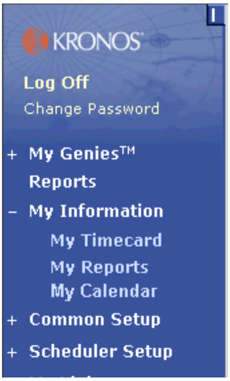
Generating Reports

The Reports component, which is accessed from the Workforce Timekeeper navigation bar, enables users to select and run an existing report. The report can be a standard report or a previously created custom report.

When you run a report, the system extracts data from the database and formats it in rows and columns as a report. According to your access rights, the following links might appear on your navigation bar:



- **My Reports**—Three reports provide your accrual balances and projections, schedule, and time detail.
- **Reports**—More than 40 standard management reports provide a wide range of information, such as hours by labor account, punch origins, and absent employees.
- **Report Setup**—These tools provide settings to configure custom reports.

The Reports component provides a full complement of standard reports, all of which are sorted into nine categories:

- All
- Accruals
- Configuration
- Data Collection
- Detail Genie
- Import
- Roll-Up Genie
- Scheduler
- Timecard

Every report available appears in the All category. When you select a report, a description of the selected report appears in the adjacent pane. You can also reassign reports to other categories or create custom reports that contain only the data you need.

After selecting a report, you can:

- Run and preview the report
- Print or e-mail the report immediately
- Schedule when to print or e-mail the report

Running a Report

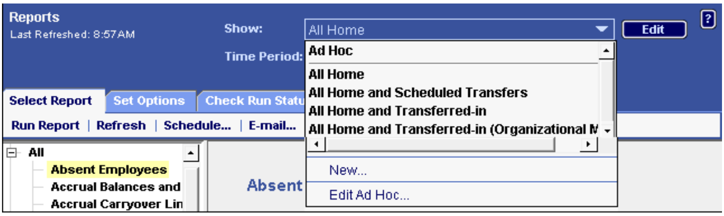
You can run a report in either of two ways:

- Select Reports from the navigation bar.
- Select the Reports launch button from another Workforce Timekeeper component such as from a Genie or a timecard.

Using the Navigation Bar to Run a Report

To run a report using the navigation bar:

1. Select Reports from the navigation bar.
2. In the Categories list, select a report.
3. Click the Show drop-down arrow to select a previously created HyperFind query.



4. To view or change the query, click Edit, which opens the HyperFind component. On the HyperFind page, you can view the details of the query or edit the query. When finished, click the browser Back button to return to the Reports workspace.
5. If the Specific Date dialog box opens, enter or select a date using the same format that appears in the dialog box and click OK.
6. To change the time period, click the Time Period drop-down arrow and select the new time period.
7. To change the report options, select a report, then select Set Options. You can set the following options:
   - **Specific report options**—Report options allow the report to filter on additional parameters beyond HyperFind or People so that you see only the data that you want in a report. Options that you can set differ for each report. For example, the ability to select certain exceptions to appear on a report is accomplished by using the Exceptions Report Option with the Exception Report.

     Available options appear in the Options list with the corresponding selections in the Details section. Refer to the list of reports to review the details of each report.

- **E-mail Format**—Adobe Acrobat is the default file format for reports. If you are going to e-mail a report, you can change the file format to Hypertext Markup Language (HTML), Microsoft Excel Document, Microsoft Word Document, or Rich Text Format. You cannot change the report format if you are going to view or print the report.

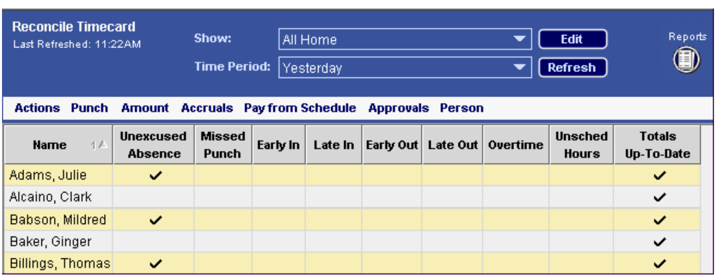
8. From the Select Reports menu, select Run Report.

Note: Standard reports are optimized for PDF format. If you choose to print in another format, you may need to create a custom version of the standard report so that the data is properly formatted.

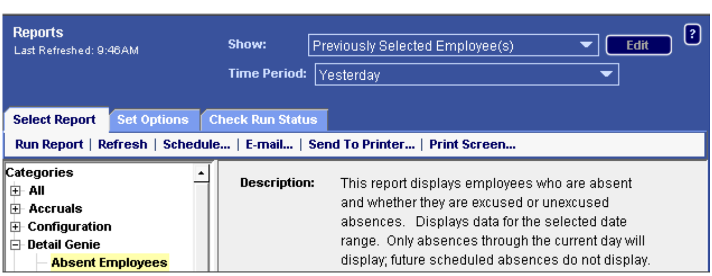
Using Reports Launch to Run a Report

The following example shows how to run a report using the Reports launch that displays people in your group with unexcused absences:

1. From the navigation bar, select **My Genies** > **Reconcile Timecard**.
2. In the Reconcile Timecard workspace, select a Time Period and the employees who show unexcused absences, then click the Reports launch button.



The Reports workspace opens. Previously Selected Employee(s) and Yesterday appear as selections:



3. Click the Select Report tab and select the type of report.

4. If applicable, click the Set Options tab and enter report options such as specific pay codes to appear on the Employee Hours by Labor Account report or type of exceptions to appear on the Exception report.
5. Select Run Report from the Select Report menu.
6. Click the Check Run Status tab to monitor the status of the report, for example, “Waiting,” “Running,” or “Complete.” Periodically click Refresh Status to update the status.
7. When the report finishes processing, select **Check Run Status** > **View Report**.

Creating Custom Reports

The Report Setup component under Common Setup on the navigation bar in combination with Crystal Reports software enables you to create custom reports. After you create a report, it can be made available to general users through the Reports selection on the navigation bar.

With the Report Setup capability, you can:

- Create custom report options
- View the configuration of existing reports
- Change the categories to which existing reports are assigned
- Duplicate existing report items and save them with different settings
- Create new report items that reference report definition files that you write

You will only see the custom reports that you generate unless you have additional access rights.

Printing a Report

To print a report directly to a printer after the report has been generated:

1. Select a report from the Categories list.
2. From the Select Reports menu, select Send to Printer.
3. In the Send to Printer dialog box, select a printer and click OK.