in associated Reports** — Yes or no. Indicates whether combined pay code information shows in timecard, schedules, and reports.

- **Visible in Report Options and Report Totals** — Either yes or no. Indicates whether combined pay codes show in report options and totals.

- **Total Number of Combined Pay Codes** — The total number of combined pay codes that are configured in Setup.

Comments

Comments shows the comments that are configured in Setup. The comments are grouped by category, such as Pay Codes and Punches.

Located in:

All

Configuration

Detail Genie

Timecard

Options

None

Report content

Category — The category in which the comment is available.

Name — The text of the comment.

Code — The code number associated with the comment.

Activated — Either yes or no. Indicates whether the comment can be used in the application.

Total Number of Comments — The total number of comments that are configured in Setup.

Comprehensive Audit Report (Spreadsheet Export)

Comprehensive Audit (Spreadsheet Export) shows audit information for timecard editor actions, including the date and time of the action, who performed the action, and what information has changed.

Located in:

All

Timecard

Options

None

Report content

Audit Type — Displays the type of edit performed, such as Add Punch or Edit Punch, Add Punch [Mark as Resolved], Edit Punch [Mark as Resolved] or Edit Punch [Unmark as Resolved], or Approvals and Sign-offs.

Edit Date and Time — The date and time to which the edit applies.

Historical Effective Date — The Historical Effective date to which the a historical correction is applied. The Historical Date is the date that was edited in the previous pay period.

The report also displays a number of columns in which edits might have occurred. They include:

• Approval Start Date/Approval End Date

• Approval End Date

• Original Punch Time/Changed Punch Time

• Original Labor Account/Changed Labor Account

• Original Org Job/Changed Org Job

• Original Work Rule/Changed Work Rule

- Original Paycode/Changed Paycode
- Original Paycode Time/Changed Paycode Time
- Original Paycode Amount/Changed Paycode Amount
- Override
- Original Cancel Deduction
- Comment
- User
- Server
- Client
- Data Source

Core Hours Rules

Core Hours Rules lists the core hours rules that are configured in Setup.

Core hours rules define specific ranges of time during which employees are expected to work.

Located in:

All

Configuration

Options

None

Report content

Name — The name of the rule.

Description — The description of the rule that was entered during setup.

Start — The time that the core hours period begins.

End — The time that the core hours period ends.

Break is a Violation — Either yes or no. Indicates whether an employee is allowed to take a break during the core hours period.

Days of Week — The days of the week that the core hours period is in effect.

Total Number of Core Hours Rules — The number of core hours rules that are configured in Setup.

Daily Rest

Daily Rest shows the length of rest periods taken by each of the employees in the report and allows you to compare those with the minimum amount of uninterrupted rest required per day.

Note: Employees cannot opt out of the minimum requirements for daily rest, as they can for some of the other Working Time Directive rules.

Located in:

All

Working Time Directive

Options

Each Working Time Directive rule includes default settings for the options that are used to generate Working Time Directive reports. You can override the default settings for the following option:

Report content — Choose to include all employees or only those with exceptions.

Report content

- **Employee Name** — The name of the employee.
- **ID** — The ID number of the employee.
- **Home Account** — The primary labor account assigned to the employee during the selected time period.
- **Young/Adult** — Indicates whether the employee is classified as an adult or a young worker.
- **Daily Minimum Rest** — The minimum amount of uninterrupted rest required per day for the employee.

- **Date/Time Out** — The start of the uninterrupted rest period.
- **Date/Time In** — The end of the uninterrupted rest period.
- **Actual Rest Length** — The length of the uninterrupted rest period.
- **Rest Break Less Than Limit** — Indicates whether the given rest length is less than the limit assigned by the Working Time Directive rule. If data is not available for the given day, this column will include an ID (Insufficient Data) flag.

Note: Hours added as a pay code edit are appended to the first shift of the day. It is important to note that hours attributed to excluded pay codes (for example, annual leave) do not count as rest.

Device Assignments

Device Assignments shows the configuration of Device Manager devices.

Note: Device Manager must be installed on your Web server to view this report.

Located in:

All

Configuration

Data Collection

Options

None

Report content

- **Device ID** — The identifying number of any piece of electronic equipment that is used to collect employee time and activity inputs.
- **Device Name** — The name that is assigned to a specific device.
- **Device Configuration Profile —** The device configuration profile assigned to the device and the major building blocks assigned to the profile.
- **Device Enabled?** — Either yes or no. Indicates if the device is active.
- **Belongs to Device Group** — The name of the group that the device belongs to. A Device Group categorizes a specific function, location, department, or any other logical grouping that is used to organize data collection and assign employee lists to devices.

Device Groups and Device Assignments

Device Groups and Device Assignments shows the configuration of Device Manager device groups and their associated devices.

Note: Device manager must be installed on your web server to view this report.

Located in:

All

Configuration

Data Collection

Options

None

Report content

- **Device Group Name** — The name that is assigned to a group of devices that categorize a specific function, location, department, or any other logical grouping used to organize data collection and assign employee lists to devices.

- **Device ID** — The identifying number of any piece of electronic equipment within the Device Group that is used to collect employee time and activity inputs.

- **Device Name** — The names of all devices that are assigned to a specific Device Group.

- **Device Configuration Profile** — The device configuration profile assigned to each device and the major building blocks assigned to the profile,

- **Device Enabled?** — Either yes or no. Indicates if a specific device is active.

Device Work Rule Assignments

Device Work Rule Assignments shows the device work rule assignments that are defined in the Device Manager Setup component.

Note: Device manager must be installed on your web server to view this report.

Located in:

All

Configuration

Data Collection

Options

None

Report content

- **Assignment Name** — The name of the building block that is assigned to an employee in which an device work rule is mapped to a function key on a device.

- **Device Work Rule Definition** — The work rule that is bound to an activity code.

- **Device Work Rule Number** — The number of the device work rule to which the employee is assigned.

Device Work Rule Definitions

Device Work Rule Definitions shows the device work rule definitions that are configured in the Device Manager Setup component. A device work rule enables you to associate a work rule with a pay rule.

Note: Device manager must be installed on your web server to view this report.

Located in:

All

Configuration

Data Collection

Options

None

Report content

- **Device Work Rule** — The number that associates a pay rule with a work rule.
- **Pay Rule** — The set of rules that is used to calculate hours worked by the person.
- **Work Rule and Default Work Rule —** The name of the work rule that applies to the shift when a work rule transfer for the punch, pay code edit, or duration has occurred. A default work rule is the work rule that is normally applied to the work rule transfer when a different work rule has not been applied to the punch, pay code edit, or duration.
- **Associated with building block** — The device work rule building blocks that map device work rules to function keys on a device.

Employee Hours by Job

Employee Hours by Job shows hours for each job in which the employees accrued hours within the selected time period. The hours for each job are organized by pay code.

The report includes totals for each employee, all employees combined, and grand totals by pay code. A special box at the end of the report includes the names of any employees whose data is out of date and the total number of employees who are not up to date.

Use the Employee Hours by Job (Excel) report if you plan to export results to Excel.

Note: The Excel version of this report is not identical to the original version of this report. It contains a subset of the data that is available in the original report.

Located in:

All

Detail Genie

Roll-Up Genie

Options

People — You can select the query for the employees to be included in the report.

Time Period — You can select the reporting period, such as Current Pay Period, or Week to Date.

Actual/Adjusted — You can specify the hours to be reported on, including:

- Hours credited to the selected time period only.
- Hours credited to the selected time period, plus historical edits and corrections made to the period.

Pay Codes — You can choose the pay codes whose hours appear in the report.

Report content

- **Name** — - The name of the employee.
- **ID** — The identification number for the employee.
- **Status** — The current status for the employee (either Active, Inactive, or Terminated) and the date on which the current status became effective.
- **Primary Account —** The labor account to which the employee is assigned.
- **Job** — The name of a job in which the employee accrued time or money.
- **Location** — The organizational location where the job is performed.
- **Pay Code** — The name of the pay code to which the hours or money for the given job was applied.
- **Money** — The amount of money applied to the given pay code for the given job.
- **Hours** — The number of hours applied to the given pay code for the given job.
- **Days** — The number of days applied to the given pay code for the given job.
- **Wages —** The total wages applied to the given pay code for the given job.
- **Total for** — The total money, hours, days, and wages for all pay codes for each employee.
- **Grand Total for all Employees** — The total money, hours, days, and wages for all employees.
- **Grand Total** — The total money, hours, and wages for each pay code included in the report, across all employees and jobs.
- **Total Number of Employees** — The total number of employees who are included in the report.

Employee Hours by Labor Account

Employee Hours by Labor Account shows hours for each labor account in which the employees accrued hours within the selected time period. The hours for each labor account are organized by pay code.

The report includes totals for each employee, all employees combined, and grand totals by pay code. A special box at the end of the report includes the names of any employees whose data is out of date and the total number of employees who are not up to date.

Use the Employee Hours by Labor Account (Excel) report if you plan to export results to Excel.

Note: The Excel version of this report is not identical to the original version of this report. It contains a subset of the data that is available in the original report.

Located in:

All

Detail Genie

Roll-Up Genie

Options

People — You can select the query for the employees to be included in the report.

Time Period — You can select the reporting period, such as Current Pay Period, or Week to Date.

Actual/Adjusted — You can specify the hours to be reported on, including:

• Hours credited to the selected time period only.

• Hours credited to the selected time period, plus historical edits and corrections made to the period.

Pay Codes — You can choose the pay codes whose hours appear in the report.

Report content

- **Name** — The name of the employee.
- **ID** — The identification number for the employee.
- **Status/Date** — The current status for the employee (Active, Inactive, or Terminated) and the date on which the current status became effective.
- **Home Account** — The labor account to which the employee is assigned.
- **Pay Code** — The name of the pay code to which the hours or money for the given labor account was applied.
- **Money** — The amount of money applied to the given pay code for the given labor account.
- **Hours** — The number of hours applied to the given pay code for the given labor account.
- **Days** — The number of days applied to the given pay code for the given labor account.
- **Wages** — The total wages applied to the given pay code for the given labor account.
- **Employee Totals** — Individual totals for money, hours, days, and wages for the pay codes associated with the given labor account.
- **Grand Totals** — The total money, hours, and wages for labor accounts and pay codes included in the report.
- **Pay Code Summary** — The money, hours, days, and wages reported for each pay code.
- **Grand Totals** — The totals for money, hours, days, and wages for all pay codes.
- **Total Number of Employees** — The total number of employees who are included in the report.

Employee Hours by Labor Account (Excel)

This report produces raw, unformatted data about hours for each labor account in which the employees accrued hours. The data is intended for use with Microsoft

Excel. Similar information is formatted for display and printing in the Employee Hours by Labor Account report.

Employee Sign-off

Employee Sign-off shows information about the most recent signoff recorded for each of the employees who is included in the report.

A section at the end of the report includes the names of any employees whose data is out of date and the total number of employees whose data is out of date.

Note: The time period that you choose for this report applies to the HyperFind query and adjusts the employees included in the report rather than the dates on which the report is based.

Located in:

All

Detail Genie

Roll-Up Genie

Options

None

Report content

- **Name** — The name of the employee.
- **ID** — The ID number of the employee.
- **Manager** — The name of the employee's assigned manager.
- **Status** — Active, Inactive, or Terminated. Indicates the current status for the employee.
- **Status Date** — The date on which the employee's current status became effective.
- **Signed Off By** — The manager who last signed off the employee's timecard. This is blank if the employee has never been signed off.

- **Signed Off Performed On** — The date and time that the employee's timecard was last signed off. If the signoff is pending, this shows the date and time that the signoff became pending. This is blank if the employee has never been signed off.

- **Pending** — A "P" appears here if the signoff is pending.

- **Signed Off Through** — The last date for which the employee is signed-off. This is usually the last day of the signed off pay period.

- **Previous Pay Period Signed Off?** — Either yes or no. Indicates whether the employee's timecard from the previous pay period is signed-off.

- **Start Date, End Date, and Account** — The primary jobs and/or primary labor accounts that the employee has been assigned to since the last sign-off, including the start and end date of the assignments.

- **Total Number of Employees** — The number of employees who are included in the report.

Employee Time Detail (Spreadsheet Export)

Employee Time Detail shows employee time detail for options such as Employees, Timecard, Worked Shifts, and Pay Code Edits.

Locations

All

Options

None

Report content

Report content includes information on the following tabs:

- **Employee** — Including Name, ID, Employee Status, Primary Job, Primary Labor Account, Manager, and Pay Rule

- **Selected Timecard Dates**

- **Worked Shifts**

- **Spans** — Time span data

- **Pay Code Edits** — Including Name, Pay Code Edit type and start date, Symbolic Amount Type, Amount in seconds, days, and money, and Org Job

Employee Transactions & Totals

Employee Transactions & Totals displays pay code transaction data and totals by employee for a selected time period. Pay codes, their respective time or money amount totals, and wages are included in the display. Combined pay codes display separately with their respective time or money amount totals.

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 has been applied.

Employee Transactions and Totals and Employee Transactions and Totals (Date) are in PDF format. Use the Employee Transactions & Totals (Excel) report if you plan to export results to Excel.

Note: The Excel version of this report is not identical to the original version of this report. It contains a subset of the data that is available in the original report.

Located in:

All

Detail Genie

Timecard

Options

Actual/Adjusted — Specify the hours to be reported on, including:

- Hours credited to the selected time period only.

- Hours credited to the selected time period, plus historical edits and corrections made to the period.

Pay Codes — Select the pay codes whose hours appear in the report.

Report content

- **Employee** — The name of the employee and the employee's ID.

- **Transactions** — The pay code transactions for selected employees during the selected time period. Includes the following information:

  – **Day and Date** — The day of the week and date of the employee pay code edit.

  – **Pay Code** — The name of the pay code used in the transaction.

  – **Hours** — The number of hours that are associated with the edit.

  – **Money** — The money associated with the edit.

  – **Days** — The number of days that are associated with the edit.

  – **Entered By** — The name of the person who entered the pay code edit.

  – **Datasource** — The component from which the edit was made, such as Schedule Editor, DB Manager, and so on, if available.

- **Totals —** The pay code totals for each employee during the selected time period. Includes the following information:

  – **Pay Code** — The name of the pay code whose totals appear to the right or the name of the holiday credit rule when a holiday is paid as if worked.

  – **Hours —** The number of hours attributed to the pay code.

  – **Day** — The day totals attributed to the pay code.

  – **Money** — The amount of money attributed to the pay code.

  – **Wages** — The amount of wages attributed to the pay code.

Note: Wages are excluded from reports run by users without the appropriate data access profile.

- **Summary Totals** — The combined hours, money, and wage totals for all pay codes in the report.

- **Grand Totals —** The combined hours, days, money and wage totals for all employees, by pay code, in the report.

- **Total Number of Employees** — The number of employees who are included in the report.

Employees Currently Earning Time (On Premise)

Employees Currently Earning Time lists the employees who are punched in or who are currently earning time. The employees returned by the report are grouped according to the application used to determine their status, such as the Timecard Editor, the Scheduler, and so on. This is referred to as the application source.

Note: The time period that you choose for this report applies to the HyperFind query and adjusts the employees included in the report rather than the dates on which the report is based.

Use Employees Currently Earning Time (Data) to produce this information in raw, unformatted data for use with Microsoft Excel.

Located in:

All

Detail Genie

Options

None

Report content

- **Application Source** — The application where the edit was made, such as Scheduler, Timecard Editor, and so on, if available.
- **Name —** The name of the employee currently earning time.
- **ID** — The ID number for the employee currently earning time.
- **In Punch** — The time of the employee's in punch or the shift start time for non-punch employees.
- **User Account Name** — The account name of the person who entered the in punch or the shift start time.

- **Client IP Address** — The Internet Protocol (IP) address of the client PC on which the punch or start time was entered, if available.

- **Server URL** — The server on which the punch or start time was retrieved, if available.

- **Timeclock** — The hardware device on which the in-punch was entered.

- **Total Number of Employees** — The number of employees who are included in the report.

Employment Terms

Employment Terms lists the employment terms configured in Setup for a specified time period.

Located in:

All

Configuration

Options

None

Report content

Each set of employment terms is listed with details about its configuration for the specified time period:

- **Effective Dates** — The date range of a version of the employment terms.
- **Contract Group Only** — Indicates whether this set of employment terms is creating a contract group schedule.
- **Allow schedule inheritance** — Indicates whether all members of the schedule group acquire any schedule group-level edits.
- **Process Type**:
  - **Enforce end date** — When the employment terms assignment ends, the processing reverts to the direct assignment for the employee that starts on the day after the end date.
  - **Allow to process beyond end date** — When the employment terms assignment ends, the end date of the employment terms is ignored and the processing continues to use the employment terms until a new set is assigned to the employee.
- **Pay Rule** — The pay rule for the employment terms.

- **Accrual Profile** — The accrual profile for the employment terms.

- **Cascading Accrual Profile** — The cascading accrual profile for the employment terms.

- **Holiday Profile** — The holiday profile for the employment terms.

- **Duration Pay Code(s) —** The duration pay code that is configured for the employment terms.

- **Work Rule —** The work rule that is associated with the duration pay code for the employment terms. This work rule overrides the work rule that is configured within the pay code definition for the employment terms.

- **Work Hours Definition:**

  - **Date Pattern** — The name of the date pattern.

  - **Reference Date** — The reference date of the date pattern.

  - **Frequency** — The frequency of the date pattern.

  - **Amount: from Contract Group** — The amount of hours is taken directly from the employee's schedule for the time period for the active version.

  - **Amount: Specify** — The duration in hours of the date pattern.

  - **Include in Averaging Genie** — Indicates whether to include the working hours definition in the Averaging Genie.

  - **Track Totals in Pay Code** — The hours-based pay code in which the daily totals of time count toward the daily average limit.

Exception Rules

Exception Rules shows the configuration of all the exception rules that are configured in Setup.

Exception rules identify shifts that deviate from expected patterns and are part of an employee's work rule. An exception rule can include definitions for up to nine exception types.

Located in:

All

Configuration

Options

None

Report content

- **Exception Rule Name —** The name of the exception rule.
- **Unscheduled** — Either yes or blank (for no). Indicates whether hours entered during an unscheduled time period generate an exception.
- **Long Interval —** The length of time between an in-punch and an out-punch that generates a Long Interval exception. All shifts equal to or longer than the long interval will generate this exception.
- **Short Shift** — The duration of a short shift. Exceptions appear when rounded shift lengths are less than or equal to the short shift setting.
- **In Very Early** — Define the amount for very early in-punches. The exception occurs when employees punch in before their scheduled start times and at or before the very early-in amount.

- **In Early** — The length of time before an employee's shift at which an in-punch generates an In Early exception. Any in punch at or before this amount of time before the scheduled shift will generate this exception (unless the amount of time before the scheduled shift qualifies the "In Very Early" exception).

- **In Late** — The length of time after an employee's scheduled start time at which an in punch generates an "In Late" exception. Any in punch at or after this amount of time after the scheduled start time will generate this exception.

- **Out Early** — The length of time before an employee's scheduled end time at which an out punch generates an "Out Early" exception. Any out punch at or before this amount of time before the scheduled end time will generate this exception.

- **Out Late** — The length of time after an employee's scheduled end time at which an out punch generates an "Out Late" exception. Any out punch at or after this amount of time after the scheduled end time will generate this exception (unless the amount of time after the scheduled end time qualifies the "Out Very Late" exception).

- **Out Very Late** — The length of time after an employee's scheduled end time at which an out punch generates an "Out Very Late" exception. Any out punch at or after this amount of time after the scheduled end time will generate this exception.

- **Associated with Work Rule(s**) — The work rules that contain this exception rule.

- **Total Number of Exception Rules** — The total number of exception rules that are configured in Setup.

Exceptions

Exceptions shows exceptions and comments attached to the start or end of a shift, break, or meal, as well as absences for each employee within the specified time period.

A summary of exceptions for each employee is also included.

Use Exceptions (Data) to produce the raw, unformatted data intended for use with Microsoft Excel.

Located in:

All

Detail Genie

Timecard

Options

Absences — Specify Unexcused Only, Excused Only, Both, or None.

Exceptions — Choose the exceptions that appear in the report.

Report content

- **Exception Day/Date** — The day of the week and date on which the exception occurred.
- **Exception** — The type of exception (In Late, Out Early, and so on) or absence (Excused or Unexcused) that occurred.
- **Scheduled** — The time that the employee was scheduled to start or end the shift (for exceptions associated with a punch).
- **Actual or Pay Code** — The actual time that the employee started or ended the shift (for exceptions associated with a punch) or the pay code edit that resulted in the exception.

- **Amount —** The amount associated with the pay code edit that resulted in the exception, if applicable.

- **Amount Over Exception** — The amount of time between when the exception was generated and when the employee actually punched in or out.

  For example, if a late exception is generated 15 minutes after the expected start time, and the employee punches in 20 minutes late, the Amount Over Exception is 5 minutes.

- **Comment** — The comment attached to the pay code edit or punch that resulted in the exception.

- **Total Number of Exceptions** — The total number of exceptions during the selected time period for the group of employees included in the report.

Exception Summary

Exception Summary shows a graphical summary of the exceptions and related wage liability for a given time period and a given set of employees. A summary of exceptions for individual employees is also included.

Click the plus symbol (+) at the top of the employee list to show detailed exception information in the report.

Located in:

All

Detail Genie

Timecard

Options

Absences — You can choose the type of absences to include in the report: unexcused only, excused only, both unexcused and excused, or none.

Exceptions — You can set the types of exceptions to include in the report.

Report content

- **Exception Summary (Graph)** — A bar graph showing the number of exceptions by type.
- **Wage Liability Summary (Graph)** — A pie chart showing wage liability as a result of the selected exceptions, by type.
- **Exceptions —** The type of exception.
- **Total** — The number of exceptions of the given type.
- **Amount Over Exception —** The number of hours in exceptions for the given exception type.
- **Wage Liability** — The wage liability as a result of the given exception type.

- **Totals** — The total number of exceptions, hours, and wage lability for the selected exception types.
- **Name —** The employee name.
- **ID** — The employee ID.
- **Total** — The total number of exceptions for the employee.
- **Exceptions** — (optional)
- **Amount Over Exception** — The number of hours in exceptions for the employee.
- **Wage Liability —** The employee's wage liability for the exceptions.

Fixed Rules

Fixed Rules lists and defines all the fixed rules that are configured in Setup.

A fixed rule is a set of pay period parameters, included in a pay rule, that do not change based on when a person works. A fixed rule allows you to configure the pay period length, reference day or date, and the day divide.

Located in:

All

Configuration

Options

None

Report content

- **Period Type** — Days, semi-monthly, or monthly. Indicates the interval of time used to define the fixed rule. The rules in the report are grouped according to their period type.

- **Fixed Rule Name** — The name of the fixed rule.

- **Pay Period Length for Days** — The number of days in a pay period (for fixed rules that use the "days" period type only).

- **Reference Date** — The date upon which the fixed rule is based (for fixed rules that use the "days" period type only).

- **Reference Day** — The day of the month on which a monthly or semi-monthly fixed rule begins.

- **Day Divide** — The time of day that denotes a change from one day's worth of labor to the next. Typically, a day divide is midnight.

- **Hours Belong to** — Either Scheduled in-day, Scheduled out-day, Day with Majority Hours, or Day Actually Worked. This indicates the day to which hours worked across a day divide are applied.

- **Associated with Pay Rule(s)** — The pay rules that contain this fixed rule.

- **Total Number of Fixed Rules** — The total number of fixed rules that are configured in Setup.

Function Access Profiles

Function Access Profiles shows the complete access control point settings for the function access profiles that are configured in Setup.

Function access profiles are assigned to individual users, and they determine the functionality available to those users.

Located in:

All

Configuration

Options

Function Access Profiles — You can choose which function access profiles to include in the report.

Tip: Identifying only those profiles that are of interest to you allows you to greatly reduce the length of the report.

- One function access profile typically takes up 20 pages.
- The default for this option is to include all function access profiles.

Report content

Each of the access control points that make up a function access profile are listed in the report underneath the heading for the name of the profile being defined. The access control points are indicated as being either allowed or disallowed.

The names of the function access profiles included in the report appear at the top of each page in the report. The number in parentheses before the list of function access profile names is the total number of function access profiles included in the report.

