Ad Hoc Reporting Guide

Release 54, Service Pack 3
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About this Guide

This guide is for administrators, managers, and others who use the Reporting feature of Dayforce. The guide contains essential information about the feature and detailed instructions for how to use it.

Run a Keyword Search

You can search for words or phrases in this guide by pressing the Ctrl and F or Command and F keys together. This opens a search field where you can type the text that you want to find. The field looks like this in Acrobat Reader:

In Word, the same action opens a Navigation box:

Type a word or phrase and press the Enter key to navigate to the closest match in the document. You can keep pressing the Enter key to move through each instance.
As an example, say you want to learn more about the Favorites button of Dayforce. To do this, type the word "favorites" in the search field. Then, press the Enter key to move to the closest instance of the word "favorites" in the document.

Additional Resources

This guide explains how to use the Reporting feature and contains details about some of the data available in ad hoc reports. For more detailed information about the data that is available in Reporting, see the Reporting Reference Guide.

The entire documentation set is available for download in the Support Downloads > Admin & User Guides section of support.dayforce.com. If you do not have access to the support portal, please contact your organization’s Dayforce administrator.

You can also access help directly within the application by clicking the Help icon in the toolbar.

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Getting Started

The Reporting feature allows you to create customized reports according to your organization’s requirements. Each report is based on a topic that contains groups of related fields such as pay run or HR data.

The feature comes with a range of report templates that use data from other areas of the application to generate reports and present them in PDF, CSV, and Excel output formats. You can generate reports using the templates as they are, or you can edit the templates to create custom reports. You can also create new reports using the report designer tool.

In Reporting > Reports, you can work with the reports that you have access to, and you can use the report designer to edit reports and create new ones. The Reports tab displays the list of reports that you have access to, and you can run them or open them in the report designer to make changes. For more information, see Ad Hoc Reports on page 12. You can schedule your reports to run automatically on a regular schedule. In the Schedules tab, you can view and edit your scheduled reports and configure report distribution to send them to other employees in your organization at scheduled times. For more information, see Report Schedules and Distribution on page 49.

In Reporting > Topic Builder, you can create new topics that can be used to create new ad hoc reports. For more information, see Build Topics on page 65.
Ad Hoc Reports

In the Reporting > Reports feature, you can create and edit ad hoc reports, organize your custom reports, and create report schedules to generate reports on a schedule. You can find more information on the available functionality in the following sections:

- Reporting Landing Page
- Report Designer
- Report Categories
- Schedule Reports
- Distribute Reports

Reporting Landing Page

The landing page in Reporting > Reports contains a list of the ad hoc report library system templates and custom reports that you have access to. You can browse, filter, or search the report list to find the report that suits your needs. You can also preview reports before you run them to see a sample of the records that are returned by that report. The following sections explain how to navigate the list of reports to find, preview, and run an existing report.

- Find Reports
- Preview Reports
- Run Reports

Note: If you try to open a report that contains fields that you do not have permission to view, you will see an error message. If this occurs, contact your administrator.
Find Reports

You can find a report in the following ways: using the Global Search, searching the report list by keyword, browsing the report library, or using the Filter panel to filter the list. The following sections explain how to find a report using these methods.

Use Global Search to Find a Report

You can use the Global Search feature on the application’s Home screen to find a report. When there are reports in the search results, you can click a report name to view the report card. The report card displays details of the report and a preview of the data it generates, and it contains buttons that allow you to run the report or open it to make changes. Complete the following steps to find a report using Global Search:

1. Click the search icon in the Home screen.

2. Navigate to the Reports tab and enter keywords for the search. The application displays reports that you have access to that contain the keywords in the name or description.

   ![Search Page](image)

   payroll

3. Click the report name to view the report card. For more information, see View Report Cards on page 16.

Search the Report Library by Keyword

You can use the search field at the top of the landing page to find a report by name or by keyword. Enter your keywords and the application displays reports that contain those words in the report name or description.

For example, you need report on payroll information, so you enter payroll in the search field. The report filters the list to display reports that have payroll in their name or description:
Browse the Report Library

You can browse the entire report library on the landing page. Change the way the application displays the reports list by clicking the column headers to sort the list and by clicking the categories to view their contents.

Click the column headings and the application sorts the list by that column. When you sort by the first column, reports that you have identified as favorites are displayed first. For more information, see Identify Favorite Reports on page 18.

When you sort by the second column, the application sorts the list of reports by whether they are system templates or custom reports:

- The system template icon (твержда) indicates that a report is a system template. The templates come pre-configured in the Reporting feature.
- The custom report icon (твержда) indicates that a report is a custom report. These are reports that were created by you or another user in your organization.

To view reports on a certain topic, you can click a category name in the Categories panel. The application displays only the reports in that category:
Filter the Report Library List

Finally, you can use the filter panel on the landing page to filter the list of reports that the application displays. Click the Filter button to display the panel, and enter the values that you require for the filters. You can click Add Filter at the bottom of the panel to add more filter options:
View Report Cards

A report card provides a snapshot of a report that appears in the Global Search results, with sample data and information about the report. It also contains controls that allow you to run the report or open it in the report designer:
Note: Report cards are only displayed if the feature is enabled for your user role. For more information about access authorizations, refer to the "Access Authorizations Library" in the Dayforce Implementation Guide.

There are five tabs on the report card:

- **Details**: Contains information about the report such as the category, topic, topic type, created by, updated by, created date, and updated date.
- **Fields**: Displays the names and descriptions of all of the fields (columns) in the report.
- **Filters**: Contains the report filters and enter new values for the editable ones.
- **Preview**: Displays the first 25 results of the report, according to the filters that you have selected in the Filters tab.
- **Layout**: Displays the default layout for the report. You cannot edit the layout settings here; they can be changed when you run the report.

The report card displays a message at the top of the screen, "Preview displays a sample of the report using a limited set of data. To get the full results, use the Run button." You can click the close icon on the right side of the message to close it. The message is not displayed again until after you log out and log in again.

After you view the report card, you can use one of the following options to continue working with it:

- **Run Report**: Click the Run Report button to open the run report dialog box. For more information, see Run Reports on page 20.
- **Edit Report** or **Copy Report**: Click the Edit Report button (for custom reports) or the Copy Report button (for system templates) to open the report in a new tab in the report designer. For more information, see Edit Reports on page 24.
Identify Favorite Reports

You can designate reports as favorites to make them easier to find in the reports list. To designate a report as a favorite, click the bookmark icon next to that report in the list:

When you have designated a report as one of your favorites, the bookmark icon color is solid. When the report is not a favorite, the bookmark icon is cleared. Your favorite report settings are unique to you. Other users with access to the same reports as you can set their own favorites.

When you have some favorite reports, you can click the icon in the column header to sort by that column. Your favorites are displayed at the top of the list.

Preview Reports

You can preview a report before you run it to view a sample of the records that are returned by that report. A report preview provides a sample of the data that will be generated if you run the report. It does not usually contain the full set of data because the preview only displays the first 25 records in the report.

Complete the following steps to preview a report:

1. Select the report in the list at Reporting > Reports.
2. Click the Preview button. The application opens the preview in a new tab in the slide-out panel. The preview icon indicates that the tab contains a preview.
3. Navigate to the Preview tab to view the sample data.
4. If there are mandatory filters, enter values when prompted, and then click the Run Preview button. The application displays a data sample:
5. If the sample data represents the information that you need, you can click Run, Schedule, or Edit to continue working with the report.

The preview displays a message at the top of the screen, “Preview displays a sample of the report using a limited set of data. To get the full results, use the Run button.” You can click the close icon on the right side of the message to close it. The message is removed until after you log out and log in again.

There are five sub-tabs within the preview tab in the slide-out panel:

- **Details**: Contains information about the report such as the parent feature, category, topic, created by, updated by, created date, and updated date.
- **Fields**: Displays the names and descriptions of all of the fields (columns) in the report.
- **Filters**: Contains the report filters and enter new values for the editable ones.
- **Preview**: Displays the first 25 results of the report, according to the filters that you have selected in the Filters tab.
- **Layout**: Displays the default layout for the report. You cannot edit the layout settings in preview mode; they can be changed when you run or edit the report.
Run Reports

When you are ready to generate a report, you can run it from the landing page. Complete the following steps to run a report:

1. Select the required report in the reports list on the landing page.
2. Click the Run button. The application displays the run report dialog box.
3. Enter values for the filters and parameters of the report. Mandatory items are marked with a red asterisk.
4. Configure the following settings in the Output Options section:
   - **Report Header Display Name**: Optionally, enter an alternate title that will be displayed in the report header instead of the report name.
   - **Include filter criteria**: Select the checkbox and the filter values that you specify when you run the report are displayed in the report header.
   - **Only Include Unique Records**: Select the checkbox and the application includes only distinct records in the report output.
     
