Report Definitions

Below is a list of the standard (ready-made) system reports. Within the main menu, most reports are found in the individual view menu: Several reports can be found in the team view menu: Report accessibility is determined by individual security settings.

> Accruals

- **Balances**- Per employee, per time off category being accrued. Shows number of days/hours earned, taken, scheduled and remaining.

> My Reports > HR Reports > Calendar

- **Anniversary By Month** - Shows a calendar view by month for all employees to which you have access.
- **Anniversary By Week** - Shows a calendar view by week for all employees to which you have access.
- **Anniversary By Year** - Shows a calendar view by year for all employees to which you have access.
- **Birthday By Month** - Shows a calendar style page with employee birthdays highlighted by month.
- **Birthday By Week** - Shows a calendar style page with employee birthdays highlighted by week.
- **Birthday By Year** - Shows a calendar style page with employee birthdays highlighted by year.

> My Reports > HR Reports > HR Maintenance

- **Cost Centers Accessible To Employee** – Provides a list of all employees and the Cost Centers they have access to.
- **Employee Contacts** – Provides a list of all employees and their personal contacts.
- **Employee Information (Labels)** – Provides a configurable list of employees and their information that can be exported and printed on labels.
- **Employee Information (Printing)** – Provides a configurable list of employees and their information that can be exported and printed.
- **Employee Notes** – Shows all employees and any notes they have associated with their accounts.
- **Employee Roster**- Shows all basic information and main settings for each employee (profiles).
- **Employee Status Changes** – Shows a report containing information from the Account Status field of Employee Information. The columns "New Status" and "Old Status" (i.e. Active, Inactive, etc.) will show any changes made to this field, along with the user//date/time of the change.
- **Employee Summary**- Shows employee access to cost centers and managers assigned to them.
- **Hardware Settings** – Can provide a report of the hardware devices assigned to or used by an employee. Add columns to view the specific hardware information you wish to view.
- **Seniority -** Shows all employee dates (hired, started, etc.)

> My Reports > Time Reports > Time Allocation

- **Time Summary By Week** – Displays a summary of employee time for the current/past/future week or month. The hours are shown by day on each of these reports.
- **Detailed Hours**- Shows individual time records. Custom filters are available. Also included is the filtering option, “Last N Days And Last N Hours” which requires that the “Extra Filters” checkbox be checked and a Calendar Range be selected. This filter will show corrections that were made during specified days, hours, or days and hours.
- **Detailed Hours Overview (PDF)** - Calendar view of hours per person, with the ability to enable time entry approval by clicking an employee where you are taken to the timesheet where approvals can be applied. Export option to PDF is available.
- **Detailed Hours Overview**- Calendar view of hours per person. Timesheets may be viewed by selecting employees and clicking the View Timesheets button. Export option to HTML available.
- **Summary Hours**- Summary of hours based on columns chosen.
- **Summary Hours by Employee**- These are pre-defined settings.
- **Summary Hours by Cost Center**- These are grouped by specific cost fields or date range.
- **Summary Hours by Day**
- **Summary Hours by Week**
- **Time Off Calendar**– Provides a yearly view of approved time off requests, with the ability to drill down daily by clicking on the hyperlink.
- **Time Off Calendar** (Monthly)- Provides a monthly view of approved time off requests, with the ability to drill down weekly by clicking on the magnifying glass.
- **Time Off Calendar** (Weekly)- Provides a weekly view of approved time off requests.
- **Late/Early/Absent Report**- Based on a schedule, shows who is early/late/absent. The Scheduled vs. Worked Time column is available for this report, which will take the amount from the Sch.Total column, subtract the amount from the Work Hours column, and place the difference into the Scheduled vs. Worked Time column. (i.e. Sch. Total of 8.00 – Work Hours of 3.00 = Scheduled vs. Worked Time of 5.00 hours)
- **All Timesheet Notes** – Will display all notes entered for employees in the time period specified.
- **Exceptions** - Shows a more detailed view of the Exceptions.
- **Exceptions Summary by Week** - Will display, per employee, any Exceptions flagged within a specific date range, color-coded based on the Exception configuration. Then, by clicking on an Exception, you will be taken to the employee’s timesheet and to the day where the Exception is flagged.
- **Rules Analysis** – Allows you to select an employee account and time period and then analyze new records and changed fields within the following: Employee Information, Current Pay Period Totals, Raw Input, Shift Total and Daily Total. The report will list the rules assigned to the employee with selectable hyperlinks. The report may also be downloaded as an PDF.