Generic Data Access Profiles

Generic Data Access Profiles (GDAPs) shows the items selected from the accruals, data integration, employment terms, and pay policy categories contained in all of the Generic Data Access profiles configured in the system.

Located in:

All

Configuration

Options

None.

Report content

The report includes the name and description of each GDAP, followed by the categories. Each category is broken into the selected setup items, such as accrual codes and date patterns in the Accruals setup Category. If applicable, it also lists other GDAPs that use the items selected for the listed GDAP.

Holiday Credit Rules

Holiday Credit Rules shows the configuration of all the holiday credit rules that are configured in Setup.

Located in:

All

Configuration

Options

None

Report content

- The holiday credit rule name is the first line in each of the sections dealing with a different holiday credit rule.

- **Eligibility**
  - **Must work scheduled shift** — Indicates whether the employee must work on the holiday, before the holiday, after the holiday, or either before or after the holiday.
  - **Scheduled shift means** — Either Actual scheduled shift or Any shift on day of scheduled shift.
  - **Minimum time employed/active** — The minimum amount of time that the employee must be employed and active in order to receive this holiday credit.
  - **Worked History Qualifiers** — A list of the Worked History Qualifiers that must be satisfied in order for an employee to receive this credit.
  - **Alternate Holiday Credit Rule —** The alternate holiday credit rule to use if the employee does not satisfy the eligibility conditions for this holiday credit rule.

- **Credits**
    - **Credit type** — The type of amount credited by this holiday credit rule.
    - **Credits go into pay code** — The name of the pay code to which credited hours/wages are assigned.
    - **Associated with Pay Rule(s) —** The pay rules that contain this holiday credit rule.

Note: The remaining content in the Credits section of this report varies greatly and is based on the Credit Type. For a description of a particular value that you may see in this section of the report, refer to the online Help for Setup and look up holiday credit rules.

    - **Total Number of Holiday Credit Rules —** The total number of holiday credit rules that are configured in Setup.

Holiday Credits

Holiday Credits shows the credited and denied holiday credits for individual employees during the selected time period. If an employee did not qualify for a particular holiday credit, the reason is displayed.

Located in:

All

Configuration

Detail Genie

Scheduler

Timecard

Options

Holiday Credit Type — You can choose to include credits only, exceptions only, or both credits and exceptions.

Report content

- **Pay Rule Name** — The employee's pay rule assignment on the day of the holiday.
- **Holiday Date** — The date of the holiday.
- **Holiday Name** — The name of the holiday.
- **Holiday Status** — The amount of hours or money that is credited to the employee, if the holiday was credited.

Note: If the employee was granted holiday credits, the word **"Granted"** appears next to the number of hours or money amount. If the employee was denied holiday credits, the word "Denied" appears next to the blank space where the number of hours would normally appear.

- **Details** — An explanation of why the credit was denied, such as **"**Did not work scheduled day."

- **Primary Account** — The employee's primary account assignment on the day of the holiday.

- **Pay Code Name** — The pay code that is associated with the holiday.

Holiday Profiles

Holiday Profiles lists the Holiday profiles defined in Setup.

Located in:

All

Configuration

Options

None

Report content

- **Profile Name** — The name of the Holiday profile.
- **Description** — The Holiday profile description
- **Active/Inactive** — Indicates whether the Holiday profile is active or inactive on the date of the report.
- **Start Date - End Date** — The range of time that the Holiday profile is in effect.
- **Default Holiday Credit Rule** — The default Holiday Credit rule.
- **Default Zone Rule** — The default Zone rule.
- **Holiday Name** — The name or names of the holidays in the profile.
- **Holiday Credit Rule Override** — The Holiday Credit rule that overrides the default.
- **Default Zone Rule Override** — The Zone rule that overrides the default.

Holidays

Holidays shows all the holidays defined in Setup.

Located in:

All

Configuration

Options

None

Report content

- **Holiday Name** — The name of the holiday.
- **Starts**
    - **Day —** The day of the week that the holiday hours begin.
    - **Date** — The date that the holiday hours begin.
    - **Time** — The time that the holiday hours begin.
- **Ends**
    - **Day** — The day of the week that the holiday hours end.
    - **Date** — The date that the holiday hours end.
    - **Time** — The time that the holiday hours end.
- **Total Number of Holidays —** The total number of holidays that are configured in Setup.

Hours by Job

The Hours by Job report sorts all the hours, money, and wages earned by a set of employees first by the location in which the work was performed and second by the job that was worked.

Note: Select the Hours by Job (Excel) report if you plan on exporting to Excel.

Located in:

All

Detail Genie

Roll-Up Genie

Options

Actual/Adjusted — You can choose to include Actual hours worked or Adjusted/ Historical amounts. The default is Actual only.

Pay Code — You can choose the pay codes whose hours or days appear in the report.

Note: If you choose Actual, an historical edit is displayed on its effective date, but only if the *Include in totals for effective date* check box was selected when the edit was entered.

If you choose Adjusted/Historical, the report shows both actual and adjusted hour amounts. Any historical edit is displayed on its historical date (the date further in the past).

Report content

- **Job** — The job to which hours or money accrued.
- **Location** — The location name is the bold, centered text in the same row as the job name. It includes the full path to the location.
- **Pay Code** — The pay code to which days, hours, or money accrued.
- **Money —** The money attributed to the pay code.
- **Hours** — The hours attributed to the pay code.
- **Days —** The days attributed to the pay code.
- **Wages** — The wages attributed to the pay code.
- **Totals** — The totals for money, time, and wages for the given job.
- **Totals for [location]** — The totals for money, time, and wages in the given location.
- **Grand Totals —** The totals for money, time, and wages across all locations included in the report.
- **Summary Area**:
- **Grand Total by Pay Codes** — The pay code totals for money, days, hours, and wages across all locations included in the report.
- **Grand Totals** — The totals for money, days, hours, and wages across all locations and pay codes included in the report.

Hours by Labor Account

The Hours by Labor Account report sorts all the time, money, and wages earned by a set of employees by labor account. The report also totals time, money, and wages for labor accounts with a common first labor level.

Note: Select the Hours by Labor Account (Excel) report if you plan to export results to Excel.

The Excel version of this report is not identical to the original version of this report. It contains a subset of the data that is available in the original report.

Note: This report produces raw, unformatted data about the time, money, and wages earned by a set of employees by labor account. The data is intended for use with Microsoft Excel. Similar information is formatted for display and printing in the Hours by Labor Account report.

Located in:

All

Detail Genie

Roll-Up Genie

Timecard

Options

Actual/Adjusted — You can choose to include Actual hours worked or Adjusted/Historical amounts. The default is Actual only.

Pay Code — You can choose the pay codes whose days and hours appear in the report.

Note: If you choose Actual, an historical edit is displayed on its effective date, but only if the "Include in totals for effective date" check box was selected when the edit was entered.

If you choose Adjusted/Historical, the report shows both actual and adjusted hour amounts. Any historical edit is displayed on its historical date (the date further in the past).

Report content

- **Labor Account —** The labor account to which the pay code money, hours, and wages were charged.

- **Pay Code** — The pay code to which hours or money accrued.

- **Money** — The money attributed to the pay code.

- **Hours** — The hours attributed to the pay code.

- **Days** — The days attributed to the pay code.

- **Wages** — The wages attributed to the pay code.

- **Totals** — The totals for money, days, hours, and wages for the given labor account.

- **Totals for [labor accounts with a common first labor level]** — The totals for money, days, hours, and wages in labor accounts with the given first labor level.

- **Grand Totals** — The totals for money, days, hours, and wages across all labor accounts included in the report.

- **Pay Code Summary** — The pay code totals for money, days, hours, and wages across all labor accounts included in the report.

- **Grand Total —** The totals for money, days, hours, and wages across all labor accounts and pay codes included in the report.

Hours by Labor Account with Chart

The Hours by Labor Account with Chart report contains the same information as the "Hours by Labor Account" on page 108 with the addition of a pie chart showing the distribution of hours by pay code.

Note: If you would like a graph summary use the Hours by Labor Account with Graph Summary report.

Click the plus symbol (+) next to the labor account to show detailed totals by pay code, for those pay codes selected for the report.

The legend that appears beside the pie chart shows the color used to represent each pay code and the percentage of hours attributed to those pay codes.

Note: The legend is formatted to show up to 25 pay codes. In order to show more than 25, you can create a custom version of the report and reformat the legend to show the desired number of pay codes.

Only the legend is limited to the number of pay codes it can show. The pie chart itself is unlimited and will always include all of the pay code data included in the report.

Located in:

> All
>
> Detail Genie
>
> Roll-Up Genie
>
> Timecard

Options

Pay Code — You can choose the pay codes whose hours appear in the report.

Actual/Adjusted — You can choose to include Actual hours worked or Adjusted/ Historical amounts. The default is Actual only.

> **Note:** If you choose Actual, an historical edit is displayed on its effective date, but only if the "Include in totals for effective date" check box was selected when the edit was entered.
>
> If you choose Adjusted/Historical, the report shows both actual and adjusted hour amounts. Any historical edit is displayed on its historical date (the date further in the past).

Report contents

- **Time Period** — The period of time reported.
- **Query** — The HyperFind query used for the report.
- **Pay Codes** — Pay codes included in the report.
- **Actual/Adjusted** — Specifies what hours are credited in the report.
- **Labor Account** — The labor account of employees included in the report.
- **Pay codes itemized** — Money, hours, and wages for each pay code.
- **Totals** — Total money, hours, and wages for each pay code, along with the total number of employees, and the grand totals.

Hours by Labor Account with Graph Summary report

- **Graph Summary** — Percentages of time pay codes in a pie chart.

HyperFind Profiles

HyperFind profiles contains information about the HyperFind Profiles configured in Setup.

Located in:

All

Configuration

Options

None

Report content

- **Name** — The name of the HyperFind profile.
- **Description** — The description of the HyperFind profile.
- **Selected Queries** — Lists the HyperFind queries included in the HyperFind profile.
- **Total number of HyperFind queries selected** — The number of HyperFind queries selected for the profile.

Import Errors

Import Errors shows detailed information for any errors that occur during an XML or table import batch operation. Use the Import Batch option to specify the batch to include in the report.

Located in:

All

Configuration

Import

Options

- **Import Batch** — Choose the import batch to include in the report based on the name of the import and the date on which it was run.

  There are two ways of choosing the batch:

  – You can select from a list of Specific Batch names.

  – You can select from a shorter list of the Latest Completed Batches.

  The default selection for this option is the most recently completed batch.

- **Import Type** — Choose the type of imports to include in the report, such as Accruals imports or People imports. The default is to include all import types.

Report content

- **Import Type** — The type of import, such as a specific import table.

- **Batch Date/Time/Name** — The date and time that the batch was started and the name of the batch.

- **Batch Finished** — The date and time that the batch completed.

- **Record ID** — The ID of the record in which an error occurred during the import.

- **Error Date and Time** — The date and time of the error.
- **Error Message** — The error message associated with the error.
- **Number of Successes** — The number of records that were successfully imported.
- **Number of Failures** — The number of records that failed to be imported due to errors.
- **Number of Total Records** — The total number of records that were processed by the batch (this number includes both successful and failed records).

Import Statistics

Import Statistics shows summary information for XML or table import batch operations. Use the Import Batch option to specify the batch to include in the report.

The report allows system administrators to report on the progress of an import operation.

Located in:

All

Configuration

Import

Options

Import Batch — Choose the import batch to include in the report based on the name of the import and the date on which it was run.

There are two ways of choosing the batch:

- you can select from a list of Specific Batch names
- You can select from a shorter list of the Latest Completed Batches.

The default selection for this option is the most recently completed batch.

Report content

- **Import Batch Name** — The name of the import batch.
- **Start Date and Time** — The date and time that the batch was started.
- **Duration** — The length of time that the batch operation has been running or the total time if the batch operation is complete (see Status).
- **Import Type** — The type of import, such as a specific import table.

- **Number of Successes** — The number of records that were successfully imported.

- **Number of Failures —** The number of records that failed to be imported due to errors.

- **Number of Total Records** — The total number of records that were processed by the batch (this number includes both successful and failed records).

- **Status** — Either In Process, Completed, Aborted, or Interrupted. Indicates the current status of the import operation.

- **Status Date and Time** — The date and time associated with the reported status of the import operation. For example, the date and time that the operation was completed or aborted.

Job Configuration

Job Configuration shows the configuration of each job that is defined in the Jobs and Organizational Map component.

Located in:

All

Configuration

Options

None

Report content

- **Job Number** — The sort order number for the job. This number controls the placement of the job in a list of jobs.
- **Job Name** — The name of the job that appears in most displays.
- **Job Description** — The description of the job (this can also be the full name of the job).
- **Job Code** — The code number associated with the job.
- **Job Title** — The full name of the job.
- **Labor Level Entry Name** — The labor level entry name with which the job is associated (for jobs associated with labor levels only).
- **Labor Level Entry Description** — The description of the labor level entry name with which the job is associated.
- **Total Number of Jobs** — The total number of jobs that are defined in the application.

Labor Levels

Labor Levels shows the configuration of each labor level and lists the labor level entries for each labor level as defined in Setup.

Located in:

All

Configuration

Options

None

Report content

- **Labor Levels** — The labor level number. Indicates the placement of this labor level within the system. Up to seven labor levels can be configured for a site.

- **Abbreviation** — The abbreviation of the labor level name.

- **Labor Level Name** — The name assigned to the numbered labor level.

- **Minimum and Maximum Name Length** — The minimum and maximum allowable characters for labor level entry names for this labor level.

- **Validate All New Entries** — Either yes or no. Indicates whether ad hoc entries can be added to the employee timecard.

- **Can Override Min or Max** — Either yes or no. Indicates whether a manager can override the minimum and maximum allowable characters settings when entering a new labor level entry name for this labor level.

- **Entry Name** — The name of a labor level entry for this labor level.

- **Entry Description** — The description associated with the labor level entry name to the left.

- **Inactive Flag** — Indicates whether the labor level entry is inactivate.

- **Long List Warning Limit** — Indicates whether the list is too long.
- **Total Number of Labor Levels** — The total number of labor levels defined in Setup.

Majority Rules

Majority Rules shows the configuration of the majority rules that are configured in Setup.

Located in:

All

Configuration

Options

None

Report content

- **Majority Rule Name** — The name of the majority rule.
- **Equal Intervals Use Rule** — The name of the rule that is applied for equal intervals of worked time.
- I**nclude Regular —** Indicates whether regular shifts are included in the majority calculation. If people work most of the time during a regular (non-zero) shift, regular applies to the entire shift.
- **Include Punched breaks** — Either yes or no. Indicates whether punched breaks are included in the totalized results of this report.
- **Include Deducts** — Either yes or no. Indicates whether time for automatic deductions should be included in a zone length for the majority shift calculation.
- **Associated with Work Rule(s)** — The work rules that contain this majority rule.

- **Selected Zones** — The name of the zones that are considered when calculating the majority zone.
- **Total Number of Majority Rules —** The total number of majority rules that are configured in Setup.

Missing Employees

Missing Employees contains a summary of all employees whose totalization status for the BGP is not up-to-date.

Located in:

All

Working Time Directive

Options

None

Report content

- **Employee Name** — The name of the employee.
- **ID —** The ID number of the employee.
- **Home Account** — The primary labor account assigned to the employee during the selected time period.
- **Hire Date —** The date on which the employee was hired.

Night Worker

Night Worker shows the average number of worked hours per day for each selected night worker employee, and indicates whether the employee is in violation of the night worker limits for average hours per day and/or average total rest days per week for the given Average Period.

Located in:

All

Working Time Directive

Options

Each Working Time Directive rule includes default settings for the options that are used to generate Working Time Directive reports. You can override the default settings for the following options:

- **First Day of Week** — The start day of the work week. Each week included in the report begins on this day.

- **Max Night Hours** — The maximum number of hours night workers can average per day before they are in violation.

- **Number of Iterations** — The number of times to run the report. Each iteration begins and ends one week after the previous iteration. The results of each iteration are included in a single output of the report.

  For example, if a rule calls for a 17-week Average Period and the first Average Period starts on January 1st, the second iteration of the Average Period will begin on January 8th and end a week after the period that started on January 1st. Including multiple iterations in a report allows you to view average hours per week for more than one averaging window.

- **Report content** — Choose to include all employees or only those in violation of the Working Time Directive rules.

- **Work Week Length** — The number of days in a work week (between 1 and 7 is allowed). Days after this number but before the next First Day of Week are ignored.

Report content

- **Employee Name** — The name of the employee.
- **ID** — The ID number of the employee.
- **Home Account** — The primary labor account assigned to the employee during the selected time period.
- **Period Start** — The beginning of the Average Period. This date corresponds to the occurrence of the chosen First Day of Week.
- **Period End** — The end of the Average Period. This date reflects the length of the work week and the number of weeks included in the Average Period. The end date does not reflect the end date of the Time Period chosen for the report.
- **Total Normal Hours/Period** — The total number of hours worked in the Average Period.
- **Total Days in Period** — The number of days included in the Average Period.
- **Total Work Days in Period —** The number of days on which the employee worked.
- **Total Req. Rest Days** — The number of days the employee is required not to work during the Average Period.
- **Avg. Normal Hours** — The average number of hours worked per day during the Average Period.
- **Violation/Flag** — Indicates whether the employee is in violation of the assigned Working Time Directive rule for the given Average Period. This column may also include an NE (New Employee) or ID (Insufficient Data) flag.

The Insufficient Data flag indicates that the current worked time limit only applies to a part of the Average Period. This happens when an employee has chosen to opt out of the Working Time Directive rule, or when the properties of the worker change to an extent that a certain rule only applies to a part of the Average Period.

Organizational Job Configuration

Organizational Job Configuration shows the job and location combinations that make up each organizational job in the system. The format of the report lists each job along with all the locations to which that job has been attached.

Located in:

All

Configuration

Options

None

Report content

- **Job Number** — The sort order number that is assigned to the job. This number controls the placement of the job in a list of jobs.

- **Job Name** — The name of the job.

- **Location —** The locations within the organizational map to which the job is attached.

- **Start Date** — The effective start date of the job and location pairing.

- **End Date** — The end date of the job and location pairing.

- **Total Number of [a job name]** — The total number of organizational jobs created from the named job (that is, the number of locations to which the job has been attached).

- **Total Number of Jobs** — The number of jobs defined in the system.

- **Total Number of Organizational Jobs** — The total number of organizational jobs that are defined in the system (that is, the total number of job and location pairings).

Organizational Map Locations

Organizational Map Locations shows the configuration of locations within the organizational map. The format of the report groups locations by location type and includes the labor level mapping information for each location.

Note: This report also includes job configuration settings as part of the predefined "Job" location type. Each job is treated as a location within the "Job" location type.

Located in:

All

Configuration

Options

None

Report content

- **Location Type** — The location type to which the location belongs.
- **Parent Locations** — The larger location that contains the location named to the right.
- **Location Name** — The name of a location.
- **Location Description** — The description of the location.
- **Labor Level Entry** — The labor level entry associated with this location.
- **Labor Level Entry Description** — The description of the labor level entry associated with this location.
- **Start Date** — The effective start date for these location settings.

- **End Date** — The end date for these location settings.
- **Total Number of Locations for [a location type]** — The total number of locations that are defined for the named location type.

Organizational Map Location Types

Organizational Map Location Types shows the configuration of each location type defined in Setup.

Located in:

All

Configuration

Options

None

Report content

- **Location Type** — The name of the location type.
- **Maps to Labor Level** — The name of the labor level to which the location type corresponds.
- **Allow New LL Entries** — Either yes or no. Indicates whether you can create new labor level entries as part of creating new locations for this location type.
- **Segment Number —** The part of a labor level entry to which the location type maps. For use when two location types map to the same labor level.
- **Segment Length** — The number of characters in the labor level segment to which the location type maps. For use when two location types map to the same labor level.
- **Fill Character —** The character used to complete a labor level entry when an organizational job does not contain all the location types that are associated with a segmented labor level.
- **Fill Position** — The position to insert a fill character when a segment of the labor level entry does not meet the segment length criteria.

- **End Separator Character** — The character used to separate segments of a labor level entry.

- **Total Number of Location Types** — The number of location types that are defined in the system.

Organizational Sets

Organizational Sets lists all the organizational sets defined in Setup. An organizational set is some collection of locations and jobs that are available within a job transfer set or an organizational group.

Located in:

All

Configuration

Options

None

Report content

- The organizational sets included in the report are grouped by usage. Organizational sets are set for use in either Job Transfer Sets, Organizational Groups, or both (designated by the grouping "All Organizational Sets").

- **Name** — The name of the organizational set.

- **Description** — A description of the organizational set.

- **Set Content** — The locations that are contained in the organizational set.

- **Start Date** — The effective start date for these organizational set settings.

- **End Dat**e — The end date for these organizational set settings.

- **Total Number of Sets** — The total number of organizational sets that are defined for the given use.

Overtime Equalization Detail

Overtime Equalization Detail shows the history of overtime offered and subsequently refused or accepted by employees. This report is helpful for addressing employee grievances.

Note: The Overtime Equalization feature must be implemented for this report to run.

Note: Use **Overtime Equalization Detail (data)** to produce the raw, unformatted data that is intended for use with Microsoft Excel.

Located in:

All

Detail Genie

Timecard

Options

None

Report content

- **Effective Date** — The date that overtime hours were offered, accepted, refused, or reset, depending on the Action.
- **Action** — Overtime hours that were Offered, Accepted, or Refused (other possibilities are Reset or Balance Forward).
- **Offered** — The number of overtime hours that were offered.
- **Accepted** — The number of overtime hours that were accepted.
- **Refused** — The number of overtime hours that were refused.
- **Comments** — The comments that are associated with the action.

- **Total Hours** — The total number of hours that were offered, accepted, and refused for each employee.

- **Total Number of Employees** — The number of employees who are included in the report.

Overtime Rules

Overtime Rules lists and describes the overtime rules that are configured in Setup. The rules in the report are grouped by their reset type.

Located in:

All

Configuration

Options

None

Report content

- **Reset Type** — The interval that resets the number of hours for overtime consideration. For example, overtime based on the number of hours worked in one day is reset with every new day.

  Note: The additional information that appears on the report depends on the reset type.

  For example, a reset type of New day includes Use Pay Code Definition for Counting toward overtime?, Override pay codes, and Associated with Work Rules, whereas a reset type of Specified amount of time includes Associated with Work Rule(s).

- **Overtime Rule** — The name of the overtime rule.
- **Requires Approval** — Either yes or no. Indicates if this type of overtime requires manager approval.

- **Overtime Starts After** — The number of hours worked after which overtime is in effect. An asterisk (*) in the column indicates that the system is applying the Use Employee Work Hours Definition for the Overtime Starts After entry (see note at bottom of page).

- **Min Hours Over Limit** — The smallest amount of overtime to be worked before people begin to earn the overtime hour type.

- **Reset** — The point in time when the overtime accumulator resets to zero.

- **Limit Resets On** — A day or date that starts a period setting. Additional settings may include time or number of days.

- **Date Pattern** — The name of the date pattern for the overtime rule.

- **Use Pay Code Definition for Counting Toward Overtime?** — Either yes or no. If yes, then the default pay code definition is used. If no, then the default definition is overridden.

- **Overriding Pay Codes that Count toward Overtime —** The pay code rules with counts toward overtime settings that are being overridden by the setting in this rule.

- **Charge Order** — Indicates how overtime allocations are computed: Chronological, Reverse Chronological, or Prorated.

- **Determine overtime before applying processing order** — If the check box is selected, then the sequence in which worked time is allocated to be paid is altered.

- **Overtime Allocation** — Lists the Process Order (1, 2, 3) and Reasons for Overtime (Float, Overtime Shift, Call-In)

- **Warning Alert** — The alert that is sent to the employee if the hours before time threshold is reached for this overtime rule.

- **Hours Before —** The amount of time before the Warning Alert threshold is reached that an alert is sent.

- **Overtime Reached Alert** — The alert that is sent to the employee if the overtime limit is reached for this overtime rule.

- **Automatic Shortfall Adjustment** — Indicates whether the system will make up any hours that the employee is short when there is a shortfall situation.

- **Shortfall Pay Code** — The pay code to which the shortfall total of time is applied. This field only prints if Automatic Shortfall Adjustment is Yes.

- **Associated with Work Rule(s)** — The work rules that contain this overtime rule.