     **Note**: The application clears this option if you have it enabled and then add totals on the report. This option cannot be used together with totals because all records (not just unique ones) must be included to generate an accurate total. Consider an example with a SUM function where there are three records that all have the value of 40. With **Only include unique records** selected, only one of these records would be included in the sum and the total would be 40. With the checkbox cleared, the total is correct at 120.
   - **Max Number of Records**: Enter a number in this field to limit the maximum number of rows that are included in the report. You can include a maximum of 900,000 rows in a report.
   - **Output Format**: Select the file format that you require for the report output.
5. Configure the following settings in the Page & Format Options section:
   - **Excel Format** (these settings are enabled if you select an Excel format option in the Output Format drop-down list):
     - **Suppress formatting in Excel output**: Select this checkbox and the application removes all formatting from the report output, including headers, grouping information, and totals.
     - **Suppress formatting - Include Totals in Output**: Select this checkbox and the application removes all formatting in the output, but it still displays totals.
   - **PDF Format** (these settings are enabled if you select PDF for the output format):
     - **Orientation**: Specify whether the PDF output uses landscape or portrait orientation. The application fits PDF report output to one horizontal page, so landscape can be the better option for reports with a large number of columns.
     - **Paper Size**: Select a paper size in the drop-down list.
     - **Repeat column headers on each page**: Select this checkbox and the application includes the column headers on each page of the PDF output. By default, this checkbox is cleared, and the headers appear just once at the top of the report.
6. Click Run Report: The application generates the report according to the options you selected and delivers it to your Message Center inbox.
Report Designer

The report designer opens in a slide-out panel when you open a report to edit it and when you create a new report. The report designer contains the tools you need to edit reports; you can add and move fields, configure filtering, sorting, and grouping, and set default layout options for a report.

You can open multiple tabs if you need to work on more than one report at once:

The pencil icon (ロー) in the tab header indicates that the report designer is open in that tab. The preview icon in the tab header indicates that the report card is open in that tab.

You can minimize the report designer slide-out panel by clicking the arrow at the top left of the panel. Click the tab on the right side of the screen to slide it out again:

The following sections contain more information about how to use the tools in the report designer, including how to Create New Reports and how to Edit Reports.

Create New Reports

The report library contains a number of pre-configured report templates that you can run on an ad-hoc basis. For further flexibility, you can use the report designer to build custom reports that meet your organization’s needs.
The following sections describe two methods that you can use to create customized ad hoc reports:

- **Create New Reports from a Template**
- **Create New Reports**

**Create New Reports from a Template**

You can use the templates in the report library to create custom reports that match your organization’s specific reporting needs. To create a report based on a system template, first you need to locate the appropriate template in the reports list at **Reporting > Reports**. For more information, see **Find Reports** on page 13.

Complete the following steps to create a new report from a template:

1. Select the template that you want to base your report on.
2. Click the **Edit** button. The application opens a new tab of the report designer.
3. Enter filter values to preview the report data, or cancel the preview. For more information, see **Preview Reports** on page 18.
4. Edit the copy of the report template as required. For more information, see **Edit Reports** on page 24.
5. Click **Save As** to save the new report. You cannot edit system templates, so you must save your changes as a new report.

**Create New Reports**

You can use the report designer to create a new report based on one of the report topics. Follow these steps to create a new report:

1. Navigate to the **Reports** tab in **Reporting > Reports**.
2. Click the **New** button above the reports list.

The application displays the **Create New Report** dialog box.

3. Enter a name for your new report in the **Report Name** field.
4. Select the topic that you want to base your report on. You can use the following methods to choose a topic:
   - Select a topic from the alphabetical list if you know the name of the topic.
   - Click the topics in the list to browse for an appropriate one. When you click a topic, the application displays a list of the fields that it contains. These are the fields that will be available to include in your report. You can click the field names to view more information about the fields.
• Enter keywords in the search field and the application displays topics where either the topic name or a field in the topic contains the search terms.

In the following screenshot, the user needs to create a report that shows the amount paid to employees. She enters pay amount in the search field to view a list of topics that contain fields with those words. She selects the Pay topic and the application displays more information about the topic, including the fields that it contains. Then she selects the Pay Amount field to view more information about that field, including sample data that shows how the data will be displayed in the report column:

Note: The application displays the message “No sample available” in the Sample Data area if there is no data available for that field, or if you do not have the necessary access to view data for that field.

5. Click Create Report from Topic. The report designer opens with your new report in a new tab.
6. Add some fields and then click **Save** to save your new report. You must add at least one field to the report before you can save it. See the following sections for more information on adding fields.

After you create a new report, you can edit it using the controls in the report designer. The following sections contain more information about editing reports.

**Edit Reports**

You edit reports in the tabs of the report designer, which you can open in **Reporting > Reports**. The tab functionality allows you to open and work on more than one report at a time, and you can enable automatic previews to view sample data that is updated each time you make a change.

The application opens a new tab each time you open a report or create a new report. The tab header contains a pencil icon (✏️) to indicate that the tab is in edit mode. You can add fields and filters, specify group by and sort by on fields, add totals, and specify default layout settings.
When you open a report in the report designer, the application loads a preview of the report data. A message at the top of the screen reminds you that the data displayed is a limited sample. You can click the x to the right of the message to close it; the message is closed until after you log out and log in again.

If you don’t want to wait for the preview to load, you can skip loading the preview by clicking the **Click to Cancel** link:

The report designer allows you to update the preview as you make changes. Click the **Preview** button at any time to view a refreshed sample of records. After you make changes to the report, click **Preview** again to refresh the view. You can also click the arrow beside the **Preview** button to configure the following options:
• **Enable Auto-Preview**: Select this option and the application updates the sample display every time you make a change. When auto-preview is not enabled, you must click Preview to update the sample data.
• **Set Filter Values for Preview**: Click this option to adjust the way the data is filtered in the preview.

At any time while editing your report, you can click the **Refresh** button to revert your changes. When you click **Refresh**, the application reverts the report back to the last time you saved it. This includes removing filters, groupings, and totals that you added since the last save.

The following sections contain more information on the following actions that you can carry out in the report designer:

• **View and Edit Report Properties**
• **Add, Move, Edit, and Remove Fields**
• **Configure Grouping**
• **Configure Sorting**
• **Configure Filtering**
• **Configure Default Layout Settings**

**View and Edit Report Properties**

When you are working in the report designer, you can view and edit the report properties at any time. Click the **Properties** button to open the **Report Properties** dialog box. In this screen, you can view and edit the following details:

• **Report Name and Description**: These fields contain the name and description that you entered when you were creating the report. You can update them in this dialog box.
• **Category**: The report category that the report is filed under. If no category is selected, you can see the report in the list on the landing page by clicking **All Reports**. Click the **Change** button and select a new category to change it.
• **Report Integration Name**: Optionally, enter a unique value that will be used for Dayforce Web Services or OData to reference the report. For more information about configuring reports to use with OData, see the **OData Configuration Guide**.
• **Security**: You can grant users in your organization access to the report by selecting user roles in the **Available** list and using the arrow icons to move them into the **Selected** list.
• **Created By**: Displays the name of the user who created the report.
• **Created Date**: Displays the date on which the report was created.
• **Last Updated By**: Displays the name of the user who last updated the report.
• **Last Updated Date**: Displays the date that the report was last updated.

**Add, Move, Edit, and Remove Fields**

The **Field Selection** pane contains the fields that you can add to your report, grouped into query entities. Click the plus signs to expand the query entities and see the fields they contain. The icons next to the field names indicate the data types:
**Note:** The fields displayed in the report designer respect your access permissions. You do not see fields in the list if you don’t have access to view the data that they contain. Further, the list of fields displayed here might not be the same as the list displayed in **Topic Builder** because **Topic Builder** includes a larger list of fields, some of which do not apply to the report designer.

**Add Fields**

Fields appear as columns on your report output in the order that you arrange them in the report designer. Add one field at a time by double-clicking its name, or by dragging and dropping it to the required position on the report. The dotted line indicates where the column will be positioned if you drop it. The green arrow indicates that you can drop the field in that position.

