

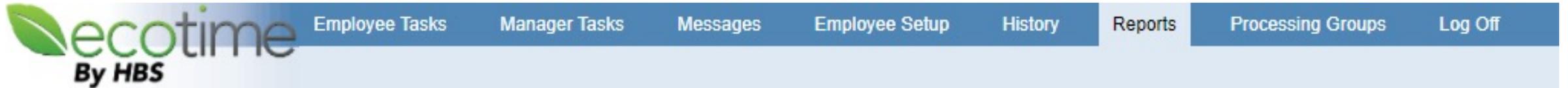


ecotime

Reports 81

# Access to Reports

- Reports are located in EcoTime Web Browser > Reports



- Report Access is given based on Delegation Access.
- Supervisor and Timekeepers have the ability to review their employees within 'Reports'.
- You will only be able to see the employees you have delegation authority over.
- If you can not view their timesheet you will not be able to see the employee in 'Reports'.



The logo for 'ecotime' features a stylized green leaf icon to the left of the word 'ecotime' in a lowercase, sans-serif font. The 'eco' is in green, and 'time' is in grey.

# Understanding Report Icons



# Icons

Understanding the Icons to reports:

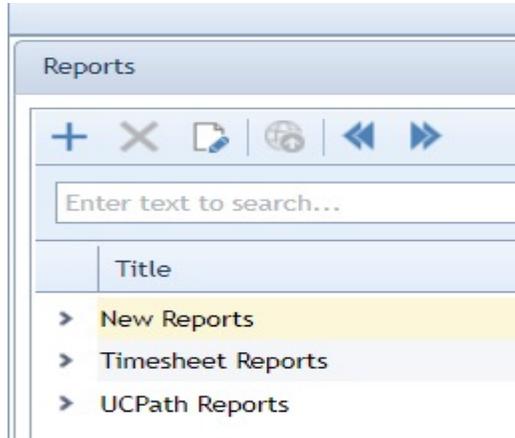


- To create a 'New' Report 
- To delete an existing report 
- To copy an existing report 
- Shared Filters between reports  (Functionality will be follow-up with additional training)
- \*Schedule a report to run – Currently not available 
- Refresh 
- Grid Preview – This will be how you run the report 
- \*To view a report in graph form – Currently not available 
- \*Saved Filter, and Report Schedule – Currently not available 

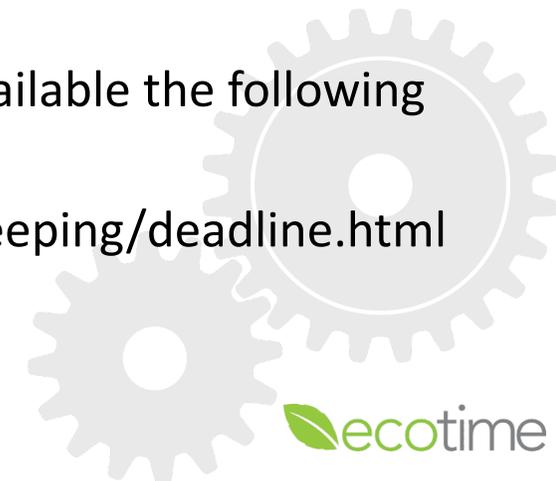


# Report Groups

- Click on the “>” arrow in the navigation panel to the left and select a report to view an existing report.