- **Total Number of Overtime Rules** — The total number of overtime rules that are configured in Setup.

Pay Code Data Access Profiles

Pay Code Data Access Profiles shows the configuration of the pay code data access profiles that are defined in Setup.

Located in:

All

Configuration

Options

None

Report content

- **Name** — The name of the pay code data access profile.
- **Description** — The description of the pay code data access profile as defined in Setup.
- **Selected Pay Code(s) —** The list of pay codes that are available to the employees assigned to this pay code data access profile.
- **Total number of pay codes —** The number of pay codes that are selected for this pay code data access profile.

Pay Codes

Pay Codes lists and describes the pay codes that are configured in Setup.

A pay code is a category used to organize time (hours or days) or money. Time pay codes accrue hours or days; money pay codes accrue money.

Located in:

All

Configuration

Options

None

Report content

- **Name** — The name of the pay code.
- **Code Number** — The code number assigned to the pay code.
- **Short Name** — The abbreviated name of the pay code used for certain display purposes.
- **Visible on Totals tab in Timecards** — Either yes or no. Indicates whether totals for this pay code are shown in the totals area of the timecard.
- **Type** — Indicates the type of pay code amount: standard, duration, or cascading.
- **Visible in totals columns of Timecard's main area** — Indicates if a pay code edit using this pay code adds edited hours with worked hours.
- **Edit Excuses Absence** — Indicates whether a pay code edit using this pay code excuses an absence and removes a person from the absence. For example, a pay code edit of allowed sick time might excuse an absence that was previously unexcused.

- **Edits Count Toward Overtime Limits** — Indicates whether a pay code edit using this pay code is added to the appropriate overtime limits.

- **Edits Count Toward Consec. Day OT** — Indicates whether a pay code edit using this pay code is added to the count toward the minimum hours requirement for a day in order for that day to count toward consecutive days of overtime.

- **Edits Repeat on Sched. Days** — Indicates whether a pay code edit using this pay code is repeated for scheduled days until another edit is performed.

- **Add** — The amount of money that is added to a person's base wages each hour for this pay code. This option is only available for pay codes that hold time.

- **Multiplier** — The factor used to calculate a person's wages for this pay code. This factor determines whether an employee's time in this pay code is taken at the flat wage rate (multiplier of "1") or at a greater or lesser wage rate.

  This option is only available for pay codes that hold time.

- **Scheduled Hours Type** — Indicates how the hours from this pay code are classified in the scheduler. The scheduled hours type determines whether the hours are added to the number of total scheduled hours in the scheduler.

  For example, a scheduled vacation might not be included in the total scheduled hours.

- **Affects Availability** — Either yes or no. Indicates whether the pay code is set up to affect availability.

- **Visible in the main area of Timecard and Schedule, on Hours Summary tab in Schedule and in associated Reports** — Either yes or no. Indicates whether the pay code is visible in timecard, schedules, and reports.

- **Unit** — Indicates the type of pay code unit: hours, money, or day.

- **Associate with Duration Pay Code** — The duration pay code associated with a day-based pay code.

- **Duration Work Rule** — The work rule that overrides the regularly-configured work rule when the duration pay code is used.

- **Visible in Report Options and Report Totals** — Either yes or no. Indicates whether the pay code shows in Report options and in report totals.

- **Total Number of Pay Codes —** The total number of pay codes that are configured in Setup.

Pay Rule Audit Trail

Pay Rule Audit Trail provides information about changes that were made to pay rules during the selected time period.

Located in:

All

Configuration

Options

Audit Action — Select the check box of one or more types of audits that you want to include in the report (Add, Edit, or Delete).

Building Block Type — Select the type of building block that you want to include in the audit trail.

Report content

- **Building Block Type** — The building block type that was audited.

- **Action** — The type of audit performed on the building block.

- **Building Block Name** — The name of the building block that was audited. There may also be a list of the elements of the building block, such as Overtime Allocation, that have been modified.

- **Date/Time** — The date and time that the audit was made.

- **Server/Client** — The name and IP address of the Server or Client machine where the change was made.

- **Changes by** — The name of the user who made the following audits.

- **New Value (only when the Action is Edit)** — The new value of the edited setting.

- **[Previous Value] (only when the Action is Edit)** — The previous value of the edited setting.

- **Total Number of Building Block Entry Changes** — The total number of audits made to the selected building block type.

Pay Rules

Pay Rules lists and describes all the pay rules that are configured in Setup.

Located in:

All

Configuration

Options

None

Report content

- **Pay Rule Name** — The name of the pay rule.
- **Effective Dates** — The beginning and end date for this configuration of the rule.
- **Default Work Rule** — The name of the work rule associated with this pay rule.
- **TK Timeclock Rule** — The name of the timekeeping rule associated with this pay rule.
- **Fixed Rule** — The name of the fixed rule associated with this pay rule.
- **Sequencer** — The name of the sequencer that is associated with this pay rule.
- **Store Projected Totals** — Either yes or no. Indicates whether projected hours for employees assigned to this pay rule are stored in the database.
- **Default Holiday Credit Rule —** The name of the holiday credit rule associated with this pay rule.
- **Selected Holidays** — The holidays that are associated with this pay rule.
- **Associated Holiday Credit Rules —** The holiday credit rules assigned to each holiday associated with this pay rule.

- **Pay From Schedule** — This section indicates the pay from schedule settings for the pay rule.

- **Total Number of Pay Rules** — The number of pay rules that are configured in Setup.

Payroll Preparation Totals

Payroll Preparation Totals is an audit of the activity that takes place when you run the Payroll Preparation function to take a snapshot and/or calculate corrections to employee's pay roll. Changes are logged for hours or money for all employees who fall into the current pay period.

Located in:

All

Timecard

Options

None

Report content

- The report contains the following information for each Payroll Prep Run:
    - **Payroll Prep Run Date** — Date and time on which the Payroll Preparation function was run.
    - **Apply Date** — All corrections are applied to the first day of the current pay period. The date on which the correction occurs is the *Adjusted Apply Date*, defined below.
    - **Adjusted Apply Date —** The date for the correction. For example, a correction to hours on June 10, which is in the prior pay period, has an *Apply Date* of the first day in the current pay period (say, June 17), and an *Adjusted Apply Date* of June 10.

      The Adjusted Apply Date for a snapshot is the same date as the Apply Date.
    - **Transaction Type** — Snapshot or Correction run.
    - **Pay Code —** Paycode to which the hours or changes are charged.

- **Totals** — Total number of hours affected by the correction or contained in the snapshot.

- **Payroll Prep Lock Details:**

  Lock Date — Date on which the lock was applied.

  Time — Time at which the lock was applied.

  Type — Indicates whether the lock was applied to Corrections or Corrections and Snapshot.

  Unlocked — Indicates whether the specific lock run has been unlocked.

  Date — Date on which the unlock was applied.

  Time — Time at which the unlock was applied.

Person Attributes

Person Attributes shows a summary of personal information for each employee who is included in the report. The information in the report comes from the Person tab of the People Editor.

Note: The content that appears depends on the software installed at your site and the licenses assigned to each employee.

Located in:

All

Configuration

Detail Genie

Scheduler

Timecard

Options

None

Report content

- The top-level heading for each employee included in the report contains the employee's name, the shortened name for the employee, and the employee's ID number.
- **Licenses** — The licenses that are assigned to the employee.
- **General Information** — General information about the employee, such as Birth Date, Hire Date, and Employment Status.
- **Skills** — The skills attributed to the employee.
- **Certifications** — The certifications earned by the employee.

- **Approvals** — The list of approvers for overtime requests, including the level of each approval and the time period within which approval must occur.

- **Leave Management** — The Accrual Profile and Accrual Profile transition information, if any, Full Time Equivalency settings, and Cascade Profile assigned to the employee.

- **User Information** — The User Name, Logon Profile, Last Password Change date, Require Password Change at Next Logon. and User Account Status values for the employee.

- **Contacts** — The contact information for the employee.

- **Person's Dates** — The dates that are associated with the employee, such as 401K Enrollment Date, Union Hire Date, and so on.

- **Process Profiles** — The Process profiles assigned to the employee, including Employee Profile, Manager Profile, or both.

- **Working Time Directive** — The Working Time Directive rule assigned to the employee, if any, and Hazardous Duty, if any.

- **Statutory Reports Profiles —** The Statutory Report profile or profiles assigned to the employee, including effective and expiration dates.

Person Details (Spreadsheet Export)

Person Details shows the information in each selected employee's People record.

Located in:

All

Detailed Genies

Scheduler

Timecard

Options

None

Person Job Assignment

Person Job Assignment lists the information that is detailed in the Job Assignment tab of the People Editor for each employee who is included in the report.

Note: Use **Person Job Assignment (data)** to produce the raw, unformatted data that is intended for use with Microsoft Excel.

Located in:

All

Configuration

Detail Genie

Scheduler

Timecard

Options

None

Report content

• The top-level heading for each employee included in the report contains the employee's name, the shortened name for the employee, and the employee's ID number.

• **Primary Account —** The primary account history for the employee including the current account (the effective date for each account is included) along with the employee's Timezone and Seniority Date.

• **Timekeeper** — The employee's Worker Type, Standard Hours, Base Wage, Pay Rule, Wage Profile, Device Group, and Badge Number. Also includes the name of the person the employee reports to.

- **Employment Terms** — The employment terms assigned. Employment terms might contain pay rules, accrual policies, cascading profiles, holiday profiles, duration profiles, and working hours definitions

- **Personal Overtime** — The Personal Overtime settings for the employee.

- **Scheduler** — The Schedule Group and Schedule Rule Set assigned to the employee and the effective dates for these settings.

- **Access Profiles —** The Function Access profile, Display profile, and Delegate profile assigned to the employee.

- **Employee Role** — The Labor Level Transfer Set, Time Entry Method, Pay Code Profile, Work Rule Profile, and Job Transfer Set for the employee.

- **Manager Role - General (if applicable)** — The Employee Group, Labor Level Transfer Set, Pay Code Profile, Work Rule Profile, Reports Profile, Organizational Group, and Job Transfer Set for the manager. Also includes the setting for whether the manager can see transferred employees.

- **Manager Role - Scheduler (if applicable)** — The Schedule Group Profile, Shift Template Profile, Patter Template Profile, and Availability Template Profile for the manager.

- **Tips and Tokes** — The Tip Compliance rules, which enable you to track tip amounts based on predefined tip rates and qualifying criteria, such as a labor account, job, or pay code.

  The Toke Pool Rules, which enable you to distribute toke awards based on toke pool qualifying criteria, such as a pay code for adjustment, labor account, or job.

Primary Account Detail

Primary Account Detail shows the history of primary job and/or primary labor account assignments for each employee included in the report and for the specified time period.

The report is divided by those people who are employees and those who are not.

Located in:

All

Detail Genie

Scheduler

Timecard

Options

None

Report content

- The top-level heading for each employee included in the report contains the employee's name and the employee's ID number.

  The list of primary jobs and/or primary labor accounts below the employee name contains the primary jobs/and or primary labor accounts to which the employee has been assigned during the selected time period.

  The dates for each account are included to the left of the account.

- **Audit Trail** — The audit trail contains detailed information about each time the primary job or primary labor account assignment was changed including the dates of the assignment, the user who made the change, and the date and time the change was made.

- **Total Number of Employees** — The number of employees who are included in the report.

- **Total Number of Non Employees** — The number of non employees who are included in the report.

- **Total Number of Persons —** The total number of people who are included in the report (both employees and non employees).

Punch Interpretation Rules

Punch Interpretation Rules lists all the Punch Interpretation rules that are configured in Setup.

Punch Interpretation rules specify when punches link to schedules and when data collection devices accept and reject punches.

Located in:

All

Configuration

Options

None

Report content

- **Punch Interpretation Rule Name** — The name of the rule.
- **Schedule Margin (Early and Late)** — The length of time before and after a shift that an employee can punch in using a device and still have their punch link to the scheduled shift.
- **Unscheduled Shift Length** — The value used to calculate the expected end to an unscheduled shift.
- **End Margin** — The length of time before and after the scheduled end of a shift that a punch is considered to be an out-punch even if the punch is the first punch recorded for the shift (in which case the in-punch is determined to be missing and an exception is generated).
- **Restrict Unscheduled In Punches —** Either yes or no. Indicates whether employees without a scheduled shift are allowed to punch in.
- **Restriction (Start, Early End, and Late End)** — These values determine how early or late an employee is allowed to punch in or out using a device.

- **Missed Out Limit** — Indicates the length of time after an in-punch that the out-punch is determined to have been missed and an out-punch exception is generated.

- **Associated with Pay Rule(s)** — The pay rules that contain this timeclock rule.

- **Total Number of Timeclock Rules** — The number of timeclock rules that are configured in the suite Setup.

Punch Origin

Punch Origin shows all punches, both in and out, for selected employees. The report is organized by employee name.

Located in:

All

Detail Genie

Timecard

Options

None

Report content

- **Punch Date/time** — The data and time of the punch.
- **User** — The user name on the account to which the punch is attributed.
- **Client** — The client machine or device from which the user instantiated the punch. This field may contain:
    – The IP address of a PC
    – The name of a Device Manager device
    – A MobileTime device ID
    – Information about a TeleTime server for a punch initiated from a telephone
- **Server —** The full name of the application server to which the punch was entered.

- **Datasource** — The component of the application from which the punch was recorded.
- **Total Number of Employees** — The total number of employees who are included in the report.

Report Data Access Profiles

Report Data Access Profiles shows the configuration of the report data access profiles that are defined in Setup.

Located in:

All

Configuration

Options

None

Report content

- **Name —** The name of the report data access profile.
- **Description** — The description of the report data access profile as defined in Setup.
- **Selected Report(s)** — The list of reports available to the employees who are assigned to this report data access profile.
- **Total number of reports** — The number of reports selected for this report data access profile.

Rest Breaks

Rest Breaks shows whether the selected employees have taken the minimum required rest time within each of the shifts they worked in the selected time period.

Shifts that are greater than a minimum length usually require a minimum rest time.

Note: Employees cannot opt out of the requirement for minimum break time within a shift, as they can for some of the other Working Time Directive rules.

Only break time taken within a shift counts toward the minimum requirement. Break time taken at the beginning or end of a shift does not count.

Located in:

All

Working Time Directive

Options

Each Working Time Directive rule includes default settings for the options that are used to generate Working Time Directive reports. You can override the default settings for the following option:

- **Report content** — Choose to include all employees or only those in violation of the Working Time Directive rules.

Report content

- **Employee Name —** The name of the employee.
- **ID** — The ID number of the employee.
- **Home Account** — The primary labor account assigned to the employee during the selected time period.

- **Young/Adult** — Indicates whether the employee is classified as an adult or a young worker.

- **Daily Minimum Break** — The minimum break length required for shifts of a certain length. (The minimum shift length that requires a break is specified in the Working Time Directive rule).

- **Date/Time In** — The start of a shift worked by the employee.

- **Date/Time Out** — The end of a shift worked by the employee.

- **Shift Length** — The total length of the shift.

- **Total Work Hours** — The number of hours spent working during the shift.

- **Total Break Length** — The length of the break taken during the shift.

- **Violation** — Indicates whether the employee is in violation of the assigned Working Time Directive rule for the given shift.

Note: Hours added as a pay code edit are appended to the first shift of the day.

Reviewer Lists

Reviewer Lists shows the reviewer lists configured in Setup.

Located in:

All

Configuration

Options

None

Rounding Rules

Rounding Rules lists the rounding rules that are configured in Setup.

Located in:

All

Configuration

Options

None

Report content

- **Round Rule Name** — The name of the rounding rule.
- **Missed Punch Treat as an Exception** — Either yes or no. Indicates whether a missed punch is applied as an exception.
- **Use Scheduled Time** — Either yes or no. Indicates whether the scheduled time for a punch should be applied if the punch is missing.
- **Unscheduled Punch Rounding** — The transfer, in-punch, and out-punch round and grace values.
    - **Round** — The rounding interval for the given type of rounding.
    - **Grace** — The grace interval that determines whether rounding is performed up or down to the nearest round interval. Any value greater than the grace interval is rounded up.
- **Early Punch Rounding** — The early punch rounding settings for both in and out punches.
    - **Outside In Rd/Gr** — The outside rounding round and grace values for in punches.
    - **Outside Out Rd/Gr** — The outside rounding round and grace values for out punches.

- – **Chg. Pt. In** — The change point value for rounding in punches. This determines when to use inside rounding instead of outside rounding.

  – **Chg. Pt. Out** — The change point value for rounding out punches. This determines when to use inside rounding instead of outside rounding.

  – **Inside In Rd/Gr** — The inside rounding round and grace values for in punches.

  – **Inside Out Rd/Gr** — The inside rounding round and grace values for out punches.

- • **Late Punch Rounding** — The late punch rounding settings for both in and out punches.

  – **Inside In Rd/Gr** — The inside rounding round and grace values for in punches.

  – **Inside Out Rd/Gr** — The inside rounding round and grace values for out punches.

  – **Chg. Pt. In** — The change point value for rounding in punches. This determines when to use outside rounding instead of inside rounding.

  – **Chg. Pt. Out** — The change point value for rounding out punches. This determines when to use outside rounding instead of inside rounding.

  – **Outside In Rd/Gr —** The outside rounding round and grace values for in punches.

  – **Outside Out Rd/Gr** — The outside rounding round and grace values for out punches.

- • **Associated With Work Rules** — The work rules that contain this rounding rule.

- • **Total Number of Rounding Rules —** The total number of rounding rules that are configured in Setup.

Schedule Deviation Rules

Schedule Deviation Rules lists the schedule deviation rules that are configured in Setup.

Schedule deviation rules allow you to set up special differentials for employees who work before or after scheduled shifts or when they were not originally scheduled to work.

Located in:

All

Configuration

Options

None

Report content

- **Schedule Before or After Shift** — Indicates that if an in-punch does not link to a schedule, the time worked accumulates as schedule deviation time. Selections include before shift and after shift.

- **Not scheduled** — Indicates that if an in-punch does not link to a schedule, the time worked accumulates as schedule deviation time.

- **Associated with Work Rule(s)** — The work rules that contain this schedule deviation rule.

- **Total Number of Schedule Deviation Rules** — The number of schedule deviation rules that are configured in Setup.

- **Requires Overtime** — Yes or No.

System Settings Audit

Displays audit information for modify action performed for System Settings, including date and time of the action, who performed the action, and what information has changed.

Located in:

All

Configuration

Options:

None

Report content

Date/Time — The date and time the change was made.

User Name — Name of the user who made the change.

Server, Client, Instance Name — Server, Client, or Instance Name on which the change was made.

System Setting Area — The tab on which the change was made, such as Global Values.

System Setting — The setting that was changed.

New Value — The new value of the system setting.

Previous Value — The previous value of the system setting.

Time Detail

Time Detail shows punch, pay code edit, and transaction information for individual employees. The timecard data in the report is pulled from the selected time period.

Use the **Time Detail (Excel)** report if you plan to export results to Excel. The Excel version of this report is not identical to the original version of this report. It does not contain punch data, and is intended to contain only a subset of the data that is available in the original report.

Note: Only pay codes that are configured to display totals are shown in this report. The display totals setting for a pay code is part of the configuration of that pay code in Setup.

Located in:

All

Detail Genie

Timecard

Options

- **People** — You can select the query for the employees to be included in the report.
- **Time Period** — You can select the reporting period, such as Current Pay Period, or Week to Date.
- **Hours** — You can specify the hours to be reported on, including actual hours only, or actual and adjusted/historical hours.

Note: If you choose Actual, a historical edit is displayed on its effective date, but only if the "Include in totals for effective date" check box was selected when the edit was entered.

If you choose Adjusted/Historical, the report shows both actual and adjusted

hour amounts. Any historical edit is displayed on its historical date (the date further in the past).

- **Page Break between Employees** — You can choose whether to create a new page for each employee included in the report. The default is no.

Report content

- **Employee Information**
  - **Employee —** The name of the employee.
  - **ID —** The ID number of the employee.
  - **Time Zone** — The time zone to which the employee is assigned.
  - **Status** — Either Active, Inactive, or Terminated. Indicates the status of the employee during the selected time period.
  - **Status Date** — The date the given status became effective.
  - **Pay Rule** — The pay rule assigned to the employee.
  - **Primary Account** — The primary job and/or primary labor accounts assigned to the employee during the selected time period, including the start and end date of each assignment.

- **Timecard Information**
  - **Date/Time** — The date and time of the timecard entry.
  - **Apply To —** The pay code name, duration, or holiday name to which the time card entry is attributed. Also displays if there is an historical edit.
  - **In Punch** — The start time of a shift or portion of a shift.
  - **In Exc** — A letter or set of characters that indicate the exception associated with the in punch. See Exception Code Definitions on page 26 for more information.
  - **Out Punch —** The actual time that the employee finished working a shift or transferred to another cost center.

- **Out Exc** — A letter or set of character that indicates the exception associated with an out punch. See Exception Code Definitions on page 26 for more information.

- **Override Amount** — The amount of time or money specified if an override occurred.

- **Adj/Ent Amount** — The amount of time that is associated with the specified pay code.

- **Money Amount** — The amount of money that is associated with the specified pay code.

- **Day Amount** — The number of days that are associated with the specified pay code.

- **Totaled Amount** — The total amount of time for this entry after any deductions based on configured work rules.

- **Cum. Tot. Amount** — The cumulative total amount of hours after each transaction in the report.

- **Xfr/Move: Account** — The job or labor account to which the work was transferred (if applicable).

- **Comment** — The text that is attached to the punch or pay code amount entry.

- **Xfr: Workrule** — The work rule transfer used for the entry.

- **Job Summary** — The job summary section shows pay code money and hours for each of the jobs worked during the selected time period.

- **Labor Account Summary** — The labor account summary section shows pay code money, hours, and days for each of the labor accounts worked during the selected time period. Labor accounts that were transferred to are shown with an '(x)' before them.

Pay Code Summaries

- Pay code summary information is included for individual employees and, at the end of report, a grand totals section calculates pay code totals across all employees included in the report.

- **Combined Pay Code Summary** — The combined pay code summary section shows total amounts for all combined pay codes to which money or hours were attributed during the selected time period.

- **Pay Code Summary** — The pay code summary section shows total amounts for all pay codes to which money or hours were attributed during the selected time period.

- **Total Number of Employees** — The number of employees who are included in the report.

Exception codes for Time Detail report

The exceptions associated with in and out punches are abbreviated using exception codes. The definitions for each of the exception codes that may appear are:

Exception Code	Definition
CD	Canceled Deduction
CH	Core Hours Violation
EV	Early
HS	Holiday Schedule Violation
LV	Late
LE	Long
MO	Missed Out Punch
MP	Missed Punch
SE	Short
US	Unscheduled
VE	Very Early
VL	Very Late
LT	Long Total Break

Exception Code	Definition
ST	Short Total Break
SQ	Break Out of Sequence
BN	Bonus Applied

- The following types of exceptions are not abbreviated and are always spelled out completely in the reports:
  – Minimum Days Active Violation
  – Minimum Days Employed Violation
  – Work History Violation

Time Detail (Spreadsheet Export)

Time Detail (Spreadsheet Export) displays detailed data about each employee's punches, including duration and pay code edits, and time, money, and wage totals.

Located in:

All

Timecard

Options

None

Report content

On the Detail tab (one line for each employee):

- **In Punch**
- **Transfer** — Including Labor Account, Org Job, and Work Rule
- **Out Punch**
- **Paycode Amount** — Including Pay Code, Start Time, Hours, Days, and Money
- **Comment** — Including Source, Comment, and Note
- **Exception** — Including the Exception Source, Name, and Amount
- **Totaled Amount** — Including Span, Shift, Daily, and Cumulative

On the Summary tab (one line for each labor account):

- **Labor Account**
- **Pay Code**
- **Org Job**
- **Amount** — Including Hours, Days, Money, Wage

Time Off Rules

Time Off Rules shows the Time Off rules defined in Setup.

Located in:

All

Configuration

Options

None

Report content

- **Time Off Rule Name** — The name of the Time Off rule.
- **Description** — The description of the Time Off rule.
- **Contributing Shifts** — The contributing shifts rule that precedes the event and contributes to the calculation of the average shift length.
- **Multi-Shift Option** — The option selected if more than one shift exists on a day.
- **Average Type** — The method used to determine the average shift length.
- **Shift Source Type —** The type of shift used for averaging.
- **Average Shift Round/Grace** — The round and grace used for the average shift.
- **Min.Time Off** — The minimum of time off allowed.
- **Max Time Off** — The maximum of time off allowed.
- **Total Number of Time Off Rules** — The total number of rules included in the report.