To add multiple columns at once, select the checkboxes next to one or more fields, and then click **Insert**:
Move Fields

In the report output, columns are displayed in the order that you arrange them in the report designer. You can move a column by clicking and dragging it to a new position on the screen.

**Note:** Fields that have grouping applied must be positioned on the left-hand side of the report. You cannot place a grouped field to the right of a non-grouped field.

View and Edit Field Properties

Click a field name to view the field’s properties: data type, field name, access authorization, and description. You can change the name that is displayed as the column heading by entering a new name in the **Display Name** field and clicking **Apply**. In the following screenshot, the user updates the **Employee Name Number** field to be called “Employee”:
The new name appears in the report palette area:

Remove Fields

You can use the following methods to remove fields in the report designer:

- Click the x in the header of the column:

- Drag and drop the field back into the Field Selection panel:
• Click the field name to open its properties, and then click the **Remove Column** button:

Create Custom Fields

Users with advanced knowledge of logical operators and the SQL programming language can create custom report fields. Each custom field is a series of fields and functions combined in an SQL expression that evaluates when users run reports that include the custom field. These SQL expressions can use functions and aggregates, as well as arithmetic, logical, and comparison operators.
For a list of the functions and operators supported by custom fields, refer to the Custom Field Functions Library on page 35. More information on SQL functions and examples of how they work are available from several online sources, including [http://msdn.microsoft.com/en-us/library/ms174318.aspx](http://msdn.microsoft.com/en-us/library/ms174318.aspx).

You can include fields in your expression that are available in the topic that your report is based on. The application includes other custom fields in these options. For V1 topics, you can include other custom fields in your expressions. For V2 topics, other custom fields are displayed in gray and cannot be added to your expression. For more information, see Build Topics on page 65.

**Create Custom Fields**

In the report designer, create a new custom field by completing the following steps:

1. Click the **New** button in the **Field Selection** panel.
2. In the **Custom Field Editor** dialog box, enter a **Display Name** and **Description** for the field in the appropriate fields.
3. Select a **Data Type** in the drop-down list. You can select from the following data types:
   - **String**: Returns a text value (e.g., "Boole, George").
   - **Boolean**: Returns a true or false value.
   - **Integer**: Returns a whole number (e.g., 4).
   - **Decimal**: Returns a number with decimal precision (e.g., 4.12).
   - **Currency**: Returns a currency amount (e.g., $8.50).
   - **DateTime**: Returns a date and time (e.g., "9/29/2016 4:55:59 PM").
   - **Date**: Returns a date (e.g., "1/1/2016").
   - **Time**: Returns a time (e.g., "3:15:22 AM").

In the following screenshot, a custom field is configured with the field name **Average hours** and the **Decimal** data type.
4. To assign an access authorization to a custom field, select the necessary option from the **Access Authorization** drop-down list.

If you do not make a selection, the application does not associate the field with a particular access authorization, so any user who has access to the report also has access to the field. When an access authorization is selected, only users assigned this access authorization can view the data for that field.

For example, if you select **Employee Payroll Elections**, only users assigned this authorization would be able to view the field. If a user who does not have the Employee Payroll Elections access authorization assigned generates the report, the application hides the data by replacing it with "****".

**Note:** For more information about access authorizations, refer to the **Access Authorizations Library** in the *Dayforce Implementation Guide*.

5. Add fields and functions to the **Expression Editor** to create an expression that represents your custom field. You can double-click items in the **Fields** and **Functions** panels to add them, and you can also click the functions icons under the **Expression Editor** to add them quickly. Click a field or a function to view more information about it in the middle panel.
**Note:** Some field names that are inserted into the expression are different from the display names that are in the **Fields** panel. For this reason, it is best practice to select fields from the panel and insert them by double-clicking or clicking **Insert** rather than typing them directly into the **Expression Editor**.

In the previous screenshot, the Average Hours custom field is configured to return the average of employee hours.

**Important:** Do not group custom fields that contain mathematical functions (e.g., SUM) as the resulting group by values will not be accurate.

6. Click the **Validate** button and the application validates your expression.
7. Click the **Apply** button to save your expression. Your new custom field is added as a column on your report.
8. Click **Save** to save the custom field.

**Note:** If you close the report without clicking **Save**, the application discards your custom field.

**Example Report with Custom Field**

The following example demonstrates the configuration of a report that features a custom field that returns the number of days off in employees' vacation amounts. For the purpose of this example, the Employee Vacation Amounts report has been created based on the Time Away From Work report topic. So far, it includes the **Display Name**, **Pay Code**, **Start Date Time**, **End Date Time**, and **Hours** fields. For more information, see **Create New Reports** on page 21.

The instructions below explain how to add a new custom field called **Number of Days Off** to the report.

1. Click the **New** button. The application displays the **Custom Field Editor**.
2. Enter "Number of Days Off" as the **Display Name** and a short **Description**.
3. Select "Integer" in the **Data Type** drop-down list so that the data is returned as a whole number.
4. Use the **DATEDIFF** function to create the expression. "DATEDIFF" is an SQL function that returns the count of the specified "datepart" boundaries crossed between the specified "startdate" and "enddate". It uses the following syntax:

   ```sql
   DATEDIFF( datepart , startdate, enddate )
   ```
Note: For more information, see Functions on page 36. More information about the “DATEDIFF” SQL function is available online from Microsoft, at http://technet.microsoft.com/en-us/library/ms189794.aspx

5. Specify "nn" as the "datepart" so that the application calculates the difference in days.
6. Insert the Start Date Time field as the "startdate", and the Start End Time field as the "enddate". The following screenshot shows the Custom Field Editor with the necessary expression:

   ![Custom Field Editor](image)

   **Expression**: DATEDIFF(dd, TimeStart, TimeEnd)

7. Click Validate to check your expression. If your entry is not valid, the application displays an error message that explains where the error occurred.
8. When your expression is successfully validated, click Apply to add it to your report. The application displays the report designer with your new custom field to the right of all of the other fields on the report, as shown in the screenshot below. You can click and drag it to the desired position.
Custom Field Functions Library

This section describes the functions supported by the Custom Field Editor in Reporting > Reports, when users build their own custom fields.

Aggregates

The Custom Field Editor supports the use of the following aggregates in custom fields:

- Avg()
- Count()
- Max()
- Min()
- Sum()
- Round()

Arithmetic Operators

The Custom Field Editor supports the use of the following arithmetic operators in custom fields:

- + (add)
- - (subtract)
- / (divide)
- % (modulo)
- * (multiply)
Comparison Operators

The **Custom Field Editor** supports the use of the following comparison operators in custom fields:

- `=` (equals)
- `>` (greater than)
- `<` (less than)
- `>=` (greater than or equal to)
- `<=` (less than or equal to)
- `<>` (not equal to)
- `!=` (not equal to)
- `!<` (not less than)
- `!>` (not greater than)

Logical Operators

The **Custom Field Editor** supports the use of the following logical operators in custom fields:

- And
- Or
- Not
- Between
- In
- Like
- Any
- All
- Some
- Exists

Functions

The **Custom Field Editor** supports the use of the following functions in custom fields:

- **Case**: Used to provide ‘if, then, else’ logic.
- **Cast**: Used to convert one data type into another when needed.
- **Convert**: Similar to cast; used to convert one data type into another.
- **Current_timestamp**: Returns the current date.
- **DateAdd**: Used to add an interval to a date.
- **DateDiff**: Used to calculate the difference between two dates.
- **DateName**: Returns the name of the specified **DatePart** of the specified date.
- **DatePart**: Used to extract a specific part of a date or time value (Day, Month, Year).
- **GetDate()**: Returns the current system time.
- **IsDate**: Returns 1 if the expression is a valid date, time, or date time value; otherwise, returns 0.
- **Left**: Used in joins.
- **Len**: Used to get the length of a string.
- **Lower**: Converts uppercase character data to lowercase.
Configure Grouping

The grouping function allows you to group the records in your report by one or more of the fields. The fields that have grouping applied are displayed on the left-most side of the report. When you apply grouping, the application automatically moves the grouped column to the left, followed by any other nested grouped fields.

**Note:** Fields configured with totals cannot be grouped. The Group By checkbox is disabled on any fields that have totals applied. Similarly, fields with grouping applied cannot have functions applied in the Totals dialog box.

Complete the following steps to apply grouping on a report:

1. Click the **Grouping** button.

2. In the **Grouping** dialog box, select the checkbox next to any fields that you want to group by. In the following example, the user applies grouping to the **Display Name** and **Department** fields.
3. Optionally, use the **Move Down** and **Move Up** buttons to change the order of the grouped columns. In this example, the user selects the Department field and clicks **Move Up**. The report records will now be sorted first by Department and then by Display Name.