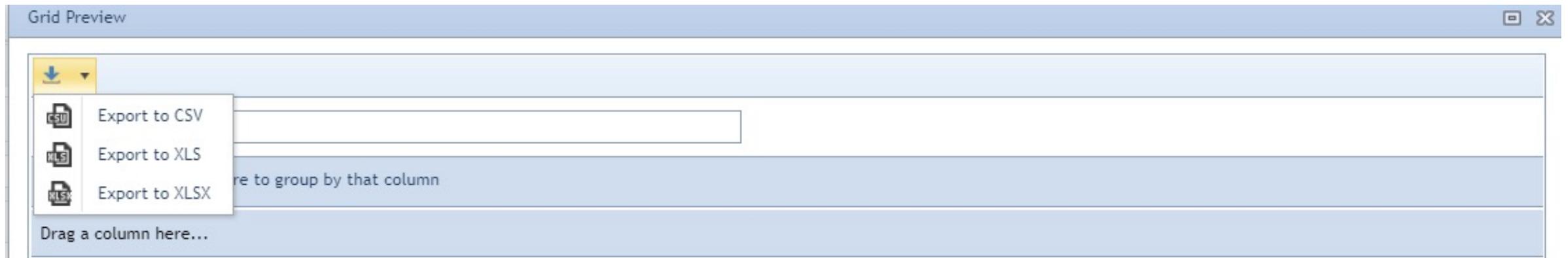


- ‘New Reports’ and ‘Timesheet Report’ are EcoTime reports. These are calculated by what is inputted into EcoTime.
- ‘UCPATH Reports’ are reports with the i181 that was submitted to UCPATH. These are available the following business day after the timekeeping deadline.
- Please view timekeeping deadlines here: <https://blink.ucsd.edu/finance/payroll/timekeeping/deadline.html>



# Running a Report

- By selecting 'Grid Preview'  this will allow you to run and preview a report. Then you can export the report to an a CSV, or excel spreadsheet.



- It will be a pop-up on your web browser.
- This is the only way to save a report to your desktop.



# Filter Logic

Ecotime Help and Resources

8:39 PM

Create/Edit Filter

Title: George Report

Description:

Shared  Published

And

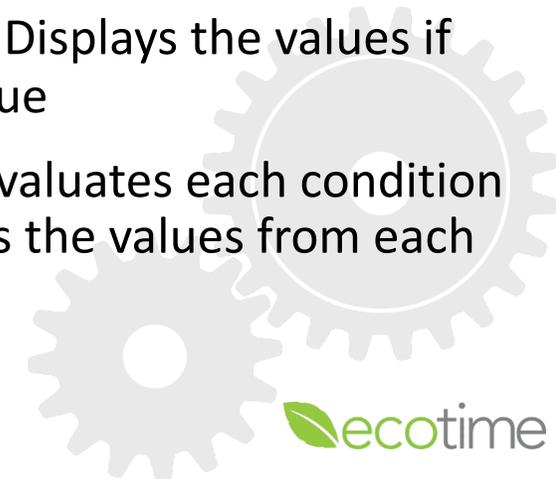
Period End Date Equals 8/21/2021

Apply Changes Cancel

And

- And
- Or
- Not And
- Not Or
- Add Group
- Add Condition
- Remove

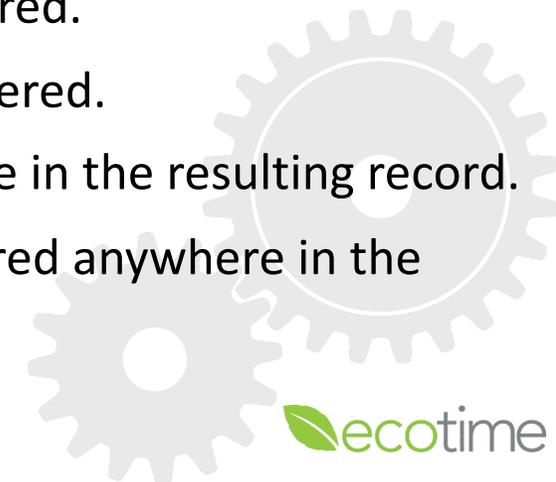
- Each report will give you different filter options. From the filters, you can customize the reports needed specifically for your department.
- Step conditions is where the logic is placed.
- Filter Value: **AND** - Displays the values if all conditions are true
- Filter Value: **OR** - Evaluates each condition individually and displays the values from each condition if true
- Filter Value: **NOT AND** - Displays the values if all conditions are not true
- Filter Value: **NOT OR** - Evaluates each condition individually and displays the values from each condition if not true



# Filtering a Report

- = Equals
- ≠ Does not equal
- Is blank
- Is not blank
- ⋯ Is any of
- ⋯ Is none of

- Specific reports will query according to the fields available.
- **Equals**: The results returned must exactly match the values entered.
- **Does not equal**: The results returned do not exactly match the values entered.
- **Is greater than**: The results returned will be greater than or exceed the values entered.
- **Is greater than or equal to**: The results returned will be greater than or equal to the values entered.
- **Is less than**: The results returned will be less than or precede the values entered.
- **Is less than or equal to**: The results returned will be less than or equal to the values entered.
- **Is between**: The results returned must be between the two values entered.
- **Is not between**: The results returned will be outside the two values entered.
- **Contains**: The results returned will contain the values entered anywhere in the resulting record.
- **Does not contain**: The results returned will not contain the values entered anywhere in the resulting record.