Timecard Audit Trail

Timecard Audit Trail displays audit information that is related to specific timecard editor 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.

If you plan to use the report as a hardcopy backup of all your timecard data, be sure to schedule the report to run during off hours, as increasing the number of employees who are included in the report will increase the length of time the report takes to complete.

Located in:

All

Detail Genie

Timecard

Options

Audit Types — You can choose the types of timecard audits (such as added punches, deleted punches, and so on) that appear in the report.

The default selection for this option is for all timecard audit types to appear (with the exception of signoffs, requests, and approvals, which are included in the Timecard Sign-off, Request & Approval Audit Trail report).

Data Sources — You can specify the data sources that are included in the Timecard Audit Trail report. The default selection is for all data sources to be included.

The contents of the list of data sources depends on the specific configuration of your system. If you want to include only a subset of all data sources, choose

Include only selected Data Sources, and then add those sources that you want to include in the report.

Edits by Managers — You can specify the managers whose edits are included in the Timecard Audit Trail report. The default selection is for all edits to be included.

If you want to include only certain managers' edits, choose **Edits by Selected Managers,** and then add the names of those managers whose edits you want to include in the report.

Report content

- The top-level heading for each employee included in the report contains the employee's name and the employee's ID number.

- **Date/Time** — The effective date and time of the timecard edit.

- **Type** — The kind of timecard edit that was performed. For example, Add Pay Code or Add Punch.

- **Pay Code —** The pay code to which the timecard edit is assigned.

- **Amount** — The number of hours added as a duration or to a particular pay code.

- **Override/Cancel Deduction** — The type of entry that this timecard edit is replacing or canceling (if applicable).

- **Edit Date/Time** — The date and time that the timecard edit was made.

- **Account —** The account to which the timecard edit is attributed, if different from the primary account.

- **Comments** — The comment attached to the timecard edit.

- **Work Rul**e — The work rule used with the timecard edit, if different from the default work rule for the employee.

- **User** — The user name on the account of the person who made the edit.

- **Server** — The full name of the application server to which the edit was entered.

- **Client** — The client machine or device from which the edit was made. This field may contain:
  - The IP address of a PC
  - The name of a Device Manager device
  - A MobileTime device ID
  - Information about a TeleTime server for a punch initiated from a telephone
- **Datasource** — The component of the application from which the edit was made.
- **Total Number of Employees** — The total number of employees who are included in the report.

Timecard Sign-off, Request & Approval

Timecard Sign-off, Request and Approval Audit Trail displays audit information related to sign-off or approval of timecards and requests and including the date and time of the audit and who performed the action.

Located in:

All

Timecard

Options

None

Report content

- The top-level heading for each employee included in the report contains the employee's name and the employee's ID number.

- **Action Taken** — The kind of sign-off, request, or approval that was performed. For example, timecard sign-off or approval, Add Overtime Request, and Add Preliminary Overtime Approval.

- **Effective Date** — The date on which the signoff, request, or approval took effect.

- **Start Time** — The start time of an overtime request.

- **Amount** — The amount of overtime in an overtime request.

- **Edit Date/Time** — The date and time that the signoff, request, or approval was performed.

- **User** — The user name on the account of the person who performed the signoff, request, or approval.

- **Server** — The full name of the application server on which the signoff, request or approval was entered.

- **Client** — The client machine or device from which the signoff, request, or approval was made. This field may contain:

  - The IP address of a PC

  - The name of a Device Manager device

  - A MobileTime device ID

  - Information about a TeleTime server for a punch initiated from a telephone

- **Datasource** — The component of the application from which the signoff, request, or approval was made.

- **Reason** — The reason for the overtime request.

- **Comments —** Comments associated with a sign-off or approval.

- **Total Number of Employees** — The total number of employees who are included in the report.

Tip Compliance Rules

Tip Compliance Rules lists the Tip Compliance rules defined in Setup. When a Tip Compliance rule is assigned to an employee who works in a designated labor account, job, or pay code, the employee's timecard is updated with a tip pay code equivalent to the tip rate defined in the tip compliance rule.

Located in:

All

Configuration

Options

None

Report content

- **Name** — The name of the Tip Compliance rule.
- **Effective Version Dates** — The dates during which this rule is in effect.
- **Description** — A description of the rule.
- **Trigger #** — The trigger number, which contains the criteria for processing when certain conditions have been met and must be calculated into the totals.
- **Job** — The job, within a location on the organizational map, to which the rule applies.
- **Labor Account** — The labor account that triggers this Tip Compliance rule.
- **Pay Codes** — The pay code that triggers this Tip Compliance rule. If there is a labor account reported, there is not a pay code, and vice versa.

- **Allocation**
  - **Pay Code** — The pay code that receives the tip amount. The Tips module can only support Money pay codes.
  - **Tip Compliance Hourly Rate** — The tip amount reported per hour of work.

Toke Pool Rules

Toke Pool Rules lists the Toke Pool rules defined in Setup.

Located in:

All

Configuration

Options

None

Report content

- **Name —** The name of the Toke Pool rule. It appears in the Toke Amount Entry workspace and the People Editor, as well as reports and Genies.

- **Description** — A description of the Toke Pool rule.

- **Type of Pool** — The toke pool can be daily or weekly.

- **Start Day/Time** — The start time for the toke hours. If the pool is weekly, there is also a start day.

- **Pay Code for Adjustment** — The money pay code the system uses to add toke awards to employee timecards.

- **Carryover** — Indicates whether the remainder toke amounts are carried over from one day or week to another.

- **Calculate based on** — Indicates the day to which a shift belongs to when the shift crosses the toke pool divide.

Users Currently Locked Out

Users Currently Locked Out shows the user account names that are being denied access to the system.

Note: Typically users become locked out after a certain number of failed logon attempts.

Located in:

All

Configuration

Options

None

Report content

- **User Account Name** — The name of the locked out user account.
- **Lockout Start** — The time that the user was locked out. Shows "User Permanently Locked Out" if the user has no scheduled reset.
- **Scheduled Reset** — The time that the user will be able to reconnect to the system. This is equal to the Lockout Start time plus the prescribed Lockout duration as set in the user's logon profile.

Weekly Rest

Weekly Rest shows the minimum amount of uninterrupted rest required per week for each selected employee, and indicates whether the employee is in violation for any of the weeks included in the report.

Note: Employees cannot opt out of the minimum requirements for weekly rest, as they can for some of the other Working Time Directive rules.

Located in:

All

Working Time Directive

Options

Each Working Time Directive rule includes default settings for the options that are used to generate Working Time Directive reports. You can override the default settings for the following options:

- **First Day of Week** — The start day of the work week. Each week included in the report begins on this day.

- **Report content** — Choose to include all employees or only those in violation of the Working Time Directive rules.

- **Weekly Rest Period** — The number of days to include in the reference period for the report. You can choose 7, 14 with one rest period required, or 14 with two rest periods required.

Report content

- **Employee Name** — The name of the employee.

- **ID** — The ID number of the employee.

- **Home Account** — The primary labor account assigned to the employee during the selected time period.

- **Young/Adult** — Indicates whether the employee is classified as an adult or a young worker.
- **Weekly Minimum Rest** — The minimum amount of uninterrupted rest required per day for the employee.
- **Week Starting** — The start date of a week that includes a violation.
- **Week Ending** — The end date of a week that includes a violation.
- **Actual Rest Length** — The length of the longest uninterrupted rest period in the given week.
- **Violation/Flag** — Indicates whether the employee is in violation of the assigned Working Time Directive rule for the given week. This column may also include an NE (New Employee) or ID (Insufficient Data) flag.

  The Insufficient Data flag indicates that the current worked time limit only applies to a part of the Average Period. This happens when an employee has chosen to opt out of the Working Time Directive rule, or when the properties of the worker change to an extent that a certain rule only applies to a part of the Average Period.

Note: Hours added as a pay code edit are appended to the first shift of the day. It is important to note that hours attributed to excluded pay codes (for example, annual leave) do not count as rest.

Weekly Working Time

Weekly Working Time shows the average working hours per week for each selected employee, and indicates whether the employee is in violation of the maximum weekly hours for the given Average Period.

Use **Weekly Working Time (Data)** to generate raw, unformatted data to be used in an Excel spreadsheet.

Located in:

All

Working Time Directive

Options

Each Working Time Directive rule includes default settings for the options that are used to generate Working Time Directive reports. You can override the default settings for the following options:

*   **First Day of Week** — The start day of the work week. Each week included in the report begins on this day.

*   **Max Weekly Hours** — The maximum number of hours employees can average per week before they are in violation.

*   **Number of Iterations** — The number of times to run the report. Each iteration begins and ends one week after the previous iteration. The results of each iteration are included in a single output of the report.

    For example, if a rule calls for a 17-week Average Period and the first Average Period starts on January 1st, the second iteration of the Average Period will begin on January 8th and end a week after the period that started on January 1st. Including multiple iterations in a report allows you to view average hours per week for more than one reference period.

*   **Report content** — Choose to include all employees or only those in violation of the Working Time Directive rules.

- **Work Week Length** — The number of days in a work week (between 1 and 7 is allowed). Days after this number but before the next First Day of Week are ignored.

Report content

- **Employee Name** — The name of the employee.
- **ID** — The ID number of the employee.
- **Home Account** — The primary labor account assigned to the employee during the selected time period.
- **Period Start** — The beginning of the Average Period. This date corresponds to the occurrence of the chosen First Day of Week.
- **Period End** — The end of the Average Period. This date reflects the length of the work week and the number of weeks included in the Average Period. The end date does not reflect the end date of the Time Period chosen for the report.
- **Total Work Hours/Period** — The total number of hours worked in the Average Period.
- **Avg. Work Hours/Week** — The average number of hours worked per week in the Average Period.
- **Total Excl. Hours/Period** — The total number of hours excluded from the Average Period because the hours were taken as leave. Full days taken as leave are not included in the averaging. Instead, the Average Period is extended by a number of days equivalent to the number of days taken as leave.

  Note: The system counts an entire day as leave if the number of excluded hours for a given day is greater than the exclusion threshold set in the employee's Working Time Directive rule.

- **Total Equiv. Days/Period** — The total number of days with worked hours added to the Average Period because of days counted as leave.
- **Violation/Fl** — Indicates whether the employee is in violation of the assigned Working Time Directive rule for the given Average Period. This column may also include an NE (New Employee) or ID (Insufficient Data) flag.

The Insufficient Data flag indicates that the current worked time limit only applies to a part of the Average Period. This happens when an employee has chosen to opt out of the Working Time Directive rule, or when the properties of the worker change to an extent that a certain rule only applies to a part of the Average Period.

Note: Employees who have chosen to opt out of the Weekly Working Time rule are indicated with an asterisk (*).

Work Rule Data Access Profiles

Work Rule Data Access Profiles shows all the work rule data access profiles that are configured in Setup along with a list of the work rules available for each of those profiles.

Located in:

All

Configuration

Options

None

Report content

- **Name** — The name of the work rule data access profile.
- **Description** — The description of the work rule data access profile as defined in Setup.
- **Selected Work Rule(s)** — The list of work rules that are available to the employees who are assigned to this work rule data access profile.
- **Total number of work rule(s) selected for [work rule data access profile name]** — The number of work rules that are selected for this work rule data access profile.

Work Rules

Work Rules lists and defines all the work rules that are configured in Setup.

Work rules are groups of parameters that control similar time and attendance functions that apply specific payroll rules to shifts. These rules determine how employee hours accrue.

Located in:

All

Configuration

Options

None

Report content

- **Work Rule Name** — The name of the work rule.
- **Effective Dates** — The beginning and end date for this configuration of the rule.
- **Rounding Rule** — The name of the rounding rule associated with this work rule.
- **Exception Rule** — The name of the exception rule associated with this work rule.
- **Shift Guarantee** — The name of the shift guarantee associated with this work rule.
- **Pay Code for Unapproved OT** — The pay code assigned to unapproved over time that is worked by employees assigned to this work rule.
- **Bonus/Deduction Rule(s)** — The name of the bonus/deduction rule(s) associated with this work rule.

- **Deviation Rule(s)** — The name of the deviation rule(s) associated with this work rule.

- **Overtime Rule(s)** — The name of the overtime rule(s) associated with this work rule.

- **Core Hours Rule(s)** — The name of the core hours rule(s) associated with this work rule.

- **Call-in Rule** — The name of the call-in rule associated with this work rule.

- **Pay Code Distribution** — The name of the pay code distribution, or pay plan, associated with this work rule.

- **Day Divide** — The day divide parameter for this work rule.

- **Break Rule(s)** — The name of the break rule(s) associated with this work rule.

- **Majority Rule(s)** — The name of the majority rule(s) associated with this work rule.

- **Zone Rule(s)** — The name of the zone rule(s) associated with this work rule.

- **Total Number of Work Rules** — The total number of work rules that are configured in Setup.

Workforce Requirement Analysis

Displays the calculation of the workforce requirements for a selected job and day. This report allows the user to verify the period level Workforce Central calculation, including raw, rounded, minimum coverage, and adjusted requirement values.

Located in:

All

Forecaster

Options

None

Report content

- **Location** — Location name appears at the top row of the report. Each job in the location begins on a new page.

- **Raw Req** — The raw headcount requirement, calculated by the Forecast Manager.

- **Rnd Req** — The rounded headcount requirement, calculated by the Forecast Manager. This number is the result of the raw requirement, applied rounding rules, and minimum-maximum coverage requirements. This Rnd-Req value is always a whole number.

- **Adj Req** — The adjusted headcount requirement. This number contains the edited and saved values in the labor forecast section of the Forecast Planner. This is the final headcount number used by the Auto-Scheduler to assign employees to schedules.

- **Unalloc/Unasgnd** — The difference, positive or negative, between the adjusted requirement and the raw requirement. This value plus the rounded headcount requirement (Rnd Req) value always adds up to the raw requirement (Raw Req).

Young Worker

Young Worker shows young workers that are in violation of the young worker limits for daily and weekly hours worked. The limits are fixed amounts per day and week and are not averaged.

Use **Young Worker (Data)** to generate raw, unformatted report data for use with Microsoft Excel.

Located in:

All

Working Time Directive

Options

Each Working Time Directive rule includes default settings for the options that are used to generate Working Time Directive reports. You can override the default settings for the following options:

- **First Day of Week —** The start day of the work week. Each week included in the report begins on this day.

- **Max Daily Hours —** The maximum number of hours a young worker is allowed to work in a day.

- **Max Weekly Hours** — The maximum number of hours a young worker is allowed to work in a week.

- **Number of Iterations** — The number of times to run the report. Each iteration begins and ends one week after the previous iteration. The results of each iteration are included in a single output of the report.

- **Work Week Length** — The number of days in a work week (between 1 and 7 is allowed). Days after this number but before the next First Day of Week are ignored.

Report content

- **Employee Name —** The name of the employee.
- **ID** — The ID number of the employee.
- **Home Account** — The primary labor account assigned to the employee during the selected time period.
- **Period Start** — The start date of the week that contains the violation.
- **Period End** — The end date of the week that contains the violation.
- **Violation Period Weekly/Daily** — Indicates whether the violation is against a weekly or daily limit.
- **Period/Date** — The date of the violation.
- **Total Normal Hours** — The maximum number of hours allowed in a day or week.
- **Total Worked Hours** — The actual number of hours worked in the given day or week.
- **Violated Hours** — The number of hours worked in excess of the young worker limit for a day or week.

Zone Rules

Zone Rules lists and defines all the zone rules that are configured in Setup.

Located in:

All

Configuration

Options

None

Report content

Note: Much of the content in the Zone Rules report is based on the zone type assigned to each zone rule.

For a description of a particular value in the report, refer to the online Help for Setup and look up zones and zone types.

- **Zone Type —** The type of zone rule.
- **Zone Rule Name —** The name of the zone rule.
- **Associated with Work Rules** — The work rules that contain this zone rule.
- **Total Number of Zone Rules** — The number of zone rules that are configured in Setup.

Scheduler reports

Scheduler report descriptions are in alphabetical order by title.

Notes:

In the system, reports might be listed in one or more different categories. Each report lists the categories in which it appears in the system.

Common options, including **Description**, **People**, **Time Period**, and **Output Format** are not included in Options sections.

Click a report for details:

Actual vs. Schedule by Job

Actual vs. Schedule by Job shows the actual, scheduled, and projected hours and wages by job for each employee who worked that job during the selected time period.

Use this report to see how your schedule compares with actual totals and whether the projected amounts are within your budget. It is important that the totalizer is set to guarantee totals far enough into the future to cover the time period that you plan to use with this report.

Note: The projected and variance values in this report are valid only for the current time period.

Note: The (Data) version of this report produces raw, unformatted data about actual, scheduled, and projected hours and wages by job. The data is intended for use with Microsoft Excel. The data is also formatted for display and printing in the Actual vs. Schedule by Job report.

Located in:

All

Detail Genie

Scheduler

Options

Pay Codes — You can choose the pay codes that are represented in the report. By default, all the pay codes that are configured to display totals are selected.

Note: You can select only pay codes that are configured to display totals. The display totals setting for a pay code is part of the configuration of that pay code in Setup.

Report content

- **Pay Code** — The name of the pay code that is associated with the hours and wages.

- **Actual Hours** — The number of hours that the employee has worked within the specified pay code and on the specified job.

- **Scheduled Hours** — The number of hours that the employee is scheduled to work within the specified pay code and on the specified job.

- **Projected Hours** — The number of hours that the employee is projected to work within the specified pay code and on the specified job.

Note: Projected hours are the number of actual hours plus any remaining scheduled hours calculated together. This calculation includes any changes in overtime required as a result of different-than-scheduled actual hours.

Note: To populate data for Projected Hours, you must select **Store projected totals** in the database in **Setup > Pay Policies > Pay Rules.**

- **Variance Hours** — If all of the selected time period is in the past, then this column reports scheduled hours minus actual hours. If any of the selected time period is in the present or future, then this column reports scheduled hours minus projected hours.

Note: A negative variance is shown in parentheses and indicates that the employee is projected to work more hours than he or she was scheduled for.

- **Example:**

The employee whose hours are shown below is scheduled to work 8 hour days, Monday through Friday, and has just finished a Tuesday shift that included 2 hours of overtime. The information in the table reflects what would appear for the employee if this report was run on Tuesday night (after the employee completed his or her shift) and was set to include the

current pay period (which, in this case, is one week long from Sunday to Saturday).

Pay Code	Actual Hours	Scheduled Hours	Projected Hours	Variance Hours
Regular	18	40	42	(2)

- **Actual, Scheduled, Projected, and Variance Wages** — Same as Actual, Scheduled, Projected, and Variance Hours, but the amount of wages instead of number of hours.

  Note: In order to populate data for Projected Wages, you must select **Store projected totals in the database** in Setup > Pay Policies > Pay Rules.

- **Worked Job** — The name of the job that is associated with the hours and wages.

- **Totals for Job** — The total amount of hours and wages of each type for the job.

- **Grand Totals** — The total amount of hours and wages of each type for all employees regardless of the job.

- **Total Number of Employees** — The number of employees whose hours are included in the report.

Actual vs. Schedule by Labor Account

Actual vs. Schedule by Labor Account shows the actual, scheduled, and projected hours and wages by labor account for each employee who worked that labor account during the selected time period.

Run this report for the current pay or schedule period to see how your schedule compares with actual totals and whether the projected amounts are within your budget. It is important that the totalizer is set to guarantee totals far enough into the future to cover the time period that you plan to use with this report.

Note: The projected and variance values in this report are valid only for the current time period.

Note: The (Data) version of this report produces raw, unformatted data about actual, scheduled, and projected hours and wages by job. The data is intended for use with Microsoft Excel. The data is also formatted for display and printing in the Actual vs. Schedule by Job report.

Located in:

All

Detail Genie

Scheduler

Options

Pay Codes — You can choose the pay codes represented in the report. By default, all the pay codes that are configured to display totals are selected.

Note: Only pay codes configured to display totals are selectable. The display totals setting for a pay code is part of the configuration of that pay code in Setup.

Report content

- **Pay Code** — The name of the pay code that is associated with the hours and wages.

- **Actual Hours** — The number of hours that the employee has worked within the specified pay code and in the specified labor account.

- **Scheduled Hours** — The number of hours that the employee is scheduled to work within the specified pay code and in the specified labor account.

- **Projected Hours —** The number of hours that the employee is projected to work within the specified pay code and in the specified labor account.

Note: Projected hours are the number of actual hours plus any remaining scheduled hours calculated together. This calculation includes any changes in overtime required as a result of different-than-scheduled actual hours.

Note: In order to populate data for Projected Hours, you must select **Store projected totals in the database** in **Setup > Pay Policies > Pay Rules**.

- **Variance Hours** — If all of the selected time period is in the past, then this column reports scheduled hours minus actual hours. If any of the selected time period is in the present or future, then this column reports scheduled hours minus projected hours.

Note: A negative variance is shown in parentheses and indicates that the employee is projected to work more hours than he or she was scheduled for.

  – **Example**

    The employee whose hours are shown below is scheduled to work 8 hour days, Monday through Friday, and has just finished a Tuesday shift that included 2 hours of overtime. The information in the table reflects what would appear for the employee if this report was run on Tuesday night (after the employee completed his or her shift) and was set to include the

current pay period (which, in this case, is one week long from Sunday to Saturday).

Pay Code	Actual Hours	Scheduled Hours	Projected Hours	Variance Hours
Regular	18	40	42	(2)

- **Actual, Scheduled, Projected, and Variance Wages** — Same as Actual, Scheduled, Projected, and Variance Hours, but the amount of wages instead of number of hours.

Note: In order to populate data for Projected Wages, you must select **Store projected totals in the database** in **Setup > Pay Policies > Pay Rules**.

- **Worked Labor Account** — The name of the labor account that is associated with the hours and wages.

- **Totals for Labor Account** — The total amount of hours and wages of each type for the labor account.

- **Grand Totals** — The total amount of hours and wages of each type for all employees regardless of labor account.

- **Total Number of Employees —** The number of employees whose hours are included in the report.

Actual vs. Scheduled Summary by Labor Account

Actual vs. Schedule by Labor Account shows the actual, scheduled, and projected hours and wages for all accounts and for each individual labor level rollup that you select in the report options.

Run this report for the current pay or schedule period to see how your schedule compares with actual totals and whether the projected amounts are within your budget. It is important that the totalizer is set to guarantee totals far enough into the future to cover the time period that you plan to use with this report.

Note: The projected and variance values in this report are valid only for the current time period.

Note: The (Data) version of this report produces raw, unformatted data about actual, scheduled, and projected hours and wages by job. The data is intended for use with Microsoft Excel. The data is also formatted for display and printing in the Actual vs. Schedule by Job report.

The Actual vs. Schedule Summary by Labor Account with Graph includes similar data displayed in graphs and table.s

Located in:

All

Detail Genie

Scheduler

Options

Rollup Hours By — Choose the labor level or labor level combinations to group data in the report.

Labor Level Entries — Choose to show the labor level name or the labor level description in the report.

Pay Codes — You can choose the pay codes represented in the report. By default, all the pay codes that are configured to display totals are selected.

Note: Only pay codes configured to display totals are selectable. The display totals setting for a pay code is part of the configuration of that pay code in Setup.

Report content

- **Pay Code** — The name of the pay code that is associated with the hours and wages.
- **Actual Hours** — The number of hours that the employee has worked within the specified pay code and in the specified labor account.
- **Scheduled Hours** — The number of hours that the employee is scheduled to work within the specified pay code and in the specified labor account.
- **Projected Hours** — The number of hours that the employee is projected to work within the specified pay code and in the specified labor account.

Note: Projected hours are the number of actual hours plus any remaining scheduled hours calculated together. This calculation includes any changes in overtime required as a result of different-than-scheduled actual hours.

Note: In order to populate data for Projected Hours, you must select **Store projected totals in the database** in **Setup > Pay Policies > Pay Rules.**

- **Variance Hours** — If all of the selected time period is in the past, then this column reports scheduled hours minus actual hours. If any of the selected time period is in the present or future, then this column reports scheduled hours minus projected hours.