4. Click the **Apply** button. The dialog box closes. If auto-preview is enabled, the sample data is updated automatically, and fields with grouping applied are displayed in a darker shade of gray.

5. If auto-preview is not enabled, click the **Preview** button to update the sample data.

6. Click the **Save** button when you are satisfied with the changes.

### Configure Sorting

You can sort the records that the report returns by one or more columns. Columns that have grouping applied must also be sorted, and by default they are automatically sorted in ascending order. For grouped columns, you can reverse the sort order, but you can’t remove the sorting.

To apply sorting on your report, complete the following steps:

1. Click the **Sorting** button to open the **Sorting** dialog box.

2. Click the **Add** button to add another column to sort by.

3. Click on **Please select a field**, and then select a field in the drop-down list.

4. Make a selection in the **Sort Order** drop-down list. The options available depend on the data type of the column: A to Z for strings, Smallest to Largest for numbers, and Oldest to Newest for dates.

5. Optionally, add more fields to sort by.

6. Optionally, adjust the order that the fields will be sorted in by select a field and clicking the **Move Down** or **Move Up** button.
Note: Grouped fields must always be at the top of the list. You can change the order of grouped fields in the Grouping dialog box. For more information, see Configure Grouping on page 37.

7. Click the Apply button. The dialog box closes. If auto-preview is enabled, the sample data is updated with the changes automatically. Fields that have sorting applied are now displayed in a darker shade of gray.

8. If auto-preview is not enabled, click Preview to update the data sample. Click Save when you are satisfied with the changes.

Configure Filtering

Reports can contain filters and parameters that define which data is returned in the report output. If the filters and parameters are editable, users can define values for them when they run and preview reports:

Filters

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>1/13/2017</td>
</tr>
<tr>
<td>End Date</td>
<td></td>
</tr>
<tr>
<td>And Ben Plan Employee Elected Option Is Dele... Equal</td>
<td>False</td>
</tr>
<tr>
<td>And Employee Elected Option Change Date Greater Than Equal</td>
<td>@StartDate</td>
</tr>
<tr>
<td>And Employee Elected Option Change Date Less Than Equal</td>
<td>@EndDate</td>
</tr>
<tr>
<td>And Employee Name In</td>
<td></td>
</tr>
</tbody>
</table>

In the run and preview report dialog boxes, the topic-level parameters and filters are shown in gray, while the report-level filters are shown in black, as in the screenshot above. You can configure new report-level filters in the report designer in the Filters and Parameters dialog box, which you open by clicking the Filtering button. In this dialog box, you can also configure default values for the topic-level parameters.

A number in the green circle next to the Filtering button (filtering) indicates how many filters are configured on the report. Further, a green funnel icon is displayed in the column header for fields that have filters applied (Total Earnings). The number beside the Filtering button might be larger than the number of fields that have the green funnel icon because you can filter by fields that are not included as columns in the report.

Add New Filters

Complete the following steps in the report designer to add a new report-level filter to a report:

1. Click the Filtering button. The application displays the Filters and Parameters dialog box.
2. In the Filters tab, click the Add button.
3. Configure the following options for the new filter:
• **And/Or**: Specify whether the application should use the **And** or **Or** operator to join the new filter to the one above. All of the filters with **And** selected must be met for the record to be included. Any of the filters that are included with **Or** selected must be met for the record to be included.

• **Field**: In the drop-down list, select the field you want to filter on. Fields are listed with the name of the query entity so that you can identify which field you need to add if there are two with similar names.

• **Operator**: Select an operator in the drop-down list. The available operators depend on the data type of the field. For more information on operators that can be used with fields of different data types, see [Filter Operators](#) on page 41.

• **Value**: Optionally, enter a default value for the filter.

• **Compare to Field**: Optionally, select a field to compare to for the filter. For example, if you want to include only records where the value in the **Base Rate** field is greater than the **Average Rate** field, you would create a filter on the base rate field with the greater than operator and **Average Rate** option selected in the **Compare to Field** column.

• **Editable**: Select the checkbox and users can edit the filter value when they run the report.

• **Required**: Select the checkbox and users must enter a filter value when they run the report.

4. Optionally, group multiple filters. Click and hold the CTRL key to select more than one filter, then click the **Group** button to group them.

5. Click the **Apply** button to close the dialog box and apply the filter. If auto-preview is enable, the sample data is updated automatically.

6. If auto-preview is not enabled, click the **Preview** button to update the display.

7. Click **Save** to save the new filters.

In the following example, the user has added filters on two fields: **Pay Amount**, and **Business Date**. **Pay Amount** must be larger than 0, and the value is not editable. When users run the report, it will always exclude records where the pay amount is 0 or less. The **Business Date** is required, so users must enter a value to run the report.

---

Configure Default Parameter Values

Parameters are configured at the topic level, and they define which data is generated in a report output. Users can enter values for topic-level parameters when they run or preview reports. You can add new parameters to filters in [Topic Builder](#); For more information, see [Build Topics](#) on page 65.
In the report designer, you can configure default values for parameters in the Filters and Parameters dialog box. Complete the following steps to configure a default parameter value:

1. Click the Filtering button.
2. In the Filters and Parameters dialog box, navigate to the Parameters tab.
3. Enter the default values for the parameters in the Value column.
4. Select the Editable checkbox next to a parameter to allow users to edit the value when they run the report.
5. Select the Required checkbox next to a parameter and users must enter a value in order to run the report.

Filter Operators

The available filter operators are different depending on the data type of the field. Any field can be filtered using the Empty or Not Empty operation. These filter records based on whether the field contains a value.

The following sections contain more information on the other available operators for each data type.

Alphanumeric (string entry in a text box)

The following operators are available for alphanumeric fields that are a string entry in a text box such as Account Number or Badge:

- Contains
- Does Not Contain
- Starts With
- Ends With

Alphanumeric (selection from a list)

The following operators are available for alphanumeric fields that involve selection from a list such as Department or Employee:

- Equal To
- Not Equal To
- Includes
- Excludes
- In
- Not In

Date/Time

With date/time fields, earlier dates are considered “less than” the specified date, and later dates are considered “greater than” the specified date. The following operators are available for date/time fields such as Hire Date or Business Date:

- Equal To
- Not Equal To
• Greater Than
• Great Than or Equal To
• Less Than or Equal To
• Within

Some topics support filtering on relative date values for past and future dates. A relative date value is a date or a date range that is relative to the day the report is being run, such as Yesterday, Last Complete Week, Next N Complete Days Including Today.

**Note:** For topic-level parameters, relative dates are only available for some topics. If the report you are configuring is based on a relative date topic, choose WITHIN in the **Operator** column, and then select one of the relative dates. Alternatively, select BETWEEN to enter a from and to date, and AS OF DATE to enter a specific date as of which to generate records.

You can select the following relative date values along with the **WITHIN** operator:

• Today
• Yesterday
• Last 30 Days Including Today
• Last 60 Days Including Today
• Last 90 Days Including Today
• This Calendar Week (Sun-Sat)
• Last Complete Calendar Week
• This Calendar Month
• Last Complete Calendar Month
• Calendar Month to Date
• This Calendar Quarter
• Last Complete Calendar Quarter
• Calendar Quarter to Date
• This Calendar Year
• Last Complete Calendar Year
• Calendar Year to Date
• Last N Days Including Today
• Last N Complete Weeks (Sun-Sat)
• Last N Complete Months
• Last N Complete Quarters
• Last N Complete Years
• This Fiscal Week
  **Note:** The options to filter based on fiscal values, for example **This Fiscal Week**, are only displayed if your organization has a fiscal calendar configured in **Plan Setup > Fiscal Calendar**.
  • Last Complete Fiscal Week
  • This Fiscal Month
  • Last Compete Fiscal Month
  • Fiscal Month to Date
  • This Fiscal Quarter
  • Last Complete Fiscal Quarter
  • Fiscal Quarter to Date
• This Fiscal Year
• Last Complete Fiscal Year
• Fiscal Year to Date

You can select the following future relative date values along with the WITHIN operator:

• Tomorrow
• Next 30 Days Including Today
• Next 60 Days Including Today
• Next 90 Days Including Today
• Next Complete Calendar Week
• Next Complete Calendar Month
• Next Complete Calendar Quarter
• Next Complete Calendar Year
• Next N Complete Days Including Today
• Next N Complete Weeks (Sun-Sat)
• Next N Complete Months
• Next N Complete Quarters
• Next N Complete Years
• Next Complete Fiscal Week
• Next Complete Fiscal Month
• Next Complete Fiscal Quarter
• Next Complete Fiscal Year

**Numeric**

The following operators are available for numeric fields such as Rate or Hours:

• Equal To
• Not Equal To
• Greater Than
• Less Than
• Greater Than or Equal To
• Between
• Not Between

**Boolean**

The following operators are available for Boolean (yes/no or true/false) fields such as Is Primary:

• Equal To
• Not Equal To

For Boolean filters, specify True to filter on checkboxes that are selected, or False to filter on checkboxes that are cleared.
Include Totals

There are two types of totals that you can add to reports: column totals and summary totals. Column totals can be added to any column that is included in the report, and they appear within the body of the report itself. Summary totals can be added for any field that the report topic includes, and they appear outside of the main body of the report, at the top or at the bottom. Moreover, for both column and summary totals, you can create a custom expression to calculate a total.