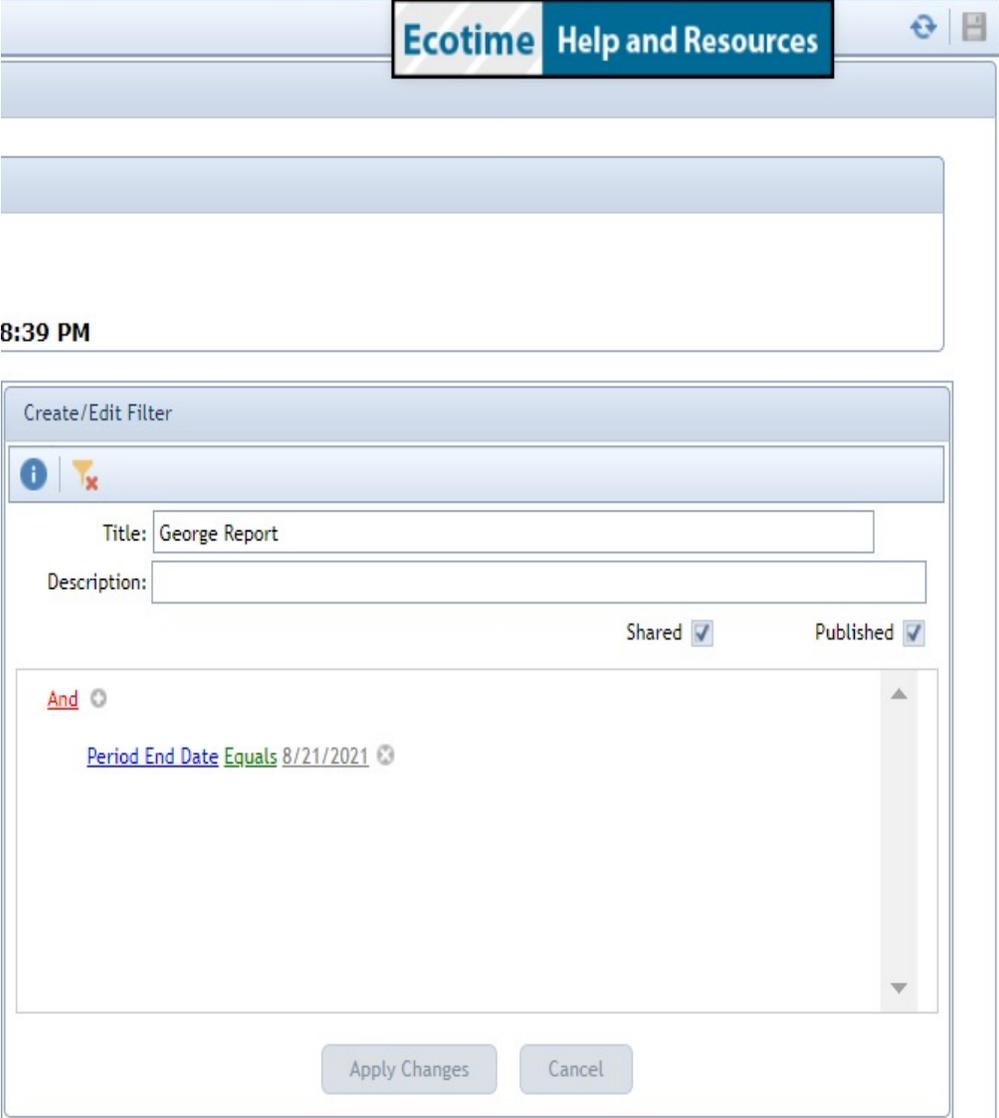
# Filtering a Report

- Employee Name
- Employee Number
- Employee Category
- UCPath ID
- FLSA Code
- Manager Number (UCPATH)
- Hire Date
- Supervisor Number (UCPATH)
- Hours Per Day
- Hours Per Week
- Pay Codes
- Title Code
- Timesheet Date
- Period End Date
- Timesheet Group
- Bargaining Unit
- Processing Group
- Department
- Assignments
- Sub Account
- Manager Number
- Overtime Profile
- Hours Type
- Pay Frequency
- Salary Hourly
- Status Code
- Supervisor Number
- Position