Note: A negative variance is shown in parentheses and indicates that the employee is projected to work more hours than he or she was scheduled for.

– **Example**

The employee whose hours are shown in the following table is scheduled to work 8 hour days, Monday through Friday, and has just finished a

Tuesday shift that included 2 hours of overtime. The information in the table reflects what would appear for the employee if this report was run on Tuesday night (after the employee completed his or her shift) and was set to include the current pay period (which, in this case, is one week long from Sunday to Saturday).

Pay Code	Actual Hours	Scheduled Hours	Projected Hours	Variance Hours
Regular	18	40	42	(2)

- **Actual, Scheduled, Projected, and Variance Wage**s — Same as Actual, Scheduled, Projected, and Variance Hours, but the amount of wages instead of number of hours.

  Note: In order to populate data for Projected Wages, you must select **Store projected totals in the database** in Setup > Pay Policies > Pay Rules.

- **Totals** — The total amount of hours and wages of each type for the labor account.

All Zone

All Zone shows the following data for a single department in multiple locations for multiple schedule zones:

- Planned and scheduled levels for each job group in each location

- Variance between the planned and schedule values for each job group

- Total planned and scheduled levels for all job groups

- Actual volume (census)

- Productivity measures: budgeted, projected, and actual hours for each unit volume

- Names and job category of employees who are scheduled for each department

Use this report to staff multiple units within volume and budgetary guidelines.

Note: This report supports only zone sets. If shift sets are included, data can be inaccurate. For example, if the report includes data for employees who work a shift that is in two or more zones or days, the entire shift is included on the day when the shift starts.

If the location has no associated workload or workloads that are based only on shift sets or are based on labor volumes, the report is blank.

To keep non-productive time (for example, vacation) from the report, enter it as the appropriate pay code in Scheduler and the timecard.

For information about schedule zone sets, refer to the *Scheduler System Administrator Guide*.

Located in:

All

Detail Genie

Scheduler

Timecard

Report content

The report sorts the following data by zone and by day of week:

- **Job groups** — Job groups cluster jobs at this location into categories; for example manager, registered nurse. Each job group has the following parameters:

  – **Planned (Pln)** – Workload requirement that covers this location and zone

  – **Scheduled (Sch)** The actual number of staff who are scheduled for this location and zone; calculated as the total hours scheduled for all employees divided by the time period of the zone.

  – **Variance (Var)** – Difference between the workload requirement and the actual number of staff who are scheduled. A negative number indicates undercoverage. A positive number indicates overcoverage.

- **Totals (TOT)** — Total planned and scheduled staff and the variance. A negative number indicates undercoverage. A positive number indicates overcoverage.

- **Volume (VOL)** — Actual or weighted volume (from the Workload Planner > Calendar tab). For health care, volume is the patient census.

- **Budgeted (BUD)** — Total baseline workload hours (from the Workload Planner > Calendar tab) for the time period divided by budgeted or weighted budgeted volume (from the Workload Planner > Volume tab)

- **Projected (PRO)** — Total adjusted workload hours (from the Workload Planner > Calendar tab) for the time span divided by projected or weighted projected volume (from the Workload Planner > Volume tab)

- **Actual (ACT) —** Total actual productive hours (from the paid hours on the timecards) for the time span divided by actual or weighted actual volume (from the Workload Planner > Volume tab)

Tip: If an employee's schedule overlaps two locations, that employee is paid only for the actual hours worked.

Do not schedule employees for overlapping hours. Otherwise, this report can have different actual and scheduled hours.

- **Scheduled employees** — Employees who are scheduled to work on this day, zone, and location. Sorted by job, listed alphabetically by name with scheduled job and shift.

  – Shifts shown by shift label or shift start time

  – Job transfers indicated with an x

  – Employee names truncated at 20 characters

  – Job name and shift label or start time

- **Print formats**

  – Weekly – 7 days on 8 1/2 x 11 inch (21.6 x 27.9 cm) page, landscape orientation. No limitation on the range of dates. Each week starts a new page. The data can be incomplete for dates in the future.

ANSI/API RP 755: Fatigue (Spreadsheet Export)

ANSI/API RP 755: Fatigue (Spreadsheet Export), a Fatigue Management report designed for the American petroleum industry, shows exceptions to fatigue management schedule rules by employee for a selected location and period of time.

Note: The Fatigue Management feature must be enabled to see content in this report.

Located in:

All

Scheduler

Options

None

Report content

Date of Exception

Exception Description

Employee

Pay Rule

Org Path

Work Set Type

Severity

Work Set

Type of Override

Reason for Override

Start Date of Override

End Date of Override

Scheduled Start Time

Scheduled End Time

Actual Start Time

Actual End Time

Total Hours Worked

Comments by Employee

Comments by Employee shows all comments that are made by or for employees at home locations on selected dates.

Note: This report includes comments only for employees whose people record defines their primary job, not for transferred employees.

Use this report for the following:

– To review all comments of employees at their home location

– See patterns among employees

– Analyze why employees are absent, stray from their schedule, or miss punches

– Decide whether to change levels or schedules

Located in:

All

Detail Genie

Scheduler

Options

None

Report content

- **Employee** — Names in header above the comments. Sorted alphabetically by last name. The header includes the complete path of the employee's home location, as well as the employee's hire date and ID number.

- **Home Location** — The string for the employee's home location is in the same header as the employee's name.

- **Hire Date** — In the same header row as the employee's name

- **Employee ID** — Employee's identification number is in the same header as the employee's name.

- **Type** — The following action performed by the person who entered the comment:

  - **PC Sched (Pay Code from Schedule)** — A pay code in the employee's schedule; entered in Scheduler

  - **PC TCard (Pay Code from Timecard)** — A pay code in the employee's timecard; entered in the timekeeping application

  - **Pay Sched (Pay from Schedule)** — Pay from a schedule action; entered from QuickFind to place the scheduled shift in the employee's timecard

  - **Punch** — An in-punch or out-punch

  - **Shift** — A shift on the employee's schedule; entered in Scheduler

- **Comment** — Sorted by group, listed alphabetically by name

  - When one person enters the same comment more than once at the same location (for example, for an in-punch and out-punch), each entry takes a row.

- **Time** — Start and end times of the shift or schedule that has the comment

  - If a pay code on a timecard, start and end times are blank.

  - For punches, shows in-punch and out-punch times. If only one punch, the missing time is blank.

- **Hours** — One of the following:

  - **Sched** (Scheduling) – The hours come from Scheduler

  - **TCard** (Timecard) – The hours come from the timecard

  The report includes subtotals for Scheduling and Timecard hours and the grand total for all hours.

- **Pay Code**

  - If comment is Pay Code from Schedule or Timecard, displays the pay code.

  - If comment is Shift, Punch, or Pay from Schedule, pay code is blank.

- **Xfer Job (Transfer Job)** — If the shift or shift segment is a transfer, displays the job to which the employee transferred.

  – For shifts with more than one transfer shift segment, displays only the first segment.

  – If the shift has a work rule transfer, transfer job is blank.

- **Print formats**

  – Daily – Comments for each day on 8 1/2 x 11 inch (21.6 x 27.9 cm) page, landscape orientation.

Comments by Location

Comments by Location shows all employee comments at selected locations and dates. It uses primary jobs as locations.

Note: This report includes comments only for employees whose people record defines their primary job, not for transferred employees.

Use this report for the following:

– To reveal usage patterns of comments at different locations

– To analyze why employees work different schedules or are absent

– To decide whether to change levels or schedules

Located in:

All

Detail Genie

Scheduler

Timecard

Options

None

Report content

This report sorts the following data by comment type, then groups the data by combined comment and location:

• **Comment** — Name of comment in header above the comment detail. Sorted by location, listed alphabetically by name.

– When one person enters the same comment more than once at the same location (for example, for an in-punch and out-punch), each entry takes a detail row.

- – When one person enters the same comment at more than one location, each entry takes a detail row for those locations.
- **Location** — The complete path for the location is in the same header as the comment.
  - – **Type** — The following action performed by the person who entered the comment:
  - – **PC Sched (Pay Code from Schedule)** — A pay code in the employee's schedule; entered in Scheduler
  - – **PC TCard (Pay Code from Timecard)** — A pay code in the employee's timecard; entered in the timekeeping application
  - – **Pay Sched (Pay from Schedule)** — Pay from a schedule action; entered from QuickFind to place the scheduled shift in the employee's timecard
  - – **Punch** — An in-punch or out-punch
  - – **Shift** — A shift on the employee's schedule; entered in Scheduler
- **Date** — Date when the comment was entered
- **Employee** — Last name first
- **Time** — Start and end times of the shift or schedule that has the comment
  - – If a pay code on a timecard, start and end times are blank.
  - – For punches, shows in-punch and out-punch times. If only one punch, the missing time is blank.
- **Hours** — One of the following:
  - – **Sched** (Scheduling) – The hours come from Scheduler
  - – **TCard** (Timecard) – The hours come from the timecard

  The report includes subtotals for Scheduling and Timecard hours and the grand total for all hours.
- **Pay Code**
  - – If comment is Pay Code from Schedule or Timecard, displays the pay code.
  - – If comment is Shift, Punch, or Pay from Schedule, pay code is blank.

- **Xfer Job (Transfer Job)** — If the shift or shift segment is a transfer, displays the job to which the employee transferred.
  - For shifts with more than one transfer shift segment, displays only the first segment.
  - If the shift has a work rule transfer, transfer job is blank.
- **Print formats**
  - **Daily** – Comments for each day on 8 1/2 x 11 inch (21.6 x 27.9 cm) page, landscape orientation.

Coverage Detail - Weekly

Coverage Detail - Weekly shows coverage from the Workload Planner and Scheduler for each job in a location by shift or schedule zone.

This report shows scheduled coverage with variance from the Workload Plan/ Forecasting Plan, by location for each job in 15-minute interval level details. This report can be used to manage coverage by location, job or time period. It displays 7 days per page and prints on 8.5 x 11 paper.

Use the coverage data to avoid under or over. If locations do not have coverage data, the report shows no schedule at those locations.

Notes: The selected location must have an associated workload.

This report can display coverage that is based on different types of workload. However, it does not display more than one type for a single organizational job. For example, a job has a workload that is based on a mix of labor volumes, shift sets, or zone sets. The report displays only the workload that is based on, in order, labor volume, shift set, or zone set for that organizational job.

Located in:

All

Detail Genie

Scheduler

Timecard

Options

None

Report content

- **Location** — Name on the top row; the complete path for the location on the second row. Each location starts a new page.

- **Span** — Shows schedule zones if configured. Otherwise, shows the shifts from the workload shift sets. Sorted in alphanumeric order.

  – If both workload shift sets and schedule zone sets are configured for a location, shows coverage for schedule zones only.

  – Coverage Detail report – Shows 15-minute intervals

- **Job** — Sorted by order number, if configured. Otherwise, sorted alphabetically.

- **Planned** — Workload requirement from the plan that is defined in the Workload Planner. The adjusted plan, if configured. Otherwise, the baseline plan.

- **Variance** — Difference between the workload requirement and the actual number of staff who are scheduled. A negative number indicates undercoverage. A positive number indicates overcoverage.

- **Print formats**

  – **Weekly** – 7 days on 8 1/2 x 11 inch (21.6 x 27.9 cm) page, landscape orientation

  – **Monthly** – 28 days on 8 1/2 x 14 inch (21.6 x 35.6 cm) page, landscape orientation

Coverage - Monthly

Coverage Monthly shows scheduled coverage, with variance from the staffing plan, by location for each job and shift or schedule zone.

Use this report to manage coverage by location, job, or time period.

It displays 28 days per page and prints on 8.5x11 paper.

Note: Locations must have Schedule Zone Sets or Shift Sets defined, or the report will fail.

Coverage - Weekly

Coverage Weekly shows scheduled coverage, with variance from the staffing plan, by location for each job and shift or schedule zone.

Use this report to manage coverage by location, job, or time period.

It displays 28 days per page and prints on 8.5x11 paper.

Note: Locations must have Schedule Zone Sets or Shift Sets defined, or the report will fail.

Employee Availability (Spreadsheet Export)

Employee Availability (Spreadsheet Export) shows employee availability for a selected period of time.

Located in:

All

Scheduler

Options

None

Report content

For each employee, the report shows:

- **Availability** — Indicates whether employee is available.
- **Availability date** — The date on which the employee is available.
- **Availability start** — The start time of availability.
- **Availability end** — The end time of the availability.
- **Availability duration hours** — The number of hours that the employee is available.
- **Availability duration minutes** — The number of minutes that the employee is available.

Employee Schedule

Employee Schedule shows the schedules of employees – both for the primary job at a location and shifts at another location – sorted by job.

Use this report for the following:

– For organizations that use an organizational map and job assignments for scheduling.

– To track schedules. If you post this report before the schedule period, employees can see their schedules and sign up for shifts.

– Answers the manager's question, "Where are my employees working?"

– Answers the employees' question, "Where and when am I working?"

You can generate the report with Monthly or Weekly data.

Note: The (Data) version of this report produces raw, unformatted data about actual, scheduled, and projected hours and wages by job. The data is intended for use with Microsoft Excel.

Located in:

All

Scheduler

Timecard

Options

None

Report content

• **Location** — Name on the top row; the complete path for the location on the second row. Each location starts a new page.

- **Employee** — Sorted by job, listed alphabetically; includes employees who have no scheduled shifts during the time period
- **Job** — Sorted by sort order number, if configured. Otherwise, sorted alphabetically.
- **Shifts**
    - **Weekly report** – Shifts by start and end time; includes hours and money amounts of pay codes
    - **Monthly report** – Shifts by shift label

        Off shift segments in italics followed by the letter o

        Unavailable shift segments in italics followed by the letter u

        Transfers in italics followed by the letter x
- **Print formats**
    - **Weekly** – 7 days on 8 1/2 x 11 inch (21.6 x 27.9 cm) page, landscape orientation
    - **Monthly** – 28 days on 8 1/2 x 14 inch (21.6 x 35.6 cm) page, landscape orientation

Float

Float shows the floats – employees who transfer a shift or segment to or from locations – on selected dates.

Use this report to:

- See who transfers to or from locations
- Compare the number of In floats and Out floats

The report can reveal work patterns that need changes to levels, jobs, or schedules.

Located in:

All

Detail Genie

Scheduler

Timecard

Options

None

Report content

- **Location** — The complete path for the location is in the header above the In and Out floats.
- **Date** — The date when the floats occur is in the header below the location. The floats are grouped by date.
- **Float** — Groups In floats together, followed by Out floats, for each day.
  – Employees who transfer a shift or segment *to* the location are an *In float*.
  – Employees who transfer a shift or segment *from* the location are an *Out float*.

- – Employees who transfer a shift or segment to a different job, but at the same location, are not in this report.
- • **ID** — Employee's identification number
- • **Employee** — Last name first
- • **Worked**
  - – **In floats** — The string for the organizational location of the employee's primary job
  - – **Out floats** — The string for the organizational location where the employee worked
- • **Job**
  - – **In floats** — The employee's primary job
  - – **Out floats** — The job the employee worked
- • **S/A** — Indicates whether the start and end times are Scheduled (S) or Actual (A).
- • **Sched/Actual** — The scheduled or actual start and end times
  - – **If Scheduled** — The start and end times of the employee's scheduled shift. If the shift has more than one transfer segment, the scheduled start and end times of each segment are in separate rows.
  - – **If Actual** — The start and end times from the timecard, even if the employee has both scheduled shifts, and punches with transfers on the date.
- • **Hrs (Hours)**
  - – **Punch data** — The actual hours, based on the start and end times from the timecard
  - – **No punch data** — The elapsed time of the scheduled shift, based on the start and end times of the shift
- • **Totals**
  - – The last row for each date displays the total daily hours of In and Out floats.
  - – Net value is the Total in minus Total out hours.

- **Print formats**
    - 8 1/2 x 11 inch (21.6 x 27.9 cm) page, portrait orientation.

Hours per Volume

Hours per Volume displays the hours/volume statistics from the Hours/Volume tab, in the form of a report that you can print.

Use this report to compare scheduled and actual use of resources by way of budgeted, targeted, scheduled, and actual, hours/volume data that measures labor productivity.

The scheduled hours/volume data alerts you to differences between scheduled hours and planned coverage for anticipated volume.

Note: In health care, hours/volume can be called Hours per Patient Day (HPPD).

Located in:

All

Scheduler

Options

Workload Data Type — All are selected by default, including Scheduled, Budgeted, Target, Actual, and Variance

Report content

- **Location** — The report groups data by location. The complete path for the location is in the header of each group.

  Shading indicates:

  – **Gray** — Parent node

  – **White** — Child node that has no children nodes

- **Date** — In the column headers

- **Actual** — Configured as previously worked or paid hours or volume

  – **Direct** – Hours per volume that complete the main tasks of the job

- **Indirect** – Hours per volume that do not directly complete the main tasks
- **Total hours** = Direct + Indirect hours

  Regular shift hours minus unpaid break time, job transfers, unavailable, and time-off segments

  Pay codes plus Scheduled Hours Type that is included in the sum of daily scheduled hours

- **Volume** – Used by the matrix of the Workload Generator to generate a plan in the Workload Planner. The information can be imported or entered manually. Applies to all selected locations.

  If weighted volume, weighted by criteria such as patient acuity.

  Label can be customized; for example, Volume replaced by Census.

- **Budgeted** — Baseline hours or volume from the Workload Planner
  - **Direct** – Budgeted hours per volume that complete the main tasks of the job
  - **Indirect** – Budgeted hours per volume that do not directly complete the main tasks
  - **Total hours** – Either:

    Baseline hours

    Budgeted hours/volume multiplied by budgeted volume
  - **Volume** – Largest or average value from the locations; weighted or unweighted

- **Scheduled** — Adjusted hours or volume from the Workload Planner

  Regular shift hours minus unpaid break time, job transfers, unavailable and time-off segments

  Pay codes plus Scheduled Hours Type that is included in the sum of daily scheduled hours

  - **Direct** – Adjusted hours per volume that complete the main tasks of the job
  - **Indirect** – Adjusted hours per volume that do not complete the main tasks

- **Total hours** – Adjusted hours per volume of all jobs for selected locations and jobs

  Regular shift hours minus unpaid break time, job transfers, unavailable, and time-off segments

  Pay codes plus Scheduled Hours Type that is included in the sum of daily scheduled hours

- **Volume** – Adjusted volume; normally imported into the Workload Planner when scheduling

- **Target** — Projected hours or volume from the Workload Planner

  - **Direct** – Projected hours per volume that complete the main tasks of the job

  - **Indirect** – Projected hours per volume that do not directly complete the main tasks

  - **Total hours** – Either:

    Projected hours

    Budgeted hours/volume multiplied by the budgeted volume

  - **Volume** – Projected volume from the Workload Planner or Workload Generator; from the largest or average value from the locations; weighted or unweighted

- **Variance** — Compares headcount in the current schedule and requirements in the plan

  - **Direct** – Hours per volume that complete the main tasks of the job

    Past dates — actual minus budgeted hours/volume

    Current and future dates — scheduled minus budgeted hours/volume

  - **Indirect** – Hours per volume that do not directly complete the main tasks

    Past dates — actual minus budgeted hours/volume

    Current and future dates — scheduled minus budgeted hours/volume

  - **Total hours**

    Past dates — actual minus budgeted hours

Current and future dates — scheduled minus budgeted hours

– **Volume**

Past dates — actual minus budgeted volume

Current and future dates — scheduled minus budgeted volume

Note: Cells are blank if data is missing.

- **Print formats**

    – **Weekly** – Up to 7 days, for each location and day on 8 1/2 x 11 inch (21.6 x 27.9 cm) page; portrait orientation.

Location Schedule

Location Schedule shows the weekly, monthly, or 6-week schedule for all people who are scheduled to work at a location regardless of primary job.

Variations of the report include:

- Location Schedule - Monthly
- Location Schedule - Monthly (data)
- Location Schedule - Weekly
- Location Schedules - Weekly (data)

For the Auto-Scheduler, the Location Schedule Detail-Weekly shows detail in 15-minute intervals and can include fields such as breaks, availability, and wages.

Note: The (Data) version of the reports produce raw, unformatted data about actual, scheduled, and projected hours and wages by job. The data is intended for use with Microsoft Excel.

Located in:

All

Detail Genie

Scheduler

Timecard

Options

Schedule — select one of the following:

- **Current** – Show all shifts. Use to post a schedule, see who is scheduled, or check undercoverage or overcoverage.
- **Posted** – Show only schedules that are posted. If you post this report, employees can see open shifts and who is scheduled. You can use posted reports for tracking and audits. In Scheduler, select Mark Posted.

Note: If a posted schedule is edited, it becomes unposted. Because this option shows only schedules that are posted, the report does not show any edits that are made after the posting.

Report content

- **Location** — The top row is the name of the location. The second row is the complete path for the location. Each location starts a new page of the report.

- **Employee** — Open shifts for each job; followed by employees sorted by jobs, listed alphabetically

- For the Auto-Scheduler:

    - **Full-day Availability display option** — Flags employees with full-day availability

    - **Wages display option** — Displays wages only if you can have access to wage data

    - **Seniority option** — Sorts employees by department, job, then seniority from most seniority to least seniority

- **Job** — Sorted by sort order number, if configured. Otherwise, sorted alphabetically.

- **Shifts** — For each day of the time period:

    - Weekly report – Shifts listed by start time and end time

    - Monthly report – Shifts listed by shift label

    - Transfers – Italics followed by the letter x

    - Pay codes – Only for employees whose primary job is in the location. In monthly report, short names of pay codes.

    - In the Auto-Scheduler, the Breaks display option – Displays shift breaks

- **Print formats**

    - Weekly – 7 days on 8 1/2 x 11 inch (21.6 x 27.9 cm) page, landscape orientation

    - Monthly – 28 days on 8 1/2 x 14 inch (21.6 x 35.6 cm) page, landscape orientation

Location Schedule (Spreadsheet Export)

Location Schedule (Spreadsheet Export) shows the schedule for a single department or location. It displays all the people scheduled to work and their scheduled shifts in the selected location.

Located in:

All

Scheduler

Options

Pay Code Name — Full or Short Name

Shift Display — Shift Times or Labels

Display Scheduled Counts — Yes or No

Schedule — Current or Posted

Display Unassigned Employees — Yes or No

Report Content

- **Employee labor account** — The labor account for listed employees.
- **Employee** — Selected employes, one line each.
- **Job** — The employee's job.
- **Full-time Equivalency (FTE)** — The number the system uses in calculating accruals.
- **Seniority date**
- **Worked hours** — Scheduled hours
- **Worked weekend** — Yes or no
- **Date** — Hours of availability for each selected date

Location Schedule Detail (Spreadsheet Export)

Location Schedule Detail (Spreadsheet Export) shows the detail schedule for a single department or location. It displays all the people scheduled to work and their scheduled shifts in the selected location.

Located in:

All

Scheduler

Options

Display Scheduled Counts— Yes or No

Display Segments — Yes or No

Display Full Availability — Yes or No

Schedule — Current or Posted

Display Open Shifts— Yes or No

Display Unassigned Employees — Yes or No

Report Content

- **Employee labor account** — The labor account for listed employees.
- **Employee** — Selected employes, one line each.
- **Job** — The employee's job.
- **Full-time Equivalency (FTE)** — The number the system uses in calculating accruals.
- **Seniority date**
- **Worked hours** — Scheduled hours
- **Worked weekend** — Yes or no
- **Date** — Hours of availability for each selected date

Location Schedule Detail - Weekly

Location Schedule Detail - Weekly shows full-day employee schedules for the selected time period in the selected locations. Employees are sorted by organization, location, and job.

Located in:

All

Scheduler

Options

Employee Name — Select full name or short name

Schedule — Select current or posted

Employees — Select All Scheduled Employees, All Home Employees, All

Include — Select one or more on the following:

- Open shifts
- Wages
- Breaks
- Full-day availability
- Seniority

Report content

- **Report options** — Lists the selections made for the Include option
- **Organization/Location** — The employee's organization or location
- **Employee** — Listed by Scheduled Job
- **Total paid hours/wages of <job name>** — Listed for each worked day in the week
- **Total paid hours/wages** — Grand total of the employee Total paid hours/ wages

Location Schedule with Coverage

Location Schedule with Coverage combines information from the Location Schedule and Coverage reports.