The following sections describe each of the total types and explain how to add them to your report.

Column Totals

Column totals are included in the body of data in your report output. If you have grouped data, you can include totals with each grouping, but it is not necessary to have grouping in order to include column totals. You can configure them to be included at the top or at the bottom of the columns or groupings.

To add column totals to your report, click the Totals button in the report designer and navigate to the Column Totals tab of the dialog box. You can configure the following settings for column totals:

- **Fields**: You can add column totals to any fields that are included in the report.
- **Function**: Select one of the pre-defined functions from the list, or select Custom to create a custom expression to calculate a total. For more information, see Custom Totals on page 47.
- **Display Totals**: Specify whether the totals are included at the top or the bottom of your report data.
- **Add Column Totals to grouped data**: Select the checkbox to display totals with the grouping information.
- **Show only totals**: Select this option to generate a report output that contains only the totals. Individual records are hidden. The following screenshot shows an example of a report with this option enabled. The data is grouped by Department, so there is a total displayed for each department. Without the grouping, the report would only contain the top "Totals" line.
Summary Totals

Summary totals are included in a table either before or after the body of your report, separate from the report data. You can add summary totals for any fields in the topic that the report is based on. You can also add summary totals to grouped columns if you have grouping applied.

To add summary totals to your report, complete the following steps:

1. Click the Totals button in the report designer.
2. Navigate to the Summary Totals tab.
3. Click the arrow next to the Add button and select Total or Custom Total. Total allows you to add a summary total to any field in your report’s topic. Custom Total allows you to build a custom expression to calculate your total. You can configure the following settings for summary totals:
   4. Configure the following settings:
      - Fields: Select the field to add totals to in the drop-down list. You can add summary totals for any field from the report topic, even if it is not one of the report columns.
      - Function: Select one of the predefined functions from the list, or select Custom to create a custom expression to calculate a total. For more information, see Custom Totals on page 47.

In the following example, a payroll administrator is adding two summary totals: a sum of the Pay Amount column, and an average of the Rate column.
• **Display Totals**: Specify whether the totals are included at the top or the bottom of your data.

• **Display Order**: You can specify the order to display the summary totals by selecting the line and clicking **Move Down** or **Move Up**, as required.

• **Add Summary Totals to grouped data**: Select the checkbox to include summary totals with the grouping information.

In the following example, the data is grouped by **Department**, and summary totals are added to the grouped column. The top, darker section contains the summary totals for the whole report, and the second, lighter section, shows the summary totals for the "Account Executives" department. If you didn't select this checkbox, the totals would not be included for each department, but only in the grand total area at the top of the report.
Custom Totals

Before You Begin: You need knowledge of logical operators and the SQL programming language to create custom totals.

In both column totals and summary totals, you can create a custom total that is based on an expression that you build. When you are creating a total, select Custom in the Function column and the application displays the Custom Field Editor dialog box. The Custom Field Editor opens, and you can build your expression to create a custom total. For more information about using the Custom Field Editor, see Create Custom Fields.

Note: When you create a custom field for a total, you must include at least one math function in the expression (sum, count, max, min, or average).
Configure Default Layout Settings

In the Layout dialog box, you can configure the default layout settings for the report output. The settings you configure here are defaults, and users can adjust them as required when they run reports.

Click the Layout button to display the default layout settings, and configure the following options:

Output Options

- **Report Header Display Name**: Enter an alternate title that will be displayed in the report header instead of the report name.
- **Include filter criteria**: Select the checkbox and the filter values that you specify when you run the report are displayed in the report header:

  - **Only include unique records**: Select the checkbox and the application returns only unique records in the report output. By default, reports display all database records according to the report filters and parameters, even if all fields contain identical data in more than one record.
  
  **Note**: This option cannot be used together with totals because all records (not just unique ones) must be included to generate an accurate total. The application clears this option if you have it enabled and then add totals on the report. Consider an example with a SUM function where there are three records that all have the value of 40. With **Only include unique records** selected, only one of these records would be included in the sum and the total would be 40. With the checkbox cleared, the total is correct at 120.

- **Max Number of Records**: Enter a new value for the maximum number of rows in the report. Reports are limited to 5,000 rows by default, and the maximum possible is 900,000.

- **Output Format**: Select the file format that you require for the report output.

Page & Format Options

The following Excel format options are enabled if you select Excel as the output format:

- **Suppress formatting in Excel output**: Select this checkbox and the application removes all formatting from the report output, including headers, grouping information, and totals.
- **Suppress formatting - Include Totals in Output**: Select this checkbox and the application removes all formatting in the output, but it still displays totals.
The following PDF format options are enabled if you select PDF as the output format:

- **PDF Orientation**: Specify whether the PDF output uses landscape or portrait orientation. The application fits PDF report output to one horizontal page, so landscape can be the better option for reports with a large number of columns.
- **Paper Size**: Select a paper size from the drop-down list.
- **Repeat column headers on each page**: Select this checkbox and the application includes the column headers at the top of each page of the PDF output. By default, this checkbox is cleared, and the headers appear just once at the top of the report.
- **Insert page break between first-level groups**: Select this checkbox and the application inserts a page break between each group at the first grouping level. For example, if your report records are grouped by department and then by manager, each new department begins on a new page in the report output. A page break is not inserted between the manager groupings.
- **Support for double-sided printing**: Select this checkbox and the application inserts a blank page if a new group after a page break starts on an even-numbered page. This setting ensures that a new first-level group doesn’t start on the back page if you are printing double sided. This checkbox is only enabled if Insert page break between first-level groups is selected.

Delete Reports

Administrators can delete custom reports that were created by any user, while other users can only delete custom reports that they created. System templates cannot be deleted.

Complete the following steps to delete a custom report:

1. Select the report you want to delete in the reports list.
2. Select **Edit** or **Preview**.
3. Click the **Delete** button to remove the report.

The application deletes the report and any report schedules associated with it.

Report Schedules and Distribution

You can create a scheduled report so that the application generates the report at scheduled times. You can schedule reports so that the application generates them at specified times and delivers to your Message Center. For example, if you need to review an employee attendance report on a weekly basis, you could schedule it to generate automatically every week on a specific day and time.

At the scheduled times, the application generates the report and sends it to your Message Center. If you selected other recipients in the **Distribution** tab, they will also receive a copy of the report in the Message Center, and a notification email if they have an email address in their profile.
**Note:** If a scheduled report fails to run, the application will make a second attempt to generate it. If this second attempt is successful, you might see two copies of the report in the Message Center.

**Schedule Reports**

**Before You Begin:** You can only schedule custom reports. To schedule a system report, first save a copy of it, and then use the copy to create the schedule.