- **Begins with:** The results returned will match the values entered from the beginning of the resulting record.
- **Ends with:** The results returned will match the values entered from the end of the resulting record.
- **Is like:** The results returned will contain the values entered anywhere in the resulting record. You can use the % that will return all values.
- **Is not like:** The results returned will not contain the values entered anywhere in the resulting record. You can use the % that will return all values.
- **Is any of:** This field will allow you to add multiple values into the filter. The results returned will exactly match the values entered.
- **Is none of:** This field will allow you to add multiple values into the filter. The results returned will not match the one or more values entered.
- **Is blank:** The field will return only field values that are blank.
- **Is not blank:** The field will return only field values that are not blank.



# Filtering a Report



Ecotime Help and Resources

8:39 PM

Create/Edit Filter

Title: George Report

Description:

Shared  Published

And

Period End Date Equals 8/21/2021

Apply Changes Cancel

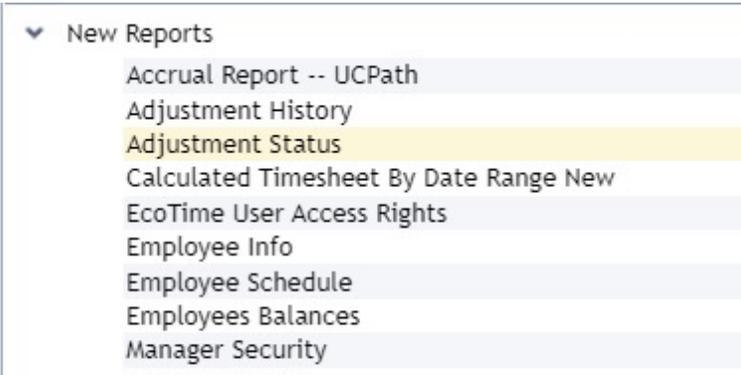
- To Save the Filters for future use, it's on the top right corner. 
- The 'Shared' option is available to Authorized users to access and run reports. Shared filters are stored in a library of filters by report that can be retrieved by Authorized users granted access. (We will explain in further detail in a future zoom.)
- The 'Published' filters will automatically display to all Ecotime users by report.
- Tip: Minimize your screen to be able to see more on the report. Depending on the browser you are in you may select CTRL – to minimize your screen. Minimizing your screen is important to allow for more visibility when in 'Reports.'





Scenarios

# Adjustment Status



- Adjustment Status Report is located under the New Reports > Adjustment Status
- With adjustment being open up to 4 pay period ends, this report will help alleviate some of the manual review of timesheets. Versus going page by page to review if an employee made a time adjustment in a previous pay period, this report will show if an adjustment is not approved, if an adjustment is pending, and if an adjustment has approval.

UC Path ID	Processed Status
Employee Name	Timesheet Group
Pay Period	Supervisor Number (UCPATH)
Adjustment Pay Frequency	Supervisor Name
Entered By	Supervisor Email
Entered On	Manager Number (UCPATH)
Approval Status	Status Code
Approved By	Employee Category
Approval Action Date	FLSA Code
Approval Date	Bargaining Unit
Approval User ID	Department
Processed By	Salary Hourly
Processed Date	

## Why is this report helpful:

- This report will tell you if an employee made a time adjustment.
- This report will tell you who the action user was.
- This report will tell you when the action was made.
- This report will tell you if the time adjustment was processed successfully.
- This report will tell you if it was approved who approved, and when as well.



# Calculated Timesheet By Date Range New Report

▼ New Reports

- Accrual Report -- UCPath
- Adjustment History
- Adjustment Status
- Calculated Timesheet By Date Range New
- EcoTime User Access Rights
- Employee Info
- Employee Schedule
- Employees Balances
- Manager Security

- Calculated Timesheet By Date Range New Report is located under the New Reports > Calculated Timesheet By Date Range New
- The Calculated Timesheet takes the inputted time, and calculates if the employee qualifies for overtime, shift differential, premium pay, etc. This calculation is done by the configurations within the application, and with guidance of Labor Relations and Employee Relations.