This report shows all people who are scheduled to work at the location regardless of their primary job. It includes coverage data from the Workload Planner and Scheduler. Use the coverage data to avoid undercoverage or overcoverage. If locations do not have coverage data, the report shows no schedule at those locations.

You can also generate a **Location Schedule with Coverage - 6 Weeks** report.

Located in:

All

Scheduler

Options

Pay Codes — By default the report lists all pay codes. You can move pay codes from Selected to Available.

Schedule — Current shows all shifts. Posted shows only schedules that are posted. If you post this report, employees can see open shifts and who is scheduled. You can use posted reports for tracking and audits. In Scheduler, select Mark Posted. Note: If a posted schedule is edited, it becomes unposted. Because this option shows only schedules that are posted, the report does not show any edits that are made after the posting.

Report content

- This report groups information first by location, then by zone or shift set, then by primary job.
- **Groups**

- **Location** — Name in the center; the complete path for the location on the right. Each location starts a new page.

- **Zone** or **Shift Set** — Each zone or shift set starts a new page.

- **Job** — Groups are sorted by jobs, listed alphabetically

Columns

- **Employee** — Sorted by jobs, listed alphabetically by last and first name. Employees must have a matching primary job for a least one day or at least one shift that covers the primary job during the time period. Employees transferred from other locations have the letter x at the end of their name, job, and shift.

- **WSH**—Weekly Standard Hours are non-overtime hours that an employee works. Define in the **People Editor** > **Job Assignment** > **Timekeeper** > **Standard Hours**.

- **Job** — Employees are sorted alphabetically by job. If an employee has more than one schedule item (shifts or pay codes), each item has one row.

- **Days**—A shift, pay code, or no entry for each day in the selected time period.

  - **Shifts** — Shift label or start time.

    Shifts transferred from another location end with the letter x.

    Shifts for employees transferred to another location start with the letter x.

    If the employee works the start of the shift on that job, the label ends with a plus sign (+).

    If the employee works the end of the shift on that job, the label starts with a plus sign (+).

  - **Pay Codes**—Only for employees whose primary job is in the selected location

Rows below each group

- **Coverage** — Coverage totals of the shifts for the zone or shift set

- **Important:** This report always uses the Full Cover of Time Span coverage counting method regardless of the coverage counting settings for the location. At least one shift must cover the whole span. Otherwise, the count is 0 (zero).

- **Pay Codes** — Number of occurrences of each pay code for the primary job for the zone or shift set

Note: If the report has a group called Other, the location has no zone sets, or no shifts belong to a zone or shift set.

If the report is empty and the footer displays `No Data Returned`, the location has no data.

If a child location has no data, the report does not display that location.

- **Print formats**
    - 28 days on 8 1/2 x 14 inch (21.6 x 35.6 cm) page, landscape orientation

Location Schedule with Coverage (Spreadsheet Export)

Location Schedule with Coverage (Spreadsheet Export) shows the schedules and staffing coverage numbers for a location regardless of primary job.

Located in:

All

Scheduler

Options

Pay Code Name — Use Full Name or Short Name

Shift Display — Use Shift Times or Shift Labels

Display Open Shifts — Yes or No

Display Unassigned Employees — Yes or No

Display Scheduled Counts — Yes or No

Schedule — Select Current or Posted

Report Content

- **Employee labor account** — The labor account for listed employees.
- **Employee** — Selected employes, one line each.
- **Job** — The employee's job.
- **Full-time Equivalency (FTE)** — The number the system uses in calculating accruals.
- **Seniority date**
- **Worked hours** — Scheduled hours
- **Worked weekend** — Yes or no
- **Date** — Hours of availability for each selected date

On Call

On Call shows the on-call shifts for locations and dates. An *on-call* shift is a shift or segment with a work rule transfer that includes a call-in work rule. The shift or segment can have a job transfer.

Use this report to see patterns of on-call shifts. If you post this report, on-call employees can review their schedules.

Located in:

All

Detail Genie

Scheduler

Options

None

Report content

- This report groups on-call information by combined date and location.
- **Date** — In the column headers; each date has a separate row for each location
- **Location** — The complete path for the organizational location is in the header of each group.
  - If an on-call shift segment contains a job transfer to a different location (not to the employee's primary job) – shows location of transfer job
  - If an on-call shift segment but no job transfer – shows location of primary job
- **Job** — Grouped by the combination of date and location
- **Schedule** — Start and end times
  - **On-call shifts** – shows start and end times of the shift

- **On-call shift segments** – shows start and end times of the segment with the work rule transfer

- **Employee** — Last name first

- **Comment** — Written comments by supervisors

- **Print formats**
  - 8 1/2 x 11 inch (21.6 x 27.9 cm) page, portrait orientation.

Open Shifts

Open Shifts shows the open shifts to fill for each job, in selected locations.

Use this report to see gaps in the schedule. If you post this report early in the scheduling process or after you create most of the schedule, employees can sign up to work the open shifts.

You can also generate **Open Shifts - Monthly** and **Open Shifts - Weekly** reports.

Located in:

All

Scheduler

Timecard

Options

None

Report content

- **Location** — Name on the top row; the complete path for the location on the second row. Each location starts a new page.

- **Span** — Shows schedule zones if configured. Otherwise, shows the shifts from the workload shift sets.

  – If both workload shift sets and schedule zone sets are configured for a location, shows schedule zones.

  – You must configure workload shift sets for the location.

- **Job** — Lists only jobs that have open shifts. Sorted by order number, if configured. Otherwise, sorted alphabetically.

- **Shifts** — All open shifts by day

  – Weekly report – Open shifts sorted by start and end times

- Monthly (28 days) report – Open shifts sorted by shift label
- **Print formats**
  - **Weekly** – 7 days on 8 1/2 x 11 inch (21.6 x 27.9 cm) page, landscape orientation
  - **Monthly** – 28 days on 8 1/2 x 14 inch (21.6 x 35.6 cm) page, landscape orientation

Planned and Scheduled Counts (Spreadsheet Export)

Planned and Scheduled Counts shows Planned Baseline, Planned Adjusted and Schedule counts for a selected location and period of time.

Located in:

All

Scheduler

Options

None

Report content

- Job
- Start and End dates
- Zone
- Standard Shift
- Planned Baseline Head Count
- Planned Adjusted Head Count
- Scheduled Head Count
- Planned Baseline Duration (hrs)
- Planned Baseline Duration (min)
- Planned Adjusted Duration (hrs)
- Planned Adjusted Duration (min)
- Scheduled Duration (hrs)
- Scheduled Duration (min)

QuickFill Details

QuickFill Details lists details and status information for every open shift request that was sent during a time frame that you specify, and for the locations you select.

Located in:

All

Scheduler

Options

None

Report content

The report includes the following information about each open shift request:

- Open shift start and end times
- Location associated with the shift
- Status of the shift request (in progress, completed, cancelled)
- Who sent the request and when it was sent
- To whom the request was sent
- Date and time of responses that were received
- Comment associated with the request
- Outcome of the request
- Order and method by which the shifts were filled

Schedule by Labor Account

Schedule by Labor Account shows schedules for the selected labor accounts. Employees are sorted by labor account. Shifts have shift labels.

Use this report:

- To track schedules. If you post this report before the schedule period, employees can see their schedules and sign up for shifts.

- To function as an Employee Schedule report for organizations that do not use organizational jobs.

- To derive primary labor accounts from the primary jobs of employees.

- Answers the manager's question, "Where are my employees working?"

- Answers the employee's question, "Where and when am I working?"

You can run the following variations of the report:

- **Schedule by Labor Account - Monthly** — Displays 28 days/page and uses 8.5x11 paper.

- **Schedule by Labor Account - Monthly (Data)** — Produces raw, unformatted data intended for use with Microsoft Excel.

- **Schedule by Labor Account - Monthly (Excel)** — Format is optimized for Excel export.

- **Schedule by Labor Account - Weekly** — Displays 7 days per page and uses 8.5x11 paper.

- **Schedule by Labor Account - Weekly (Data)** — Produces raw, unformatted data intended for use with Microsoft Excel. It displays 7 days/page and uses 8.5x11 paper.

- **Schedule by Labor Account - Weekly (Excel)** — Displays 7 days per page. Format is optimized for Excel export.

Located in:

> All
>
> Scheduler
>
> Timecard

Options

> None

Report content

- **Employee** — Sorted by labor account, listed alphabetically; includes employees who have no scheduled shifts during the time period
- **Shifts**
  - Weekly report – Shifts by start and end time; includes hours and money amounts of pay codes
  - Monthly report – Shifts by shift label; includes first letter of pay code name
  - Off shift segments in italics followed by the letter o
  - Unavailable shift segments in italics followed by the letter u
  - Transfers in italics followed by the letter x
- **Print formats**
  - **Weekly** – 7 days on 8 1/2 x 11 inch (21.6 x 27.9 cm) page, landscape orientation
  - **Monthly** – 28 days on 8 1/2 x 14 inch (21.6 x 35.6 cm) page, landscape orientation

Schedule Details (Spreadsheet Export)

Schedule Details (Spreadsheet Export) shows schedule details by employee for a selected location and period of time.

Located in:

All

Scheduler

Options

Display Open Shifts — Select Yes or No.

Schedule — Select Current or Posted.

Report content

- Shift Employee Name
- Shift Employee Id
- Shift Is Assigned
- Shift Date
- Shift Id
- Shift Label
- Shift Period
- Shift Name
- Shift Name with Transfer
- Is Shift Template, Is Group Shift
- Shift Start, Shift End
- Shift Duration Seconds, Shift Duration Minutes, Shift Duration Hours
- Shift Creation Date and Time

- Shift Is Locked, Shift Is Posted
- Segment Id, Segment Detail Home, Segment Start, Segment End, Segment Org Job, Segment Transfer Labor Account, Segment Transfer Work Rule, Segment Type Name, Segment XFer In, Segment XFer Out, Segment Transfer Org Job
- Skill Certification Profile Id, SCP Name, SCP Description, SCP Skill Profile Id
- Skill Id, Skill Name, Skill Abbreviation, Skill Is Active
- Skill Proficiency Level Id, Skill Proficiency Level Name, Skill Proficiency Level Description, Skill Proficiency Level Is Active, Skill Proficiency Level
- SCP Cert Profile Id
- Cert Id, Cert Name, Cert Abbreviation, Cert Is Active, Cert Proficiency Level Id, Cert Proficiency Level Name, Cert Proficiency Level Description, Cert Proficiency Level Is Active, Cert Proficiency Level
- Comment Note Id, Comment Id, Comment Name, Comment Is Active, Comment Categories, Comment Number
- Note Text, Note Time Stamp
- Mapped Scheduled Zone Name, Mapped Scheduled Zone Description, Mapped Scheduled Zone Start, Mapped Scheduled Zone End, Mapped Scheduled Shift Name, Mapped Scheduled Shift Description, Mapped Scheduled Shift Start, Mapped Scheduled Shift End

Schedule Rule Violations (Spreadsheet Export)

She du le Rules Violations (Spreadsheet Export) shows schedule rule violations by employee for a selected location and period of time.

Located in:

All

Scheduler

Options

None

Report content

- **Date** — Date the violation occurred.
- **Employee** — Employee who committed the violation.
- **Org Node** — Employee/labor account Org Node.
- **Rule Name Id** — Rule database name.
- **Rule Description** — Description of the rule in Setup.
- **Severity Id** — Number associated with severity.
- **Severity** — Severity level of the rule violation.
- **Rule Violation Description** — Brief des rip ti on of the violation.

School Calendar Audit Trail

School Calendar Audit Trail provides an audit trail of any school calendars that were changed and the user who made the change in the user-selected time period.

Located in:

All

Detail Genie

Scheduler

Options

None

Single Zone

Single Zone shows multiple departments for a single schedule zone, and shows actual staffing levels as compared to planned, scheduled, target and budgeted staffing levels for that department.

You can choose a report that prints in **landscape** or **portrait** format.

Use this report to staff multiple units within volume and budgetary guidelines.

Notes: This report supports *only* zone sets. If shift sets are included, data can be inaccurate. For example, if the report includes data for employees who work a shift that is in two or more zones or days, the entire shift is included on the day when the shift starts.

If the location has workloads that are based only on shift sets or are based on labor volumes, the report is blank.

To keep non-productive time (for example, vacation) from the report, enter it as the appropriate pay code in Scheduler and timecard.

When you configure schedule zone sets, use names that are easy to associate with the correct location. For information about schedule zone sets, refer to the *Scheduler System Administrator Guide*.

Located in:

All

Scheduler

Timecard

Options

Schedule Zone — Select the schedule zone of the data to be shown in the report.

Report content

The report displays the time period on the top line, then lists the locations and zone, then the following:

- **Location** — The complete path for the location on the top row. Each report lists multiples locations.

- **Job groups** — Job groups cluster jobs at this location into categories; for example manager, registered nurse. Each job group has the following parameters:

  – **Planned (Pln)** – Workload requirement that covers this location and zone

  – **Scheduled (Sch)** The actual number of staff who are scheduled for this location and zone. This parameter is calculated as the total hours scheduled for all employees divided by the time period of the zone.

  – **Variance (Var)** – Difference between the workload requirement and the actual number of staff who are scheduled. A negative number indicates undercoverage. A positive number indicates overcoverage.

- **Totals (TOT)** — Total planned and scheduled staff and the variance. A negative number indicates undercoverage. A positive number indicates overcoverage.

- **Volume (VOL)** — Actual or weighted volume (from Workload Planner > Calendar tab). For health care, volume is the patient census.

- **Budgeted (BUD)** — Total baseline workload hours (from Workload Planner > Calendar tab) for the time period divided by budgeted or weighted budgeted volume (from Workload Planner > Volume tab).

- **Projected (PRO)** — Total adjusted workload hours (from Workload Planner > Calendar tab) for the time span divided by projected or weighted projected volume (from Workload Planner > Volume tab).

- **Actual (ACT)** — Total actual productive hours (from the paid hours on timecards) for the time span divided by actual or weighted actual volume (from Workload Planner > Volume tab).

Tip: If an employee's schedule overlaps two locations, that employee is paid only for the actual hours worked.

Do not schedule employees for overlapping hours. Otherwise, this report can have different actual and scheduled hours.

- **Scheduled employees** — Employees who are scheduled to work on this day, zone, and location. Sorted by job, listed alphabetically by name with scheduled job and shift.

  - Shifts shown by shift label or shift start time

  - Job transfers indicated with an x

  - Employee names truncated at 20 characters

  - Job name and shift label or start time

- **Print formats**

  Departments sorted alphabetically in up to three columns on a page. No limitation on the range of dates.

  - **Landscape** – 1 day on 8 1/2 x 11 inch (21.6 x 27.9 cm) page, landscape orientation.

  - **Portrait** – 1 day on 8 1/2 x 11 inch (21.6 x 27.9 cm) page, portrait orientation.

Staffing By Zone

The by Zone report displays the scheduled employees by zone for one or more locations or dates. The report provides a space for writing comments or patient assignments. The end of the report lists the employees with time pay codes.

Located in:

All

Detail Genie

Scheduler

Timecard

Options

None

Staffing Efficiency

Staffing Efficiency displays the census and compares the staff's actual hours to planned hours to generate efficiency percentages.

Use this report for JCAHO reporting to measure how effectively the staffing plan was executed.

Located in:

All

Scheduler

Options

None

Staffing Sheet

Staffing Sheet shows data from the Workload Planner. It displays the employees who are scheduled for each job, the planned number of employees, and the variance for each job.

Use this report for the following:

– To see who is working during a time period at a location

– For a quick view of overcoverage and undercoverage

– Answers the manager's questions:

"Is my schedule meeting the planned need?"

"Do I have the correct number of workers scheduled?"

Notes: The selected location must have an associated workload.

This report can display coverage that is based on different types of workload. However, it does not display more than one type for a single organizational job. For example, a job has a workload that is based on a mix of labor volumes, shift sets, or zone sets. The report displays only the workload that is based on, in order, labor volume, shift set, or zone set for that organizational job.

The Sheet-Daily and Sheet-Weekly reports ignore labor volume. You cannot generate these reports if a location only has workloads that are based on labor volumes.

You can generate the following Staffing Sheet reports

• **Staffing Sheet-Daily**

• **Staffing Sheet Detail-Daily**

• **Staffing Sheet-Weekly**

Located in:

Scheduler

Timecard

Options

In the Staffing Sheet-Daily and Staffing Sheet weekly, **Show Zero In Rows —** Select either:

*   **Yes** – All rows are displayed.
*   **No** – Report does not display a row if all cells during the Time Period equal zero.

    Note: If any day during the Time Period has shifts or workload, the report displays the row with zeros as placeholders in the cells that have no data.

Only for the Sheet Detail-Daily report, select the following **Coverage Details**:

*   Employee Name, **Full** or **Short**.
*   Start Time of the data for each day in the report.
*   The number of hours to report.

Report content

- **Location** — Name on the top row; the complete path for the location on the second row. Each location starts a new page.

- **Span** — Shows schedule zones if configured. Otherwise, shows the shifts from the workload shift sets.

- **Job** — Grouped by span. Then if configured, sorted by order number. Otherwise, sorted alphabetically.

- **Planned / Variance** — Indicates undercoverage or overcoverage for a span, based on the workload plan.

    - **Planned** – Workload requirement from the plan

    - **Variance** – Difference between the workload requirement and the actual number of staff who are scheduled. A negative number indicates undercoverage. A positive number indicates overcoverage.

- **Shifts** (Weekly Sheet only) — All assigned shifts by start and end time under the employee's name

    - Open shifts if workload shifts sets are configured

    - Transfers in italics followed by the letter x

- **Start Time - End Time** (Daily Sheet only) — Scheduled start and end time of each shift

    - Open shifts if workload shifts sets are configured

    - Transfers in italics followed by the letter x

- **Notes** (Daily Sheet only) — Notations made to a posted schedule. Use to document tasks and responsibilities, or why a variance exists.

- **Print formats**

    - **Daily** – 1 day on 8 1/2 x 11 inch (21.6 x 27.9 cm) page, landscape orientation

    - **Weekly** – 7 days on 8 1/2 x 11 inch (21.6 x 27.9 cm) page, landscape orientation

Chapter 3

Activities reports

If Activities is part of the Workforce Central suite, you can run reports based on Activities data.

Notes:

The descriptions of reports in this chapter contain only Options. Report content is not included.

In the system, all Activities reports are listed in both the All and Activities sections

Click a report for details.

Activity Detail reports

Barcode Reports

- • "Yield Detail by Group" on page 312
- • "Yield Summary" on page 313
- • "Yield Summary by Group" on page 314

Other Reports

- • "Orphaned Activity Events" on page 300
- • "Weekly Activity" on page 303

Activity Audit

Activity Audit lists modifications made to the activity events table in the Activity Events tab of the timecard.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Activities Cell — Select cells from list of available cells (default is no cells selected).

Page Break on Employee — Indicate if a page break should occur after each employee (default is no page breaks).

Activity Detail

Activity Detail shows, by activity, allocated hours, earned hours, efficiency, and standard cost of activity.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Activity — Indicate if a page break should occur after each activity (default is no page breaks).

Show Activity Dates — Select activity dates based on actual completion, actual start, revised completion, revised start, scheduled completion, or scheduled start (default is none).

Show Activity Statuses — Select from completion or held activity statuses (default is both).

Activities Cell — Select cells from list of available cells (default is no cells selected).

Activity Detail by Group

Activity Detail by Group shows activity events, total allocated hours, earned hours, efficiency, and quantities for each employee or team.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Group by Employee or Cell or Activity — Indication how to organize the report: by employee, cell, or activity. The default is by employee.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Group — Indicate if a page break should occur after each group (default is no page breaks).

Worked Accounts — Select to run the report by a worked account. The default is no worked accounts.

Activities Cell — Select cells from list of available cells (default is no cells selected).

Activity Pay Code Hours

Activity Pay Code Hours shows, by activity event, the allocated hours charged to pay codes.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Activity — Indicate if a page break should occur after each activity (default is no page breaks).

Activities Cell — Select cells from list of available cells (default is no cells selected).

Activity Pay Code Hours by Group

Activity Pay Code Hours by Group shows, by employee, the allocated hours charged to pay codes.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Group by Employee or Cell or Activity — Indication how to organize the report: by employee, cell, or activity. The default is by employee.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Group — Indicate if a page break should occur after each group (default is no page breaks).

Activities Cell — Select cells from list of available cells (default is no cells selected).

Activity Summary

Activity Summary shows total allocated hours, earned hours, and efficiency for each activity hierarchy of levels.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Activity — Indicate if a page break should occur after each activity (default is no page breaks).

Activity Summary by Group

Activity Summary by Group shows, by employee, total allocated hours, earned hours, efficiency, and standard cost of each activity.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Group by Employee or Cell or Activity — Indication how to organize the report: by employee, cell, or activity. The default is by employee.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Group — Indicate if a page break should occur after each group (default is no page breaks).

Activities Cell — Select cells from list of available cells (default is no cells selected).

Activity Transactions by Date

Activity Transactions by Date lists transactions (submitted activity forms) and errors.

Options

Activity Device Name — Enter a starting name and an ending name for the activity device.

Activity Transaction Status Type — Select completed, error, initial, or invalid (default is all).

Additional Transaction Information — Show additional transaction information (default is none).

Date Type — Show date type as effective date (default) or created date.

Form Code — Run the report with one or more form codes (default is none).

Form Type — Run the report with one or more form types (default is none).

Page Break on Date — Indicate if a page break should occur after each date (default is no page breaks).

Activity Transactions by Employee

Activity Transactions by Employee lists transactions (submitted forms) and errors.

Options

Activity Device Name — Enter a starting name and an ending name for the activity device.

Activity Transaction Status Type — Select completed, error, initial, or invalid (default is all).

Additional Transaction Information — Show additional transaction information (default is none).

Date Type — Show date type as effective date (default) or created date.

Form Code — Run the report with one or more form codes (default is none).

Form Type — Run the report with one or more form types (default is none).

Page Break on Employee — Indicate if a page break should occur after each employee (default is no page breaks).

Barcode for Activity Traveler

Barcode for Activity Traveler prints activity names in Code39 format, and name and description of the activity.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Page Break on Activity — Indicate if a page break should occur after each activity (default is no page breaks).

Barcode for Forms

Barcode for Forms prints form codes in Code39 format, and form code and description of the form.

Options

Form Code — Run the report with one or more form codes (default is none).

Barcode for Labor Levels

Barcode for Labor Levels prints labor levels in Code39 format, and other information about labor levels.

Options

None

Barcode for Result Codes

Barcode for Result Codes prints result codes for each field definition in Code39, and name and description of the result code.

Options

None

Employee Activity Summary with Graph

Employee Activity Summary with Graph shows total allocated hours, earned hours, and efficiency for each activity hierarchy of levels.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Week start — Select the starting day of the week.

List of Activities

List of Activities shows the activities configured in the system.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Page Break on Activity — Indicate if a page break should occur after each activity (default is no page breaks).

List of Activity Profiles

List of Activity Profiles shows the activity profile settings configured in the system.

Options

None

List of Cells

List of Cells shows the settings for cells that are configured in the system.

Options

Page Break on Cell — Indicates whether a page break should occur after each cell (default is no page breaks).

Activities Cell — Select cells from list of available cells (default is no cells selected).

List of Configurations

List of Configurations shows the activity configuration settings in the system.

Options

None

List of Field Definitions

List of Field Definitions shows the field definition settings configured in the system.

Options

None

List of Form Profiles (DAP)

List of Form Profiles (DAP) lists settings in the form profiles configured in the system.

Options

None

List of Forms

Lists of Forms shows the details of the forms configured in the system.

Options

- **Form Code** — Run the report with one or more form codes (default is none).
- **Form Type** — Run the report with one or more form types (default is none).

List of Result Code Profiles (DAP)

List of Result Code Profiles (DAP) lists result code profile (DAP) settings in the system.

Options

None

List of Result Codes

List of Result Codes lists result code settings for each field.

Options

None

List of Units of Measure

List of Units of Measure shows the units of measure configured in the system.

Options

None

Orphaned Activity Events

Orphaned Activity Events lists the reported activity events that lack corresponding time and attendance data.