To schedule a report to run at a specific time from **Reporting > Reports**, complete the following steps:

1. Select a report from the reports list and then click the **Schedule** button. The **Schedule Report** dialog box opens.
2. In the **General** tab, fill in the following fields:
   - **Schedule Name:** Enter the name of the schedule.
   - **Description:** Enter a description for the schedule.
   - **Start Date:** Select the first date on which you would like to generate the report.
   - **End Date:** Select the last date on which you would like to generate the report. You can leave this field blank to continue running the report schedule indefinitely.
   - **Task Recurrence:** Select the time intervals (Monthly, Weekly, or Daily) at which the report will be generated.
   - **Recurrence:** (Not displayed for daily report schedules) Select the frequency at which the report will be generated. The options in this drop-down list depend on the option you selected for **Task Recurrence**. For example, if you selected **Monthly**, you will see **Every month, Every 2 months**, and so on. If you selected **Weekly**, you will see **Every week, Every 2 weeks**, and so on.
   - **Day:** (Not displayed for daily report schedules) Select the day of the month for monthly schedules, or the day of the week for weekly schedules. The application will generate the report on this day at the frequency you selected.
   - **Start Time:** Enter the time the report should run.
      - **Note:** The application runs reports at the selected time in the time zone that is displayed next to the **Start Time** field. An administrator can configure your organization’s preferred time zone in the **General Properties** tab in **System Admin > Client Properties**. For more information, see “Configure Client Properties” in the **Dayforce Implementation Guide**.
   - **Enabled:** Make sure that the **Enabled** switch is set to on. You can click the switch to toggle between enabled and not enabled. By default, a new report schedule is enabled when you create it. When the switch is blue with a white checkmark, the schedule is enabled. When it is grayed out, it is not enabled and the report will not be generated.
3. In the **Distribution** tab, select user roles and individual employees that you want to send the report to. For more information on configuring report distribution, see **Distribute Reports** on page 54.

4. In the **Filters** tab, enter the filter values that you want to use when generating the report.

5. In the **Options** tab, configure the following display and notification options:
   - **Report Header Display Name**: Optionally, enter an alternate title that will be displayed in the report header instead of the report name.
   - **Include filter criteria**: Select the checkbox and the filter values that you specify when you run the report are displayed in the report header.
   - **Only include unique records**: Select the checkbox and the application includes only distinct records in the report output.

   **Note**: The application clears this option if you have it enabled and then add totals on the report. This option cannot be used together with totals because all records (not just unique ones) must be included to generate an accurate total. Consider an example with a SUM function where there are three records that all have the value of 40. With **Only include unique records** selected, only one of these records would be included in the sum and the total would be 40. With the checkbox cleared, the total is correct at 120.
• **Max Number of Records**: Enter a number in this field to limit the maximum number of rows that are included in the report. You can include a maximum of 900,000 rows in a report.

• **Send a notification if the report is empty**: Select this checkbox and the application sends a notification message to the recipients if the application generates an empty report. The checkbox is cleared by default, and the application doesn’t send a notification if the report is generated with no results. The application never delivers a blank report to the **Message Center**.

• **Output Format**: Select the file format that you require for the report output.

• **Suppress Formatting in Excel output**: (Available if you select Excel for the output format) Select this checkbox and the application removes all formatting from the report output, including headers, grouping information, and totals.

• **Suppress formatting - Include Totals in Output**: (Available if you select Excel for the output format) Select this checkbox and the application removes all formatting in the output, but it still displays totals.

• **PDF Orientation**: (Available if you select PDF for the output format) Specify whether the PDF output uses landscape or portrait orientation. The application fits PDF report output to one horizontal page, so landscape can be the better option for reports with a large number of columns.

• **PDF Paper Size**: (Available if you select PDF for the output format) Select a paper size in the drop-down list.

• **Repeat column headers on each page**: Select this checkbox and the application includes the column headers on each page of the PDF output. By default, this checkbox is cleared, and the headers appear just once at the top of the report.

6. Click **OK**.
7. You can view your generated scheduled reports in the **Message Center**.

At the scheduled times, the application generates the report and sends it to your **Message Center**. If you selected other recipients in the **Distribution** tab, they will also receive a copy of the report in the **Message Center**, and a notification email if they have an email address in their profile.

**Note**: If a scheduled report fails to run, the application will make a second attempt to generate it. If this second attempt is successful, you might see two copies of the report in the **Message Center**.

### Manage Scheduled Reports

You can view and manage your scheduled reports in the **Schedules** tab of **Reporting > Reports**. When you navigate to this tab, you will see a list of all of your report schedules. The list allows you to see details of your report schedules at a glance:
If the schedule is configured to be distributed to other recipients, the **Report Distribution** column contains a checkmark. The **Schedule Enabled** column contains a checkmark if the **Enabled** switch is toggled to on for that schedule.

You can double-click one of the schedules to open the **Schedule Report** dialog box, where you can view more details and update them if required. For more information, see **Schedule Reports** on page 50.

You can filter the list by clicking the **Filter** button and entering filter terms into the **Name**, **Description**, **Report Name**, and **Report Description** fields:

In certain situations, a scheduled report might become disabled. This can happen, for example, if a change in the report's topic or query entities affects how the report functions. When a scheduled report becomes disabled, you receive a notification in your **Message Center**. In most cases, you can re-enable the scheduled report by taking these steps:

1. Navigate to **Reporting > Reports**, and then to the **Scheduled Reports** tab.
2. Double-click the schedule in the list to open the **Schedule Report** dialog box.
3. In the **General** tab, click the **Enabled** switch:

   ![Scheduled Report Enabled Switch](image)

4. Click the **OK** button.
When the scheduled report is enabled again, the **Schedule Enabled** column in the **Schedules** tab will contain a checkmark.

**Distribute Reports**

You can configure reports to be distributed to other employees in your organization at scheduled times. The application generates the distributed reports and delivers the report output file to the recipients’ **Message Center** at the scheduled times. Recipients who have an email address in their profile can also receive email notifications.

Report distribution is mostly configured in the **Distribution** tab of the **Schedule Report** dialog box in **Reporting > Reports**. You can set up distribution when you first schedule a report in the **Reports** tab, or you can add it later in the **Schedules** tab on reports that have already been scheduled.

To configure distribution of a report, complete the following steps:

**Before You Begin:** This procedure assumes that you have already configured the time and frequency for the report schedule. For more information on setting up a report schedule, see **Schedule Reports** on page 50.

1. Open the **Schedule Report** dialog box by doing one of the following:
   - If the report you want to distribute has already been scheduled, navigate to the **Schedules** tab of **Reporting > Reports** and double-click the row of the report schedule.
   - If the report hasn’t already been scheduled, select the report in the **Reports** tab of **Reporting > Reports** and click the **Schedule** button.
2. In the **General** tab of the dialog box, confirm the details of the schedule. For more information about the settings in this tab, see **Schedule Reports** on page 50.
3. In the **Distribution** tab, do one of the following:
   - To distribute the report to employees by their user roles, select one or more roles in the **AVAILABLE** list and use the arrows to move them to the **SELECTED** list:
The application distributes the report to all employees who are assigned that role.

- To distribute to individual employees, select the recipients in the Employees section. You can type names in the field, select employees in the drop-down list, or click the To button and use the employee picker to select one or more employees:
Note: By default, there is a maximum of 1,000 recipients for each distributed report.

4. Clear the **Include myself as a recipient** checkbox if you do not want to receive a copy of the report. By default, this checkbox is selected, and the application sends a copy of the report to you as well as the recipients.

5. In the **Options** tab, select the **Send a notification if the report is empty** checkbox and the application sends a notification message to the recipients if the application generates an empty report. The checkbox is cleared by default, and the application doesn’t send a notification if the report is generated with no results. The application never delivers a blank report to the **Message Center**.

At the scheduled time, the application generates the report and distributes it to the **Message Center** of the selected recipients. The report is deleted after seven days. Recipients also receive a notification email if they have an email address in their profile.

**Note:** The reports are distributed at the scheduled time in your organization’s preferred time zone as configured in the **General Properties** tab in **System Admin > Client Properties**. The application displays your organization’s preferred time zone next to the **Time** field in the **General** tab.
Manage Distributed Reports

You can view at a glance which of you report schedules have distribution configured. In the Schedules tab of Reporting > Reports, the Report Distribution contains a checkmark next to any reports that are being distributed:

![Report Distribution Table]

Notes About Report Distribution

Your organization can have a maximum of 25 reports configured for distribution each day. If your organization already has 25 distributed reports, the application displays a message when you navigate to the Distribution tab in the Schedule Report dialog box. If you need to distribute more reports on that day, you should remove some other distributed reports that are scheduled for the same day.

Some reports are not suitable for distribution. If this is the case, the application displays a message, in the Distribution tab in the Schedule Report dialog box. Distribution compatibility will be added in a future release.

Reports that are flagged for distribution can only be edited by the distributor, even if other users have access to the report.

Receive Distributed Reports

The application delivers distributed reports into the recipients' Message Center. Recipients can complete the following steps to download the report file:

1. Click the message icon in the toolbar of the application to open the Message Center.

![Message Center Icon]

2. (Optional) Click Reports on the left side of the screen to display on reports messages.

3. Select the report that you want to open.

The application begins the download of the file. You can open it with a selected program or save it to a location on your machine.