UC Path ID	Bargaining Unit
Employee Name	ppenddate
Timesheet Date	Processing Group
Pay Codes	Salary Hourly
Pay Code Name	Status Code
duration	Hours Type
Position Number	managementgroup
Job Code Title	Manager Number (UCPATH)
Overtime Profile	Manager Name
Department	Supervisor Number (UCPATH)
Pay Frequency	Supervisor Name
Hours Per Day	Pay Rule Profile
Hours Per Week	Title Code
Employee Category	Employee Category1
FLSA Code	

Why is this report helpful:

- This report will tell you the pay codes that were entered.
- This report will tell you the duration of time entered.
- This report will tell you will calculate overtime, holiday, and shift differentials.
- This report will tell you how the employee is configured showing bargaining unit, overtime profile, and job code.



# Timesheet Input Report

- ▼ Timesheet Reports
  - Alert Message Queue
  - Alert/Email Audit
  - Holiday Only Timesheet
  - Time Collection
  - Timesheet Actions Audit
  - Timesheet Input

- Timesheet Input Report is located under the Timesheet Reports >Timesheet Input Report.

### Why is this report helpful:

- This report will tell you what action was made.
- This report will tell you who the action user was.
- This report will tell you when the action was made.
- This report will tell you if there are any notes on an pay period end date along with what the notes was.

UC Path ID	Supervisor Number (UCPATH)
Employee Name	Supervisor Name
Pay Period End Date	Status Code
Timesheet Date	Bargaining Unit
Pay Codes	Job Code Id
Time In	Job Code Description
Time Out	Department
Pay Code	FLSA Code
Assignments	Salary Hourly
Position Number	Employee Category
Duration	Pay Frequency
Entry User	Entry Date
Entry Date Formatted	Entry User ID
Period Notes	inhistory
Management Group	Title Code
Manager Number (UCPATH)	Position
Manager Name	Has Notes
Timesheet Group	



# Output Summary UCPATH

▼ UCPATH Reports

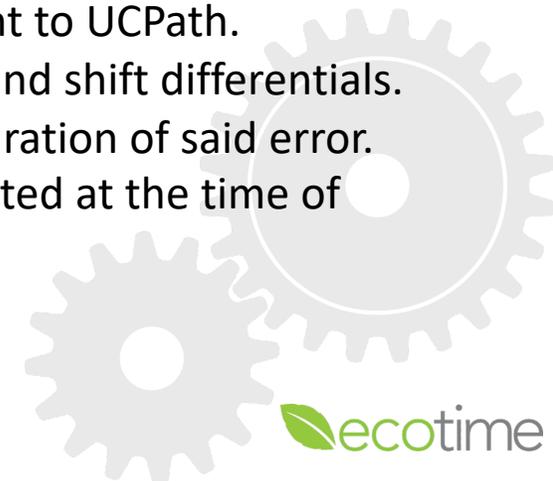
- Output Detail Campus ODS
- Output Summary Campus ODS By Earn Code
- Output Summary UCPATH
- Pay Code to Earn Code Mapping
- Timesheets not in Output

UC Path ID	Active Status
Employee Name	Employee Status
Pay Period End Date	Employee Category
Hours	FLSA Code
Timesheet Date	Title Code
Earn Code	Bargaining Unit
Earn Code Title	Processing Group
Valid Earncode	Department
Position Number	Manager Number (UCPATH)
Employee Record	Pay Frequency
FMLA Indicator	Supervisor Number (UCPATH)
Included In i181	Salary Hourly
Has Position	Status Code
payoverride	

- Output Summary UCPATH Report is located under the UCPATH Reports > Output Summary UCPATH
- The Output Summary UCPATH is available the following business day after timekeeping has closed. The Output Summary is very similar to the Calculated Timesheet. The benefit of the Output Summary is that this report will show what was sent to UCPATH through Time and Attendance.

Why is this report helpful:

- This report will tell you the pay codes that were sent to UCPATH.
- This report will tell you the duration of time that was sent to UCPATH.
- This report will tell you will calculate overtime, holiday, and shift differentials.
- This report will tell you if there are any errors and the duration of said error.
- This report will tell you if the ‘ Do Not Pay’ box was selected at the time of payroll closing.