Options

None

Resource Detail by Group

Resource Detail by Group shows efficiency percentage, quality, utilization, and effectiveness for each cell, resource, or activity.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Group by Resource or Cell or Activity — Indicate how to organize the report: by resource, cell, or activity. The default is by resource.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Group — Indicate if a page break should occur after each group (default is no page breaks).

Show Quality Metrics — Select how to report quality metrics. (All are selected by default.)

Utilization — *Direct Time* / (*Indirect Time + Direct Time*)

Quality — (*Completed + Reworked*) / (*Completed + Reworked + Scrapped*)

Efficiency — (*Earned Hours*) * 100

Effectiveness — *Quality * Efficiency * Utilization*

Worked Accounts — Select to run the report by a worked account. The default is no worked accounts.

Activities Cell — Select cells from list of available cells (default is no cells selected).

Activities Resource — Select the resource's starting name and ending name.

Resource Summary by Group

Resource Summary by Group lists efficiency percentage, quality, utilization, and effectiveness for each cell, resource, or activity. The report shows spans that start or end within the selected time frame.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Group by Resource or Cell or Activity — Indicate how to organize the report: by resource, cell, or activity. The default is by resource.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Group — Indicate if a page break should occur after each group (default is no page breaks).

Show Quality Metrics — Select how to report quality metrics. (All are selected by default.)

Utilization — *Direct Time* / (*Indirect Time* + *Direct Time*)

Quality — (*Completed* + *Reworked*) / (*Completed* + *Reworked* + *Scrapped*)

Efficiency — (*Earned Hours* / *Hours*) * 100

Effectiveness — *Quality* * *Efficiency* * *Utilization*

Activities Cell — Select cells from list of available cells (default is no cells selected).

Activities Resource — Select the resource's starting name and ending name.

Weekly Activity

Weekly Activity shows, by employee, activity punches with variances and allocated hours for each activity event.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Employee — Indicate if a page break should occur after each employee (default is no page breaks).

Activities Cell — Select cells from list of available cells (default is no cells selected).

Work in Process Activity Status

Work in Process Activity Status shows status information and scheduled and actual dates for each activity.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity User Name — Enter a starting and ending name for the activity user name.

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Group by Activity or User — Indicate how to organize the report: by activity or user. The default is by activity.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Group — Indicate if a page break should occur after each group (default is no page breaks).

Show Activity Dates — Select activity dates based on actual completion, actual start, revised completion, revised start, scheduled completion, or scheduled start (default is none).

Show Activity Statuses — Select from completion or held activity statuses (default is both).

Activities Cell — Select cells from list of available cells (default is no cells selected).

Work in Process Cost Detail

Work in Process Cost Detail shows, by employee, the scheduled, revised, and actual dates for each activity, along with efficiency, cost, and earned dollars.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Activity — Indicate if a page break should occur after each activity (default is no page breaks).

Show Activity Dates — Select activity dates based on actual completion, actual start, revised completion, revised start, scheduled completion, or scheduled start (default is none).

Show Activity Statuses — Select from completion or held activity statuses (default is both).

Activities Cell — Select cells from list of available cells (default is no cells selected).

Work in Process Cost Detail by Group

Work in Process Cost Detail by Group lists efficiency, cost, and earned dollars for each employee organized by activity event for each employee or cell member. Each activity includes scheduled, revised, and actual date information. You can also view the quantity received and quantity required information for each employee or cell.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Group by Employee or Cell or Activity — Indication how to organize the report: by employee, cell, or activity. The default is by employee.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Group — Indicate if a page break should occur after each group (default is no page breaks).

Activities Cell — Select cells from list of available cells (default is no cells selected).

Work in Process Cost Summary

Work in Process Cost Summary shows the scheduled, revised, and actual dates for each activity, along with efficiency, cost, and earned dollars.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity User Name — Enter a starting and ending name for the activity user name.

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Group by Activity or User — Indicate how to organize the report: by activity or user. The default is by activity.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Group — Indicate if a page break should occur after each group (default is no page breaks).

Show Activity Dates — Select activity dates based on actual completion, actual start, revised completion, revised start, scheduled completion, or scheduled start (default is none).

Show Activity Statuses — Select from completion or held activity statuses (default is both).

Activities Cell — Select cells from list of available cells (default is no cells selected).

Work in Process Cost Summary by Group

Work in Process Cost Summary by Group shows dates, efficiency, cost, and earned dollars for each employee or cell.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Group by Employee or Cell or Activity — Indication how to organize the report: by employee, cell, or activity. The default is by employee.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Group — Indicate if a page break should occur after each group (default is no page breaks).

Activities Cell — Select cells from list of available cells (default is no cells selected).

Work in Process Time to Complete

Work in Process Time to Complete shows status, earned hours and efficiency for each activity and includes an estimate of remaining hours to complete the activity.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity User Name — Enter a starting and ending name for the activity user name.

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Group by Activity or User — Indicate how to organize the report: by activity or user. The default is by activity.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Group — Indicate if a page break should occur after each group (default is no page breaks).

Show Activity Statuses — Select from completion or held activity statuses (default is both).

Show Quantities Received — Show activity quantities received (default is none).

Show Quantities Required — Show activity quantities required (default is none).

Activities Cell — Select cells from list of available cells (default is no cells selected).

Work in Process Time to Complete Summary

Work in Process Time to Complete Summary shows allocated hours, earned hours, and efficiency for each activity hierarchy of levels. The report includes an estimate of remaining hours to complete activities in the hierarchy.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity User Name — Enter a starting and ending name for the activity user name.

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Group by Activity or User — Indicate how to organize the report: by activity or user. The default is by activity.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Group — Indicate if a page break should occur after each group (default is no page breaks).

Show Activity Statuses — Select from completion or held activity statuses (default is both).

Activities Cell — Select cells from list of available cells (default is no cells selected).

Yield Detail

Yield Detail shows yield percentage of work completed on each activity organized by employee.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Activity — Indicate if a page break should occur after each activity (default is no page breaks).

Show Activity Dates — Select activity dates based on actual completion, actual start, revised completion, revised start, scheduled completion, or scheduled start (default is none).

Show Activity Statuses — Select from completion or held activity statuses (default is both).

Activities Cell — Select cells from list of available cells (default is no cells selected).

Yield Detail by Group

Yield Detail by Group shows yield percentage of work completed on each activity organized by activity event for each employee or cell member.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Group by Employee or Cell or Activity — Indication how to organize the report: by employee, cell, or activity. The default is by employee.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Group — Indicate if a page break should occur after each group (default is no page breaks).

Activities Cell — Select cells from list of available cells (default is no cells selected).

Yield Summary

Yield Summary shows yield percentage of work completed on each activity.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Activity — Indicate if a page break should occur after each activity (default is no page breaks).

Yield Summary by Group

Yield Summary by Group shows yield percentage of work completed by each employee or cell member.

Options

Activity Complete Status — Select canceled, complete, incomplete, or not started (default is all).

Activity Date — Select a date type and starting and ending dates (default is all).

Activity Held Status — Select never held or released, on hold, or released (default is all).

Activity Name — Enter the activity's starting name and ending name.

Group by Employee or Cell or Activity — Indication how to organize the report: by employee, cell, or activity. The default is by employee.

Include Indirect Activities — Indicate if the report should include indirect activities (default is no indirect activities).

Page Break on Group — Indicate if a page break should occur after each group (default is no page breaks).

Activities Cell — Select cells from list of available cells (default is no cells selected).

Chapter 4

Attendance reports

If Attendance is part of the Workforce Central suite, you can run reports based on Attendance data.

Note: In the system, reports might be listed in one or more different categories; for a list of these locations see the appropriate report's page.

Click a report for details.

- "Employee Discipline Levels" on page 341
- "Perfect Attendance" on page 343

Attendance Actions Configuration

Attendance Actions Configuration lists all the configured attendance actions sorted by Action Type.

Located in:

All

Configuration

Options

None

Report content

- The top-level heading lists the action type.
- **Attendance Actions Name or Manual Adjustment Name** — The name of the attendance action or manual adjustment.
- **Description** — The description for the attendance action. Manual Adjustments do not display a description.
- **Display Name** — The name for the attendance action or the manual adjustment that is used throughout the Attendance Setup application.
- **Code** — The abbreviation for the attendance action or the manual adjustment.
- **Action Effective Date** — Indicates the date when the action is effective. The possible values are Action Triggered Date and Action Complete Date. Manual Adjustments do not display an action effective date.
- **Active** — Indicates if the attendance action has a status of Active. Manual Adjustments do not display a status of Active.
- The bottom-level information lists the total number of attendance actions.

Attendance Action Detail

Attendance Action Detail lists the attendance actions for each employee for the specified time period. This report displays actions that had at least one date (triggered, initiated, and completed) falling into the range of dates in the selected time period.

Located in:

All

Attendance

Configuration

Options

None

Report Content

- The top-level heading for each employee included in the report contains the employees' name and ID and the date the employee's information was last processed through.

- **Action —** The name of the attendance action.

- **Triggered Date** — The date that the attendance action was triggered.

- **Initiated Date** — The date that the attendance action was initiated.

- **Current Status** — The current status of the attendance action, such as Completed or Initiated.

- **Completed Date** — The date that the attendance action was completed.

- **Details** — Any comments that are associated with the attendance action.

- **Source Policy** — The name of the attendance policy whose rules caused the change in discipline levels for the employee.

- The bottom-level information contains the total number of employees in the report.

Attendance Analysis

Attendance Analysis displays summary information for the selected people. A list of attendance events and patterns is displayed with the number of occurrences, total number of hours, and the wage liability associated with each event or pattern. The number of occurrences is also displayed in chart form. There is a list of employees with the number of occurrences, total number of hours, and the wage liability associated with each employee.

To view more details, you can click the employee. For each employee, there is the same summary chart and list. There is also a list of balance types. For each balance type, the starting balance, balance change, and ending balance are displayed. There is perfect attendance summary information.

Located in:

All

Attendance

Options

Events — You can choose which attendance events to include in the report.

Lost time events — You can choose which lost time events to include in the report.

Combined events — You can choose which combined events to include in the report.

Patterns — You can choose which attendance patterns to include in the report.

Report Content

- The number of occurrences of attendance events and patterns displays in chart form.

- A list of attendance events and patterns is displayed along with the number of occurrences, total number of hours, and the wage liability associated with each event or pattern.

- A list of employees with the number of occurrences, total number of hours, and the wage liability associated with each employee.

- To view more details, you can click the employee. For each employee:

  - The number of occurrences of attendance events and patterns is displayed in chart form.

  - A list of attendance events and patterns is displayed along with the number of occurrences, total number of hours, and the wage liability associated with each event or pattern.

  - A list of balance types. For each balance type, the starting balance, balance change, and ending balance are displayed

  - Perfect attendance summary information.

Attendance Balances

Attendance Balances lists the point balances for each employee within the specified time frame.

Note: Use the Attendance Balance (Excel) report is you plan to export results to Excel.

Located in:

All

Attendance

Options

Calculated Balances — You can choose which calculated balances to include in the report.

Points and Occurrences — You can choose which points and occurrences to include in the report.

Time Balances — You can choose which time balances to include in the report.

Report Content

- The top-level heading for each employee included in the report contains the employee's name and ID and the date when the employee's information was last processed.

- **Balance Category** — The name of the balance category. The possible values are Calculated Balances, Points & Occurrences, and Time.

- **Balance Type** — The name of the balance type. Lists only balance types that are associated with an employee through the Attendance Policies for the selected time period. The balance types are grouped by balance category.

- **Starting Balance** — The balance total before any change amounts are added to or subtracted from an employee's totals.

- **Change** — The amount of points to be added to or subtracted from an employee's totals.

- **Ending Balance** — The balance total after any change amounts are added to or subtracted from an employee's totals.

- The bottom-level information contains the total number of employees in the report.

Attendance Calendar

Attendance Calendar shows a calendar view for each employee included in the report. This calendar view lists all attendance events, patterns, combined events, and actions on the appropriate day within the calendar. A day can only contain six events. Calculated balances and scheduled time events display in the calendar report.

The calendar report displays the following attendance items:

- Amnesty marker
- Ignore timecard marker
- Expirations
- Perfect attendance awards
- Perfect attendance negations
- Holidays
- Attendance events
- Lost time events
- Combined events
- Extending tracking period combined events
- Attendance patterns
- Balance adjustments
- Formula results
- Actions
- Balance resets

Located in:

All

Attendance

Options

None

Report Content

- The top-level heading for each employee included in the report contains the employee's name and ID.

- Saturdays and Sundays have a light gray background.

- Each attendance event, attendance pattern, combined event, or attendance action is identified in the report as:

  - **Code** — The abbreviation for the attendance event, pattern, combined event, or action.

    Multiple transactions for the same event contain a reason code. The reason code legend appears at the bottom of the report.

  - **Actual amount** — The actual amount of the attendance event or combined event.

  - **Point value** — The amount of the attendance event, attendance pattern, or combined event that is to be added or subtracted from an employee's totals.

Attendance Combined Events

Attendance Combined Events lists all configured combined events.

Located:

All

Configuration

Options

None

Report content

- **Combined Event Name** — The name of the combined event.
- **Display Name** — The name of the combined event that is used throughout the Attendance Setup application.
- **Code** — The abbreviation of the combined event.
- **Events** — The attendance or lost time events that are contained within the combined event.
- **Active** — Indicates if the combined event has a status of Active.
- The bottom-level information lists the total number of combined events.

Attendance Events Configuration

Attendance Events Configuration lists all configured attendance events alphabetically, within each attendance event category.

Located in:

All

Configuration

Options

None

Report content

- The top-level heading lists the event category. For example, exceptions is an event category. Custom event categories also appear in the list.

- **Attendance Event Name** — The name of the attendance event.

- **Display Name** — The name of the attendance event that is used throughout the Attendance Setup application.

- **Code** — The abbreviation of the attendance event.

- **Timekeeping Exception or Punch Type** — The type of attendance event.

- **Pay Code** — Displays the pay code that relates to the attendance event, if any. Possible pay codes are ones that excuses the absences, hourly pay codes that do not excuse absences, or combined pay codes.

   An *(1) indicates a pay code is the Start of Work pay code for partial day recognition in patterns.

- **Track** — The way to track the pay code edits that relates to the attendance event. The possible values are Occurrence of Pay Code, Amount of Pay Code Edit, Daily Pay Code Total, or Shift Pay Code Total.

- **Comment** — The punch or pay code comment related to the attendance event.

- **Exception or Pay Code Range** — The range of time related to the attendance event.

- **Active** — Indicates if the attendance event has a status of Active.

- The bottom-level information lists the total number of attendance events.

Attendance Incident Detail

Attendance Incident Detail displays each employee's attendance events, patterns, combined events, perfect attendance, and actions in a list format for a specified time period. The earliest attendance events, patterns, combined events, perfect attendance items, and actions appear at the top of the report.

Within a day, the attendance events, patterns, combined events, perfect attendance items, and actions appear in the order that they were triggered.

The time an attendance event occurs is important. For example, a tardy event precedes an early out, if they occur on the same day. Events precede actions, and actions precede manual adjustments and amnesty markers.

Located in:

All

Attendance

Options

Actions — You can choose which attendance actions to include in the report.

Adjustments and markers — You can choose which adjustments or markers to include in the report. The options are Balance adjustment, Balance reset, Ignore history marker, and Ignore timecard marker.

Combined events — You can choose which combined events to include in the report.

Events — You can choose which attendance events to include in the report.

Lost time events — You can choose which lost time events to include in the report.

Patterns — You can choose which attendance patterns to include in the report.

Transactions by policies — You can choose which transactions by attendance policies to include in the report.

Other Policy Transactions — You can choose which policy transactions to include in the report. The options are Formula Results, Perfect Attendance, Point Expirations, and Negating Points.

Report content

- The top-level heading for each employee included in the report contains the employees' name and ID, the attendance profile or profiles that are assigned to the employee, and the date when the employee's information was last processed.

- **Date** — The date that the attendance event, pattern, or action occurred on.

- **Event/Pattern/Action** — The Display name of the attendance event, pattern, combined event, or action. Manual adjustments appear in italicized text. Holidays are listed with no other data. Point expirations and perfect attendance negations show the name of the event and the date of the originating event. Leave events and rolling tracking period transactions are also displayed.

  Multiple transactions for the same event contain a reason code. The reason code legend appears at the bottom of the report.

- **Code** — The abbreviation for the attendance event, pattern, combined event, or action.

- **Actual Amount** — The actual amount of the attendance event or combined event.

- **Change** — The amount of the attendance event, attendance pattern, or combined event that is to be added or subtracted from an employee's totals.

- **Total** — The balance total after any change amounts are added to or subtracted from an employee's totals.

- **Balance Type** — The name of the balance type.

- **Shift Start Time** — The start time of the shift.

- **Source Policy** — The name of the attendance policy whose rules caused the change in discipline levels for the employee.

- **Perfect Attendance Disqualification** — Indicates if the attendance event, attendance pattern, combined event, or attendance action disqualifies the employee from attaining perfect attendance.

- **Source Perfect Attendance Definition** — Perfect attendance definitions assigned to the employee who is associated with the attendance transaction.

- The ending balance of each balance type that appears in the report for each employee, grouped by balance type.

Attendance Incident Tab

Attendance Incident Tab displays information about each employee's attendance events, attendance patterns, perfect attendance, and attendance actions in a list format (similar to the Attendance Editor Incidents tab) for the specified time period.

Located in:

All

Attendance

Options

Select one or more of the following options from the Available lists:

Combined events

Patterns

Actions

Other Policy Transactions, such as Perfect Attendance and Point Expirations.

Adjustments and Markers

Transactions by Policies

Events

Lost Time Events

Attendance Lost Time Events

Attendance Lost Time Events lists all the configured lost time events.

Located in:

All

Configuration

Options

None

Report content

- **Name** — The name of the lost time event.
- **Display Name —** The display name of the lost time event.
- **Code** — The code of the lost time event.
- **Track** — Displays Daily Lost Time or Shift Lost Time to show the lost time is tracked by day or by shift.
- **Units —** Displays Hours or Percent to indicate how the lost time is tracked.
- **Lost Time Range** — Displays either the time range or the percentage range of the lost time.
- **Contributing Event** — Displays any events that contribute to the lost time.
- **Worked Cannot Exceed Scheduled** — Indicates if employees worked time can exceed their scheduled time.
- **Active** — Indicates if the lost time event is active.
- The bottom-level information lists the total number of lost time events.

Attendance Patterns

Attendance Patterns lists all configured attendance patterns and their associated attendance events.

Located in:

All

Configuration

Options

None

Report content

- The top-level heading lists the pattern category of the attendance events. The possible values are Consolidated Events, Event repeating on consecutive days, Linked Days, Same Day Events, or Threshold Amount in Tracking period.
- **Pattern Name** — The name of the attendance pattern.
- **Display Name** — The name of the attendance pattern that is used for the attendance pattern throughout the Attendance Setup application.
- **Code —** The abbreviation of the attendance pattern name.
- **Attendance Event** — The attendance event that is associated with the attendance pattern.
- **Saturdays & Sundays do not interrupt Consecutive Days** — Indicates if only Monday through Friday are considered when determining if days are consecutive. Saturdays and Sundays interrupt a pattern and cause Monday to start a new pattern.
- **Active** — Indicates if the attendance pattern has a status of Active.
- The bottom-level information lists the total number of attendance patterns.

Attendance - Perfect Attendance Definitions

Attendance - Perfect Attendance Definitions lists all configured perfect attendance definitions and the attendance events, attendance patterns, or combined events that disqualify an employee from perfect attendance.

Located in:

All

Configuration

Options

None

Report content

- The top-level heading lists the perfect attendance definition name.
- **Display Name** — The name for the perfect attendance definition that is used throughout the Attendance Setup application.
- **Code** — The abbreviation for the perfect attendance definition.
- **Events/Patterns Disqualifying from Perfect Attendance** — The event, pattern, combined event, or lost time event that disqualifies an employee from perfect attendance if that employee incurs that event, pattern, combined event, or lost time event.
- **Number of Free Incidents** — The number of event, pattern, or combined events incidents that the employee can incur and not be disqualified from perfect attendance.
- **Active** — Indicates if the perfect attendance definition has a status of Active.
- The bottom-level information lists the total number of perfect attendance definitions.

Attendance Policies

Attendance Policies lists all configured attendance policies sorted by their assigned discipline levels. For each discipline level, attendance policies are sorted by types in the following order:

- Discipline policies
- Perfect attendance policies
- Total Balance policies
- Previous Actions policies
- Formula policies

Located in:

All

Configuration

Options

None

Report content

- The top-level heading lists the discipline level.
- **Discipline policies** — Lists the discipline policies, incident rules, incident number rules, rule groups, and time collection for each attendance event policy. Indicates if this policy negates expirations from discipline policies.
- **Perfect attendance policies** — Lists the perfect attendance data and definitions for each perfect attendance policy.
- **Total Balance policies** — Lists the discipline totals and the actions for each total points policy.
- **Previous Actions policies** — Lists the previous actions and the actions for each previous actions policy.

- **Formula policies** — Lists the formula data for each formula policy.

- **Active** — Indicates if the attendance policy has a status of Active.

- The bottom-level information lists the total number of attendance policies split into the different policy types.

Attendance Profiles

Attendance Profiles lists all the configured attendance profiles.

Located in:

All

Configuration

Options

None

Report content

- The top-level heading lists the attendance profile name and profile description.
- The second-level headings list the time periods.
- The third-level headings list the discipline levels.
- **Policy name** — The name of the attendance policies associated with the attendance profile.
- **Active** — Indicates if the attendance profile has a status of Active.
- The bottom-level information lists the total number of attendance profiles.

Attendance Tracking Periods

The Attendance Tracking Periods report lists all the configured attendance tracking periods.

The tracking period data is sorted alphabetically first on the tracking period type, then on the name.

Located in:

All

Configuration

Options

None

Report content

- **Tracking Period Type** — The type of the tracking period. The possible values are Rolling Periods and Fixed Periods.
- **Name** — The name of the tracking period.
- **Description** — The description of the tracking period.
- **Length** — The time frame of the tracking period. The possible values are Calendar day or days, Calendar week or weeks, Calendar month or months, Calendar quarter or quarters, Scheduled day or days, Pay period.
- **Active** — Indicates if the attendance tracking period has a status of Active.
- The bottom-level information lists the total number of attendance tracking periods.

Employee Attendance Profiles

Employee Attendance Profiles lists the attendance profile information that is detailed in the Job Assignment tab of the People Editor for each employee who is included in the report.

Located in:

All

Attendance

Options

None

Report Content

- The top-level heading for each employee included in the report contains the employee's name and the employee's ID number.

- **Effective Date** — The date that the attendance profile became associated with the employee.

- **Expiration Date** — The date that the attendance profile became disassociated from the employee.

- **Attendance Profile** — The name of the attendance profile that is associated with the employee.

- The bottom-level information contains the total number of employees in the report.

Employee Discipline Levels

Employee Discipline Levels Detail lists each employee and the discipline level or levels that the employee is associated with.

If an employee was at a level for at least one day within the selected time period, the level is displayed for that employee.

The actual starting and ending dates for the discipline level may be outside of the selected time period.

Located in:

All

Attendance

Options

None

Report Content

- The top-level heading for each employee included in the report contains the employee's name and ID and the date when their information was last processed.

- **Discipline Level** — The name of the discipline level.

- **Level Start Date** — The date that the discipline level became effective for the employee.

- **Level End Date** — The date that the discipline level ended being effective for the employee. The discipline level that the employee is currently in appears as current in the Level End Date column.

- **Source Policy** — The name of the attendance policy whose rules caused the change in discipline levels for the employee.

- The bottom-level information contains the total number of employees in the report.

Perfect Attendance

Perfect Attendance lists all employees who are assigned to perfect attendance policies that have perfect attendance for the selected time period.

Located in:

All

Attendance

Options

None

Report Content

- The top-level heading for each employee included in the report contains the employees' name and ID and the date when the employee's information was last processed.

- **Source Perfect Attendance Definition** — Perfect attendance definitions that are assigned to the employee who is associated with the attendance transaction. The perfect attendance definitions are sorted alphabetically for each employee.

- **Policy Name** — The name of the perfect attendance definition.

- The bottom-level information contains the total number of employees in the report.

Leave reports

If Leave Management is part of the Workforce Central suite, you can run reports based on Leave data.

Note: In the system, reports might be listed in one or more different categories; for a list of these locations see the appropriate report's page.