> My Reports > Time Reports > Calculated Time

- **Calculated Time Summary** - Displays a summary total of the calculated time worked by total work hours and pay categories (worked and time off hours). Summary hours by Pay/Time off (total time). Custom filters are available. The report may be exported to multiple types of outputs. To view Counters from this report, add the Counters column from Select Columns. You can click the “View Time Entries” button in the lower-right corner of the report to see a calculated time summary for time entries as well as counters. This allows time off entries to be viewed even if they have not been put into counters. The button is a toggle and will alternate between View Counters and View Time Entries.
- **Calculated Time By Calendar Day** - Shows employee summary hours by day. To view Counters from this report, add the Counters column from Select Columns. You can click the “View Time Entries” button in the lower-right corner of the report to see a calculated time summary for time entries as well as counters. This allows time off entries to be viewed even if they have not been put into counters. The button is a toggle and will alternate between View Counters and View Time Entries.
- **Calculated Time Summary By Week** – Displays a summary total of the calculated time worked by total work hours, and pay categories (worked and time off hours). Will default to weekly, but you can select date ranges and pay periods, along with the first weekday to begin the report. The report may be exported to multiple types of outputs. To view Counters from this report, add the Counters column from Select Columns. You can click the “View Time Entries” button in the lower-right corner of the report to see a calculated time summary for time entries as well as counters. This allows time off entries to be viewed even if they have not been put into counters. The button is a toggle and will alternate between View Counters and View Time Entries.
- **Calculated Time by Work Day** - Detailed calculated time by day. The Scheduled vs. Worked Time column is available for this report, which will take the amount from the Total Scheduled Time column, subtract the amount from the Total Work Hours column, and place the difference into the Scheduled vs. Worked Time column. (i.e. Total Scheduled Time of 8.00 – Total Work Hours of 9.00 = Scheduled vs. Worked Time of -1.00 hours) To view Counters from this report, add the Counters column from Select Columns. You can click the “View Time Entries” button in the lower-right corner of the report to see a calculated time summary for time entries as well as counters. This allows time off entries to be viewed even if they have not been put into counters. The button is a toggle and will alternate between View Counters and View Time Entries.
- **Calculated Cumulative Counter** – Only available with Pay Calculations 2.0 companies. The report shows only cumulative counters, although the counters can be time-based, quantity based, or amount based counters. The report has a check box, Display Last Result Per Counter, which shows the existing last value for the time period selected (not the value from the end date of the period). If this check box is unchecked, the last value at the end of the period (if any) is shown. If the flag is not selected, the last known entry for the cumulative counter will be shown. In addition, if the report is customized to select the Date column (Tools > Select Columns), the

report rows will show a detailed view of the value in the cumulative counter for each date in the report period.

- **Detailed Calculated Time**- Employee workday view separated by pay categories. The report can be toggled between "View Time Entries" for the time view and "View Counters" for those companies utilizing Counters.
- **Detailed Corrected Time -** This report will display Timesheet information regarding all historical time entries for the selected period. You may select to "Show Only Most Recent Historical Timesheets," and/or; "Show Current Timesheets."
- **Lunch and Breaks** - Shows a summary of hours per day spent on Lunch and Breaks, both paid and unpaid.
- **Average Calculated Time** - Displays weekly average working time over a selected period, which by default is 17 weeks. Average working time is calculated according to selected counters from the employee's current timesheet. The values from the counters are summed up and an average amount is calculated for the selected period.

  There is also an opportunity to select Time Offs that are not counted as worked time. In this case, days within the report period that contains any of these time offs are excluded from the calculated average, even if the day also contains worked time. Selected period is extended for each day that is excluded.

  The number of days with Time offs are displayed in "Amount Padded Days" column. If report date range includes future dates, the system uses the scheduled total hours. If scheduled total hours are not set, then the system uses standard workday hours from Employee Information. In case the Standard Workday Hours field is empty, the system will use standard workday hours from Company Information. The number of future days are displayed in "Amount Days In Future" column and average working total time is marked in red.

> My Reports > Time Reports > Audit Trail

This sub-menu contains audit reports that will show before/after values when employee time has been edited. Reports include:

- **Overtime Requests**
- **Time Adjustment Entries**
- **Time Entries**
- **Time Off Requests**
- **Timesheets**

> My Reports > Schedule Reports

- **Scheduled vs Actual Detailed** – This report will show the actual hours employees worked, along with their scheduled hours and then calculate the variance between the two. Variances can be shown in hours and/or percent. Rate information is also available, showing the rate for the actual time worked along with the rate for the scheduled hours.
- **Scheduled vs Actual Summary** – Shows scheduled hours vs actual hours based on employees' time entries.

> My Reports > Recruitment Reports

- **Time to Hire** - This report will display each job requisition, along with the Start and End Date of each requisition and the total number of days the requisition will be (or was) open. The report also has a *Time to Hire* column which will determine how long it took to hire an employee for a specific job requisition. If a position has not yet been filled, the requisition will still display, without an employee attached and no *Time to Hire* data.

For information on sorting report data or creating custom reports, please review the **UEIWorkforce Job Aid – Reporting Basics** at www.ueiworkforce.com. For more information about UEIWorkforce reports, select the help icon on the upper right of your dashboard: ?

Within Help/System Documentation, use the search field to find additional information on reports and reporting functions in UEIWorkforce.

Questions? Contact UEI Human Resources at uei-hr@csus.edu or call (916) 278-7003.