# Previously Asked Questions

- I would like to know if there is a report that will tell me if an employee selected COVID-19 Pay? **Using the Calculated Timesheet by Date Range New, there is a prepopulated filter that will only feed COVID-19 pay codes.**

Title	Shared	Published
By Department	<input type="checkbox"/>	<input checked="" type="checkbox"/>
By EID	<input type="checkbox"/>	<input checked="" type="checkbox"/>
By EID, Exceptions Only (Exempt)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
By EID, Hours Worked	<input type="checkbox"/>	<input checked="" type="checkbox"/>
By Holiday Hours	<input type="checkbox"/>	<input checked="" type="checkbox"/>
By Pay Codes (COVID-19)	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Title:

Description:

Shared  Published

**And**

[Period End Date](#) **Is between**  **And**

[Pay Codes](#) **Is any of** (  ,  ,  ,  ,  ,  ,  )



# Previously Asked Questions

- I would like to know if there is a report that will tell me if an employee had over a specific amount of hours over the last 12 months to determine FMLA eligibility? **Using the Output Summary Report UCPATH, there is a prepopulated filter that will only select 'Hours Worked' within a 12 month window for the entered employee.**

Title	Shared	Published
By EID	<input type="checkbox"/>	<input checked="" type="checkbox"/>
By EID no PPE	<input type="checkbox"/>	<input checked="" type="checkbox"/>
By Pay Period End Date	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Not in 181	<input type="checkbox"/>	<input checked="" type="checkbox"/>
REG hours only	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Title:

Description:

Shared  Published

**And**

[Pay Period End Date](#) **Is between** 8/1/2020 And 8/21/2021

[UCPath ID](#) **Begins with** <empty>

[Earn Code Id](#) **Equals** REG (Regular Pay)



# Questions?

- Do we need any approval to access these reports for our department? **If you have access as a supervisor or timekeeper, you can run reports within EcoTime.**
- Do primary and backup timekeepers have the same level of access to these reports? **Yes, they do.**
- Is there one single report that would show a list of employees and if a timesheet was not submitted/completed and timesheet detail for timesheets that were completed? **Currently no, however we have asked the vendor to make a reports like this to be available.**
- If running the covid 19 pay report during the current pay period, would that information show up in the report? **Yes, as long as the information has been placed in EcoTime. The only section that will not be available is UCPATH Output Summary.**
- Is there a report that will show us employee's who have the "No Pay" box checked, before time is submitted to UCPATH? **Yes, we currently have one that will tell you.**
- Can you do a demo on creating a new report? **Yes.**



# Questions?

- Do we have the ability to run a report to view leave accrual balances for the entire department? **Yes, we have an a report called 'Employee Balances'. That will share the employee has including Starting Balance, Earned Balance, Taken, Approved Leave and Available Balance.**
- What is the timeline for the vendor to create new reports? **Our timeline as approximately 2-3 months due to the business process (including testing) in place.**
- We've discovered a number of special problems in Ecotime for the Postdoc employee population. Can reports be filtered by Empl Class or Job Code so that we can look at Postdoc data only? **Yes.**
- Is there a report that shows employees that are maxed out on vacation? **Currently in production to be made.**
- Would you please show how to change the employee that is currently getting comp time and change it to comp time paid? **Currently in production to be made.**
- For "Email Name" does that field pull the campus email or the employee's preferred email? **Will follow-up with this question.**



# Questions?

- Can we promote any zoom meetings/trainings for this topic on Ecotime landing page? Sometimes we miss it in the midst of UCPATH announcements. **The issue with adding to the landing page is that everyone can view the landing page. We will need to find another way to capture more of our intended audience to attend these zoom meetings.**
- Or even a separate email to go out from Ecotime to all timekeepers and supervisors?  
<https://ucpath.ucsd.edu/transactors/index.html> Will also be shared on the weekly updates as well.
- I'm trying to run the Output summary in UCPATH and deleted the EMP ID & updated pay period end dates. It's just "Loading" and nothing is happening. I got an error "Callback request failed due to an internal server error." **Please schedule 1:1.**
- I went to the Employee Master File Record where I see the DO NOT PAY. Is this the same as the "NO PAY" selection by the employee that they select on their timesheet? I thought they were 2 different things? **'No Pay' pay code will show Timesheet Input Report will show the Leave- No Pay pay code.** Do Not Pay would be the selection the timekeeper makes, right? **Yes.** And no pay is a selection the empl can make for individual hours. **Yes.**
- What is the difference between "Adjustment Not Approved" "Unapproved Adjustments" in the Adjustment Status report? **There is no difference between 'Adjustment Not Approved' and 'Unapproved Adjustments'.**