Click a report for details.

Leave Configuration reports

Leave Employee-based reports

Employee Leave Document Due Dates

Employee Leave Document Due Dates lists the leave cases along with their associated documents and due dates for employees in the specified time period.

Located in:

All

Leave

Options

None

Report content

- The top-level heading lists the time period and query information for the report. The report is sorted alphabetically by employee.
- **Documents Overdue —** Indicates if an employee has any documents in any leave cases overdue.
- **Leave Case Status** — Indicates if the leave case is open or closed.
- **Leave Category** — The category of the leave case.
- **Leave Case Reason** — The reason of the leave case.
- **Leave Case Code** — The code that is associated with the leave case.
- **Initial Leave Request Date** — The date when the leave request was initially requested.
- **Leave Start Date** — The date when the leave case started. This is left blank if the leave case has not started yet.
- **Leave End Date** — The date when the leave case ended. This is left blank if the leave case has not ended yet.

- **Details on leave cases** — The following details are listed for each leave case:
    - **Document Name** — The name of the leave document.
    - **Document Due Date** — The due date of the leave document.
- The bottom-level of the report lists the total number of employees listed in the report.

Leave Hours Detail

Leave Hours Detail lists details about leave cases for employees in a specified time period.

Located in:

All

Leave

Options

None

Report content

- The top-level heading lists the time period and query information for the report. The report is sorted alphabetically by employee.
- **Leave Case Status** — Indicates if the leave case is open or closed.
- **Leave Category** — The category of the leave case.
- **Leave Case Reason** — The reason of the leave case.
- **Leave Frequency** — Identifies if the leave frequency is intermittent or continuous.
- **Leave Case Code** — The code that is associated with the leave case.
- **Initial Leave Request Date** — The date when the leave request was initially requested.
- **Leave Start Date** — The date when the leave case started. This is left blank if the leave case has not started yet.
- **Leave End Date** — The date when the leave case ended. This is left blank if the leave case has not ended yet.
- **Last Committed Paid Date** — The date of the last committed paid leave time.

- **Last Committed Unpaid Date** — The date of the last committed unpaid leave time.

- **Details on leave case** — The following details are listed for each leave rule:

    – **Day** — The day of the week of the committed leave time.

    – **Date** — The date of the committed leave time.

    – **Indicator** — Indicates if the committed leave time comes from a historical edit by displaying an `H`.

    A `!` symbol indicates an incomplete leave time taking, either the paid or unpaid part is missing.

    – **Leave Time Amount** — The total amount of committed leave time.

    – **Leave Type** — The leave type with committed leave time. Leave types in italic font represent leave times or leave takings that have been manually edited.

    – **Committed Hours** — The amount of committed leave hours that are associated with a leave type.

    – **Additional Information** — Lists any additional information that relates to the leave type, such as the sign-off date marker or the last day of leave marker.

    – The bottom-level of the leave case section lists the total number of committed leave hours for each leave type, and the total number of paid and unpaid hours.

- The bottom-level of the report lists the total number of employees that are represented in the report.

Leave Hours Summary

Leave Hours Summary lists for each employee all open or closed leave cases in the requested time period, as well as any requested leave cases in the requested time period.

Note: Use the Leave Hours Summary (Excel) report if you plan to export results to Excel.

Located in:

All

Leave

Options

None

Report content

The top-level heading lists the time period and query information for the report. The report is sorted alphabetically by employee.

- **Leave Case Status** — Indicates if the leave case is open or closed.
- **Leave Category** — The category of the leave case.
- **Leave Case Reason** — The reason of the leave case.
- **Leave Frequency** — Identifies if the leave frequency is intermittent or continuous.
- **Leave Case Code** — The code that is associated with the leave case.
- **Initial Leave Request Date** — The date when the leave request was initially requested.
- **Leave Start Date** — The date when the leave case started. This is left blank if the leave case has not started yet.

- **Leave End Date** — The date when the leave case ended. This is left blank if the leave case has not ended yet.

- **Total Committed Paid Hours** — The total paid committed hours for the whole leave case.

- **Total Committed Unpaid Hours** — The total unpaid committed hours for the whole leave case

The bottom-level of the report lists the total number of employees that are represented in the report.

Leave Profiles

Leave Profiles lists all configured leave profiles and their corresponding leave categories and leave types.

Located in:

All

Configuration

Options

None

Report content

- **Profile Name** — The name of the leave profile.
- **Description** — The description of the leave profile.
- **Active** — Indicates if the leave profile has a status of Active.
- **Leave Category** — Lists each leave category with any relevant leave type and leave rule information:
    - **Paid Leave Type** — Lists the paid leave types with their corresponding eligibility requirements.
    - **Unpaid Leave Type** — Lists the unpaid leave types with their corresponding eligibility requirements.
    - **Leave Rule** — Lists the leave rules.

The bottom-level of the report lists the total number of leave profiles.

Leave Reasons

Leave Reasons lists all configured leave reasons and the paid and unpaid leave types that are associated with them.

Located in:

All

Configuration

Options

None

Report content

The top-level heading lists the leave category. Below the heading is detailed information about the leave reasons that are associated with the leave category.

Each leave category has information on the total number of leave reasons associated with it at the end of the section.

- **Leave Reason** — The name of the leave reason.
- **Code** — The abbreviation of the leave reason.
- **Paid Leave Types** — Lists the paid leave types that are associated with the leave reason.
- **Unpaid Leave Types** — Lists the unpaid leave types that are associated with the leave reason.
- **Active** — Indicates if the leave reason has a status of Active.

The bottom-level of the report lists the total number of leave reasons.

Leave Rules

Leave Rules lists all configured leave rules.

Located in:

All

Configuration

Options

None

Report content

The top-level heading lists the leave category.

At the end of each leave category section, there is information about the total number of leave rules in the category.

At the end of the report overall, there is information about the total number of leave rules.

- **Leave Rule Name** — The name of the leave rule.

- **Description** — The description of the leave rule.

- **Transaction in Increments of** — The amount of time in which leave takings can be produced by all Step nodes in a rule.

- **Minimum per Transaction** — The minimum amount of time in a single leave taking that can be produced by all Step nodes in a rule.

- **Active** — Indicates if the leave rule has a status of Active.

- **Paid Leave** — Lists the steps (Leave types) or decisions (waiting period qualifier or accrual balance) that are part of the paid portion of the leave rule.

- **Unpaid Leave** — Lists the steps (Leave type) or decisions (waiting period qualifier or accrual balance) that are part of the unpaid portion of the leave rule.

Leave Task List

Leave Task List displays a list of notifications ordered by notification date.

Located in:

All

Leave

Options

None

Report content

The heading of the report gives the date and time that the report was executed and the name of the person who ran the report.

- **Employee Name** — The name of each employee included in the report.
- **Leave Notification Note** — Contains any note left by the employee with Leave Notification.
- **Notification Name** — The name of the Leave Notification.
- **Leave Case Code** — The code that is associated with the leave case.
- **LC Reason** — The reason of the leave case.

Leave Trends

Leave Trends contains monthly information about leave hours spikes, leave reason by category, and paid leave liability by leave reason.

Located in:

All

Leave

Options

None

Report content

- **Seasonal Leave Hours Spikes** — Contains a chart with a monthly view, and a table with a monthly view. The table contains:
    - **Continuous Leave Cases** — The count of continuous leave cases, rolled up by month.
    - **Continuous Leave Hours** — The committed leave time hours in continuous leave cases, rolled up by month.
    - **Wage Liability** — Committed paid takings for each leave time in the Continuous Leave Hours column multiplied by employee's wage rate. The results are rolled up by month.
    - **Intermittent Leave Cases** — The count of intermittent leave cases, rolled up by month.
    - **Intermittent Leave Hours** — The committed leave time hours in intermittent leave cases, rolled up by month.
    - **Wage Liability** — Committed paid takings for each leave time in the Intermittent Leave Hours column multiplied by employee's wage rate. The results are rolled up by month.

- **Leave Reasons by Category —** Contains a chart with a number of leave cases per each leave case reason, split by continuous and intermittent leave cases, and grouped by leave categories. A table contains the same data, split by category and leave reason.

  The table contains the following for each leave reason:

  – **Continuous —** The count of continuous leave cases by leave category and leave reason.

  – **Wage Liability** — Committed paid takings for each leave time in the Continuous column multiplied by employee's wage rate.

  – **Intermittent** — The count of intermittent leave cases by leave category and leave reason.

  – **Wage Liability** — Committed paid takings for each leave time in the Intermittent column multiplied by employee's wage rate.

- **Paid Leave Liability by Leave Reason —** A pie chart that lists the wage liability for paid committed leave takings by leave reason.

Leave Types

Leave Types lists all configured leave types in both the Paid Leave and Unpaid Leave categories.

Located in:

All

Configuration

Options

None

Report content

The top-level heading lists the leave type category:

- Paid leave
- Unpaid leave

At the end of the section, each leave type category has a total number of leave types in that group.

- **Leave Type Name** — The name of the leave type.
- **Description** — The description of the leave type.
- **Code** — The abbreviation of the leave type.
- **Accrual Code** — The accrual code that is associated with the leave type.
- **Pay Code** — The pay code that is associated with the leave type.
- **Active** — Indicates if the leave type has a status of Active.
- **Document** — Lists any documents that are associated with the leave type.
- **Due Date** — Due date information about each document.
- **Reminders** — Information about reminder dates for each document.

The bottom-level of the report lists the total number of leave types across both the paid and unpaid leave type groups.

TeleTime IP reports

If you have configured TeleTime IP in your Workforce Central system, you can run reports that show TeleTime IP data.

Note: In the system, reports might be listed in one or more different categories; for a list of these locations see the appropriate report's page.

Click a report for details.

- "TeleTime IP Alias" on page 362
- "TeleTime IP Employee" on page 363
- "TeleTime IP User Profile" on page 364

TeleTime IP Alias

TeleTime IP Alias lists all pay codes, work rules, valid labor accounts, and labor level entries that have aliases in the system.

Located:

All

TeleTime IP

Options

None

Report content

- **Valid Labor Account** — The name and alias of each valid labor account to which a TeleTime IP alias has been assigned.
- **Work Rule** — The name and alias of each work rule to which a TeleTime IP alias has been assigned.
- **Pay Code** — The name and alias of each pay code to which a TeleTime IP alias has been assigned.
- **Labor Level** — The name and alias of each labor level entry at a given labor level to which a TeleTime IP alias has been assigned.

TeleTime IP Employee

TeleTime IP Employee lists all of the TeleTime IP employees in the system.

Located in:

All

TeleTime IP

Options

None

Report content

- An indication of which ID TeleTime IP employees use to login to the system: employee ID, badge number, or TeleTime IP ID.
- For each TeleTime IP employee:
  - Name
  - Assigned TeleTime IP Profile
  - Employee ID
  - TeleTime IP ID
  - Badge Number
  - Require password change at next TeleTime IP logon: Yes|No

TeleTime IP User Profile

TeleTime IP User Profile lists all of the data in each TeleTime IP User Profile that is defined in the system.

Located in:

All

TeleTime IP

Options

None

Report content

For each TeleTime IP user profile:

- • Name
- • Description
- • Extension Group
- • Call Menu Option
- • Labor Level Transfer Set
- • Pay Code Profile
- • Accrual Profile
- • Work Rule Profile
- • Call Menu Restrictions

Statutory reports

Statutory reports enable managers to access information about their plants in report format.

Note: In the system, all Statutory reports ate listed in both the All and Statutory sections.

Click a report for details:

Muster Roll

Muster Roll is a monthly report that lists a factory's employees and the number of days per month employees work. Use QuickFind or a HyperFind query to create a list from which to generate the Muster Roll report.

A worked day is a day with actual punches. A day with part-time hours is counted as one (1).

Options

None

Report content

The name, address, and registration number of the factory appear in the top-level heading. The report is grouped by factory.

- The report period (month and year), with columns for each day in the month.
- For each employee:
  - **Employee Number** — The employee's ID number.
  - **Name** — The employee's first name, middle initial, and last name.
  - **Date of Birth** — The employee's birth date.
  - **Father's Name** — The employee's father's name.
  - **Designation** — The position that the employee performed for the month.
  - **Daily Attendance** — Days on which an employee was at work are denoted by an X. Any other single value in a cell is the abbreviation of an absence or leave pay code.

    For example, if you have Sick configured as a pay code, and an employee has used the Sick pay code for a particular day, an S appears in the cell.

    A forward slash (/) is used to separate two different items sequentially.

    For example, if an employee works the first part of a day and then goes home sick, the daily attendance cell displays X/S.

- **Remarks** — A blank cell in which managers can write comments.

The bottom of the report contains a key that describes the cell abbreviations.

National and Festival Holidays

National and Festival Holidays lists national holidays and festivals and how employees observed those events:

- Received holiday pay
- Received holiday premiums
- Received regular pay and were entitled to another day off in lieu of the holiday

Options

None

Report content

The report is divided by factory and sub-divided by year.

The top-level heading of each section lists the name, address and registration number of the factory.

- For each holiday:
  – **Holiday Date** — The date of the holiday.
  – **Holiday Name** — The name of the holiday.
- For each employee:
  – **Name** — The employee's first name, middle initial, and last name.
  – **Employee Number** — The employee's ID number.
  – **DOJ** — The employee's hire date.

- **Holiday —** Each holiday cell contains a code:
  - **H** — The employee did not come to work and received holiday pay.
  - **N/E** — The employee did not qualify for the holiday.
  - **W/D** — The employee worked the holiday at a premium.
  - **W/H** — The employee worked the holiday as a regular day, and will take another non-holiday day off as a compensation day.
  - A cell appears blank if the holiday is not in the pay rule for the employee.
- **Remarks —** A blank cell in which managers can write comments.

The bottom of the report contains a key that describes the cell abbreviations.

Service Card

Service Card lists the number of days an employee worked during a one month period at a specific factory. The Service Card report can be viewed or distributed to employees.

Use QuickFind or a HyperFind query to create a list from which to generate the Service Card report.

A worked day is a day with actual punches. A day with part-time hours is counted as one (1).

Options

None

Report Content

The top-level heading lists the month for the report.

- **Factory Name** — The name of the factory where the employee works.
- **Factory Address —** The address of the factory where the employee works.
- **Registration Number** — The factory's number.
- **Name of the Worker** — The employee's first name, middle initial, and last name.
- **Father's Name** — The employee's father's name.
- **Token Number —** The employee's ID number.
- **Designation** — The position that the employee performed for the month.
- **Date of Entry into Service** — The employee's hire date.
- **Total Number of Days in Attendance** — The number of worked days for the month.
- **Manager's Signature** — Space provided for the manager to sign.
- **Hours table:**

- **Date** — The day of the month.
- **HOURS (A.M.)** — The first in-punch of the day.
- **HOURS (P.M.)** — The first out-punch of the day.
- **Total Hours** — The elapsed time between the first in-punch of the day and the first out-punch of the day.
- **Initial** — Space provided for the manager to initial.

Chapter 8

Custom Reports

This chapter contains the following topics:

About custom reports

A custom report is a report that you configure to return only the information that you require. Creating a custom report is a two-step process:

1. Create a custom RDL file using Visual Studio. You can modify an existing RDL file or create a new one.

2. Add the custom RDL file to the appropriate location on all application servers.

Custom reports can use report options and be scheduled and automatically distributed through e-mail, just like standard reports. Custom reports can also use custom report options.

Creating custom reports requires:

•   Access to Visual Studio and the ability to customize or create reports in the Report Definition Language (RDL).

•   Knowledge of the tables and views in the database.

    For detailed information about these tables and views, refer to the *Database Tables Reference Guide* and the *Database Views Reference Guide* for this product.

•   Knowledge of how to deploy custom RDL files and how to create report items that reference those files.

Note: All RDLC 2005 custom reports should be switched to run on the RDLC 2010 engine.

Current custom reports will still run on both RDLC 2005 and 2010. All new reports will run on RDLC 2010.

About custom options

Creating a custom report option allows you to filter the results of a report based on your own set of criteria. Custom options can only be used with custom reports.

Creating a custom report option for use with a report is a three-step process:

1. Define a custom report Parameter in the report definition file.

2. In Report Setup, configure a custom option with the same properties as the parameter.

3. Assign the custom option to the appropriate report item.

Creating custom report options requires:

- Access to Visual Studio and the ability to customize or create reports in the Report Description Language (RDL).

- Knowledge of the tables and views in the database.

  For detailed information about these tables and views, refer to the *Database Tables Reference Guide* and the *Database Views Reference Guide* for this product.

- Knowledge of how to configure custom options and assign them to report items within Report Setup. Refer to "Configuring and assigning a custom option" on page 380 for more information.

Report setup tasks

Common tasks associated with Reports Setup include:

- "Creating a report item" on page 376
- "Assigning reports to categories" on page 378
- "Configuring and assigning a custom option" on page 380
- "Guidelines and rules for creating and using custom options" on page 381
- "Deleting a custom report" on page 378

Adding a custom report requires that you create a report item in the system.

Note: After you add a custom report, add it to any necessary Reports Data Access Profiles so that the appropriate people can access the report.

Creating a report item

An access control point controls the ability to create a report item. If you have the necessary access rights, you can create a report item in one of two ways:

- By duplicating an existing report item and modifying its settings
- By creating an entirely new report item

To create a report item:

1. In the Report Setup tab, click **New** or highlight a report item in the list and click **Duplicate**.

2. Enter a name and description for the report. The name is a required entry.

   Tip: Select a name that is easy to remember and that indicates the content of the report. It is the name of the report item that appears in the list of reports in the Reports page.

3. In the Report File name box, enter the file name of the RDL file to which the report item refers. Include the .rdl extension in the file name. For example, `custom_report.rdl`.

4. Select the following, if appropriate:

   – **Requires HyperFind Query** — If you configured the custom RDL file to accept the results of a HyperFind query. After you select this option, HyperFind queries are enabled in the system for this report.

   – **Contains Totals Data** — If your custom report displays employee totals and you want to implement the system's built-in capabilities to check for up-to-date totals before running the report.

   – **Limit Number of Employees** — To prevent the report from returning data for more than a preset number of employees. Enter the maximum number of employees to allow in the report.

     If the report returns more than the maximum number of employees, the system generates a message requesting you to select a query that returns fewer employees. Minimizing the number of employees included in a report improves performance.

   – **Time Periods** — To limit results in this report to a specific time period. A time period can be for pay periods or non-pay periods. Pay periods can be different for each employee on a report. Non-pay period time periods contain the same date range for all employees.

   – **Uses Accelerator(s)** — A read-only setting associated with scheduling reports that use a Report Accelerator process to generate reports.

5. To assign this report to report categories, click **Categories**, and then select the check boxes for one or more categories.

   All report items are automatically included in the All category.

   Note: For steps 4 and 5, the RDL file must be configured for these same settings.

   ---

6. Select the appropriate options for the report.

   To select an option, highlight the option in the Available Options list and click **Add**. Hold down the Ctrl key to select more than one option, or click **Add All**.

Removing options works in a similar way: Select the option from the Selected Options list and click **Remove** or **Remove All**.

When selecting a custom option for a custom report in Reports Setup, select both the main option and the corresponding header option, if applicable.

7. Click **Save**.

Deleting a custom report

If a custom report becomes obsolete, you can delete the report item. After you delete a report item, the report is no longer accessible through the Reports component.

To delete a report item, select the report from the list in the Report Setup tab and click **Delete**.

You cannot delete standard report items.

Note: If you do not plan to ever use the report again, you can delete its definition file from the custom report folder in the product directory structure on all application servers.

Assigning reports to categories

You can assign a report to additional categories or remove it from categories to which it is currently assigned.

1. In the Report Setup tab, select the report that you are assigning or reassigning.

2. Click **Categories** to open the Categories dialog box.

3. Select the check boxes for the categories to which you are assigning the report and clear the check boxes for the categories from which you are removing the report.

4. Click **OK**.

Choose from the following reports categories:

•   **All** — All of the reports (standard and custom) that are available to the user.

- **Accruals** — Reports that contain information about accrual balances and calculations.

- **Activities** — Reports that use Activities data; appears only if Activities is installed on your system.

- **Attendance** — Reports on Attendance information, such as actions, detail, and balances; appears only if Attendance is installed.

- **Biometrics** — Reports on Biometric enrollment.

- **Configuration** — Reports that contain information about the setup of the system.

- **Data Collection** — Reports that contain information about data collection devices and activity codes.

- **Detail Genie** — Reports that relate to the Detail Genies. This list of reports appears by default when you click the Reports launch button when viewing a Detail Genie.

- **Import** — Reports that contain information about imports that have been run. This list of reports appears by default when you click Check Status in the Administration tab of the Import workspace.

- **Leave** — Reports on Leave activities and trends; appears only if Leave is installed.

- **Roll-Up Genie** — Reports that relate to the Roll-Up Genies. This list of reports appears by default when you click the Reports launch button when viewing a Roll-Up Genie.

- **Scheduler** — Reports that contain information related to scheduling and employee schedules. This list of reports appears by default when you click the Reports launch button from within one of the Schedule Genies.

- **Statutory Reports** — Describes the Statutory reports.

- **Timecard** — Reports that contain information from and about employee timecards. This list of reports appears by default when you click the Reports launch button from within the Timecard workspace.

- **Working Time Directive** — Reports that provide information about employees affected by Working Time Directive rules.

- **Other Reports** — A generic category for custom reports that do not logically fit into any of the standard categories.

Configuring and assigning a custom option

An access control point controls the ability to create a custom option. If you have the necessary access rights, you can create a custom option in one of two ways:

- By duplicating an existing custom option and modifying its settings
- By creating an entirely new option

Note: The settings for a custom option must reflect those of a report parameter defined in an RDL file.

1. In the Report Setup workspace, click the **Custom Options** tab.
2. Click **New** or highlight an option in the list and click **Duplicate**.
3. In **Option Name**, enter the same name that you gave to the corresponding parameter in the RDL file.
4. Enter other information as follows:
   - **Description** — Add information about the option that may help the user choose when to use the option.
   - **Value Type** — Enter the type of information that this option holds: a number, a string, or a date and time. These values correspond to Integer, String, and DateTime parameter settings, respectively, in Visual Studio.
   - **Display at Run Time** — Select from a drop-down menu whether to have the pick list value or the pick list description associated with the value appear at runtime.
   - **Create header option** — If you created a header parameter in Visual Studio that corresponds to the main parameter that you are configuring here, select this check box and a header option will be created automatically.
   - **Allow to pick multiple values at runtime** — Select this check box if you want the option to allow for multiple value entries. This must match the

setting in the Multi-value check box for the corresponding parameter in Visual Studio.

– **Pick List Values** — Add possible values for option and descriptions into this table to allow the user to pick from a list when defining the option at runtime. If you chose to have the descriptions display at runtime, both the value and description boxes are required here. At runtime, users can enter values not included in the Pick List using the Ad Hoc Value text box.

5. Click **Save**.

The new custom option and its header option, if you chose to create one, now appear in the list of available options on the Reports Setup tab.

Note: Click **Refresh** if the new option does not appear in the list automatically.

6. Add the option to the list of Selected options for your custom report. This new custom option is now available for use on any other custom report item and RDL file that is created.

Guidelines and rules for creating and using custom options

- The option name in the application and the parameter name in Visual Studio must be the same.

- The properties, such as value type and multiple value setting, applied in the Custom Options setup must match those entered as part of the definition of the parameter in Visual Studio.

- The system does not support setting default values for custom options.

- When creating a header parameter in Visual Studio, give it the same name as the main parameter followed by an underscore and then "hd."

  For example, a header parameter corresponding to a main parameter named "Labor_Level_1" would be named "Labor_Level_1_hd." The value type for header parameters must be "string" and you must set header parameters to receive one value.

- You can use a custom option with one or more custom reports as long as the report definition file for the custom report contains the matching custom parameter.

- When selecting a custom option for a custom report in Reports Setup, select both the main option and the corresponding header option, if applicable.

- If a custom report using custom options is scheduled, the custom option values set before scheduling are the values that are used for the scheduled report.

- Custom options of type date and time are not intended to override the standard time period selection for a report. Instead, use date and time options to further define criteria for selecting data from an already qualified time period, or use them in reports that do not rely on a time period selection.

  For example, a report could return timecard details for the previous pay period for all employees who were hired before June 1. The previous pay period would be the time period selection and June 1 might be entered in a date type report option.