Recipients who have an email address configured in Profile & Settings also receive an email notification. For users with single sign-on (SSO) accounts, the email notification contains a link that navigates directly to the report download. If you click the download link and you are already logged in to the application, the download begins right away. If you are not logged in to the application, the link navigates you to the login page, and the download begins when you log in.
For users with non-SSO accounts, the email contains instructions that explain how to log in and download the report from the Message Center.

**Note:** Report distribution notifications must be enabled to send notification emails to recipients. For more information, see Enable Report Distribution on page 58.

**Report Distribution Notifications**

Recipients always receive distributed reports in Message Center. Recipients can also receive email notifications if they have the Report Distribution notification type enabled in Profile & Settings. The following sections explain the situations in which users receive email notifications.

**Recipient Notification Emails**

Distributed report recipients receive notification emails in the following situations:

- When a report is created and distributed, recipients with an email address in their profile receive an email notification. Users with single sign-on (SSO) accounts receive an email with a link that takes them directly to the report download. Users without non-SSO accounts receive an email with instructions to log in and navigate to Message Center.
- By default, recipients don't receive a notification email when a report doesn't generate any results. You can select the Send a notification if the report is empty checkbox in the Options tab of the Schedule Report dialog box for a distributed report to send a notification if the report doesn't generate any results.

**Distributor Notification Emails**

Report distributors receive notification emails in the following situations:

- If a report recipient cannot receive the report due to access authorization restrictions on the data filters in the report.
- If a report schedule has been disabled.
- If a report schedule has failed to run.

**Enable Report Distribution**

This section contains instructions for enabling the report distribution feature. An administrator should enable the Distribution role feature for users who are going to create and distribute reports. Users can optionally enable report distribution notification emails in Profile & Settings.

**Enable Distribution Feature in Reporting > Reports**

You should enable the Scheduled Reports > Distribution role feature in the Features tab in System Admin > Roles for users who need to create and distribute reports. Note that users who are going to receive reports do not need this feature enabled.
Enable Report Distribution Notifications

Recipients who want to receive distribution notifications need to enable the Report Distribution notification type in Profile & Settings. Complete the following steps to enable report distribution notification emails:

1. In the application, navigate to Profile & Settings:

2. Navigate to the Notifications tab:

3. Select the checkbox in the Email column for the Report Distribution option.
Now the user will receive the email notifications listed in the **Report Distribution Notifications** section.

## Report Categories

The **Categories** panel in **Reporting > Reports** displays the report categories that you have access to. The report library comes sorted into a number of system categories, and administrators and other users of **Reports** can create their own custom categories. System categories are mapped to other screens in the application, and users can access the reports in the system categories in the **Reports** dialog box of the corresponding features. Custom categories are not mapped to other screens, but you can use them to share groups of reports with other users who have access to **Reporting > Reports**.

The following sections contain more information about how to use categories to organize and share reports with other users in your organization:

- **Move Reports into Categories**
- **Create and Modify Custom Categories**
- **Use Categories to Share Reports**

### Move Reports into Categories

You can move custom reports into both system categories and custom categories. System categories are mapped to other feature areas of the application, and users can access the reports in the corresponding features. Custom categories can be shared with other users who have access to **Reporting > Reports**.

You can move custom reports into other categories by clicking and dragging them:
Each category has a number next to it that indicates how many reports it contains. Reports can only be in one category at a time. If you need to include a report in more than one category, you can create and save a copy of the report and then move the copy into the second category. Further, system reports are fixed in their categories and cannot be moved. If you need to place a system report into another category, you can create and save a copy of the report and move the copy into the other category.

Create and Modify Custom Categories

You can create and modify custom categories in Reporting > Reports to sort your custom reports. Categories help you to browse through your reports, and they also help you to create groups of reports that can be shared with other users in your organization who have access to Reports.

The following sections contain more information about how to create and modify custom categories.

Create New Custom Categories

You can create new custom categories and sort your custom reports into them. You can also share your custom categories with other users in your organization.

To create a new custom category, follow these steps:

1. Click the New button in the Categories panel. The Add New Category dialog box opens.
2. Enter a category name and description.
3. Optionally, click the Change button next to the Parent Category field to nest your new category under a parent. Leave the field blank to save your new category under All Reports. You can have up to three levels of nested categories.
4. Share your category with other user roles by selecting them in the Available list and clicking > to move them into the Selected list. Users with the selected roles can access the category and the reports it contains as long as they also have access permissions for the reports.

   **Note:** Only users who have access to the parent category appear in the Available list. When you add users to the parent category, they are added to the Available list of all child categories.

5. Click Save. Your new category appears in the Categories panel.

**Modify Custom Categories**

While administrators can edit categories that were created by anyone, most users can edit only categories that they created. As mentioned earlier, system categories cannot be edited.

To edit a category, you can double-click its name, or click the name and then click the Edit button at the top of the categories list. The Edit Category dialog box opens; edit the properties as required. For more information, see Create New Custom Categories on page 61.

To quickly rename the category, right-click the name in the Categories panel, enter a new name, and then click Rename.

**Delete Custom Categories**

Users with administrator access can delete any empty custom category, while other users can only delete empty categories that they created. System categories cannot be deleted.

To delete a category, complete the following steps:

1. Remove any reports from the category. You can move them into other categories, or move them to the root category, All Reports.
2. Select the category and click Delete at the top of the categories list.
Use Categories to Share Reports

You can use the report categories in Reporting > Reports to share ad hoc reports with other users in your organization. Most of the system categories are mapped to another feature in the application. Users who have access to these reports can run them in the corresponding features. Custom categories are not mapped to other screens, but you can assign access to them to allow other users in your organization access to the reports they contain.

The following sections contain more information about how to share ad hoc reports within the ad hoc reporting feature and in other feature areas.

Share Report Categories with Other Reporting Users

You can share groups of reports with other users in your organization who have access to Reporting > Reports. Access to system reports is configured in System Admin > Roles, in the Features tab. There you can provide access to user roles to individual reports or to whole categories.

You can configure access to the custom categories that you create in Reporting > Reports. This feature allows you to share groups of reports with other users in your organization. For example, if you wanted to share a group of benefits reports with the benefits administration team, you could put them in a custom category and provide the benefits administration users with access to that category. Those users would be able to access the reports in that category in Reporting > Reports.

For more information about providing other users with access to your custom reports, see Create New Custom Categories on page 61.

Share Reports with Users in Other Feature Screens

The report category functionality allows you to share reports with users in other features. Most system categories are mapped to another feature in Dayforce. Reports in system categories can be access in the features that they are mapped to. To see an up to date list of the system categories and their corresponding features, hover your mouse cursor over the information icon in the Categories panel in Reporting > Reports:
You can make a custom report available in another feature of the application by moving it into the corresponding category. System reports are fixed in their categories. If you want to make a system report available in a different feature, you can create a copy of it and move the copy into the other feature’s corresponding category.
Build Topics

In Reporting > Topic Builder, you can create new topics to use in the report designer. The Topic Builder is a powerful tool that allows you to include fields from over a thousand available database tables, which are converted into query entities that return Benefits, HR, Payroll, and WFM information.

**Note:** It is recommended that you have an understanding of SQL and XML, database management, and the application's database fields to configure report topics.

Configuring report topics involves:

- Selecting entities to include in the topic. The **Entities** tab is used to configure which entities, or table groupings of fields, are included in the topic. All field groupings that are available are displayed under the **Available Entities** column, and groupings that appear in the report designer for the configured topic are displayed under the **Topic Entities** column. For more information, see **Select Topic Entities** on page 67.
- Configuring relationships, or join instructions, between fields in each entity. When two or more Topic Entities are selected, the **Relationships** tab is used to configure relationships, or join instructions, between fields under different entities. For more information, see **Configure Relationships** on page 69.
- Defining filters that restrict the information returned by reports created from the topic. The **Filters** tab is used to configure filters that restrict the information examined when the topic query is run. For more information, see **Define Filters** on page 73.

Add, Delete, or Copy a Topic

To add a new topic, click the **New** button.
To delete a custom topic, click the **Delete** button.

![My Reports - Topic Builder](image)

To copy a topic, select the topic and click the **Copy** button.

![My Reports - Topic Builder](image)

**Note:** You can copy a **System** topic that includes similar objects to edit, by copying the existing topic. When copying an existing topic and adding or removing objects or entities, ensure that the joins are properly maintained on the **Relationships** tab.

---

**Organize Topics**

Topics can be organized in Topic builder by associating them with topic categories. Clicking on the **Topic Category** column organizes topics according to their topic category.

To assign topics a category, complete the following steps:

1. Click the **Topic Categories** sub-feature from **Reporting**.
2. Click **New** and enter a name, description and reference code for the new category.
3. **Click Save**.
4. Navigate back to Topic Builder by clicking on the **Topic Builder** sub-feature from **My Reports**.
5. From the topic list, select the desired topic and from the **Topic Category** drop-down list select the topic category and click **Save**.

![My Reports - Topic Builder](image)

6. To organize all topics according to their category, click the Topic Category header.
Select Topic Entities

Query entities most reference a database table or joined tables that have been converted to query entities for use with the topic builder.

There are three columns displayed on the Entities tab: Available Entities, Related Entities and Topic Entities.

Note: By default the Details View checkbox is selected, providing detailed information about all of the entities and fields displayed on the Entities tab, to hide details clear the Details View checkbox.

Icons and labels are displayed beside each field to provide more information on the field. The icon indicates that the field is a key. The icon indicates that access to the field is controlled by an access authorization. The hover text specifies which access authorization controls access to the field. The icon indicates the data type of the field. In the example below, the field is a string with a maximum of 528 characters.

The Available Entities column lists all of the entities available when creating a new topic. Double-clicking an entity moves it to the Topic Entities column.

The Related Entities column is automatically populated with all of the available entities that are associated with the selected Topic Entities. Double-clicking an entity moves it to the Topic Entities column.

The Related Entities column can be filtered by selecting an entity from the Topic Entities column so that it is highlighted. Once highlighted, the related entities will appear.
To clear the filter so that all Related Entities are displayed, clear the Filter by Selection checkbox, or press Ctrl and click the entity to deselect it.

To view the fields included in a query entity, click the arrow next to the object name. The application expands the object to display the fields under it:

In the example above, the Veterans Status object is expanded to display all of the fields included in the entity.

You can also preview the data in an entity by selecting an entity and clicking the Preview button. Previewing the data in an entity ensures that the correct information will be captured in the topic. The preview screen displays 25 distinct data records for the entity, however, if the preview does not display any records, then there is no data stored in the entity.

For example, in the image below, the Account Type entity is being previewed and it contains two records detailing different account types:
You can also search for fields and available objects by typing in the search bar and selecting the **Field** or **Entity** radio button.

You can also preview the type of data in a query entity prior to adding it.

**Configure Relationships**

You determine the joins between topic objects by defining the relationships between fields in the query entities.
You can also allow the application to determine the relationship between the entities automatically, by selecting the **Manage Relationships** checkbox. By default, the checkbox is selected and the application automatically displays the recommended relationships for the selected entities. When the checkbox is cleared, the application does not automatically generate recommended relationships and they must be configured manually.

**Note:** The application automatically configures valid relationships when the **Manage Relationships** checkbox is selected, however additional configuration may be required based on the topic requirements.

To configure a new relationship:

1. Click **New Relationship**. The application adds a new, blank line.
2. Select the **Condition** from the drop-down list. You can select the following logical operators:
   - **AND:** Any relationship added to the topic with 'AND' selected in the **Condition** drop-down list must be met to be included in the topic; all of the filters that are included with 'AND' selected must be met for the relationship to be included.
   - **OR:** Any relationship added to the report with 'OR' selected in the **Condition** drop-down list represents one possible relationship value for a record to be eligible and included in the report; any of the relationships that are included with 'OR' selected must be met for the record to be included.
   For example, an 'OR' join would be used if you create a topic where you need to designate one topic for a specific group of stores that aren't grouped by the organization hierarchy in the application. Employee overtime costs cannot be compared by store or region, and a custom topic is created with a series of 'OR' joins that designate the store numbers to include in the topic.
3. Select the **Field** for which the relationship is defined.
   The application includes all of the fields under the query entities you selected on the **Entities** tab, formatted as:
   
   `[Query Entity].[Field]`
   
   To filter and search the list, enter any part of or all of the **Name** into the parameter.
4. Select the **Operation** applied to the **Field**:
   - `<>`
   - `<`
For example, combine rows from two database tables by selecting a Field, the '=' Operation, and the equivalent field on the Compare To Field drop-down list.

In the example above, the 'ID' field on the 'Department' entity is configured as equivalent to the 'Department ID' field on the 'Position' entity.

Note: It is recommended that most relationships be configured with the '=' operation, and filters are used to designate other topic criteria. For more information on configuring topic filters, refer to Define Filters on page 73.

5. If appropriate, define the Value.
The application only displays values that are applicable to the Field type.
For example, a relationship is configured so that only records where the 'Is Deleted' flag on the 'Employee Direct Deposit' query entity is 'False' are returned.

6. Select the Compare To Field.
The most common relationship configuration is a join-predicate that defines equivalency between the column values of the Field and the Compare To Field.

In the example above, the 'Department ID' field on the 'Position' entity is the equivalent compare to field of the 'ID' field on the 'Department'.

Note: Select the Filter Fields checkbox to limit the fields displayed on the Compare To Field parameter. By default, the Filter Fields checkbox is selected, and only fields that can be joined to the selected Field are displayed on the associated Compare To Field parameter.

7. Configure the type of join defined, by selecting or clearing the Is Required checkbox.
- Select the Is Required checkbox to configure an Inner Join relationship. An inner join returns the results of the intersect of the column values of the Field and the Compare To Field. In the case of an inner join, only the records where the join-predicate is satisfied in both columns are returned.
- Clear the Is Required checkbox to configure an Outer Join relationship. An outer join returns the results of the union of the column values of the Field and the Compare To Field. In the case of an outer join, all of the records in the columns are returned, even if no other matching record exists.

8. You can configure as many join relationships as necessary to return the information desired.
When you have configured all of the necessary relationships, click Save.
Define Parameters

Parameters are used to define the values in a filter. When the same values are used in multiple filters, you can save time by defining the value once on the Parameters tab and use it to set the Compare To value for filters on the Filters tab.

Note: The configuration of parameters is optional, and used when multiple of the same values need to be defined for filters.

To define a parameter:

1. In the Name field, enter a name for the parameter.
   Note: The application automatically adds an @ symbol when you type a name.
2. In the Group Name field, enter a group name for the parameter. The group name is the name that will display for the parameter on the preview page when running the report.
3. From the Data Type drop-down list, select the data type for the parameter.
4. In the Value field, enter a value for the parameter.
5. If the data type selected is of Reference type, select the reference entity and reference field from the Reference Entity and Reference Field drop-down lists.
6. If the parameter value is required when the report is run, select the Required checkbox.
7. Navigate to the Filters tab, and configure the Compare To filter values with the newly created parameters.

For example, in an employee details topic, filters can be specified so that the topic only returns information for employees who fall within a range of employment and assignment dates. Both the employment date and assignment date filters use the same date values. As a result, a parameter can be created for the start date value, for example 7/21/2014, denoted with the name @EffectiveStart and a parameter can be created for the end date value, for example 1/1/2050, denoted with the name @EffectiveEnd.
Then from the **Filters** tab, when specifying the date values for the filters, the parameters can be selected to specify the range of dates in which the employment and assignment dates must fall between. For example, the start date (@EffectiveStart) and end date (@EffectiveEnd) parameter can be selected from the **Compare To** drop-down list.

### Define Filters

Configuring filters at the topic level is a similar process to configuring filters on reports. Filters are based on fields in the selected topic and use a variety of operations to determine what data is included and excluded in the report.

**Note:** Filters configured on the **Filters** tab of the **Topic Builder** are not visible or editable by users that create reports based on the topic. These filters are only displayed on the **Topic Builder**, and are hard coded into the configured topic when it is viewed in the report designer.

Complete the following steps to define filters:

1. Click **New**. The application adds a new, blank line.
2. Select the **Condition**. By default, filters are linked by the 'AND' condition.
   - **AND**: Any filter added to the report with **And** selected in the **Condition** drop-down list must evaluate to true for the record to be eligible and included in the report; all of the filters that are included with **And** selected must be met for the record to be included.
   - **OR**: Any filter added to the report with **Or** selected in the **Condition** drop-down list represents one possible filter value for a record to be eligible and included in the report; any of the filters that are included with **Or** selected must be met for the record to be included.
3. Select a **Field** from the drop-down list and define the **Operation** to perform on it. If appropriate, specify a **Value** for the operation.
In the example above, the 'Xref Code' Field of the 'Employment Status Group' query entity is filtered by the Operation '<>', and configured with a Value of 'TERMINATED'. The report returns employees with any employment status other than terminated.

In general, there are four types of data that can be used when filtering report data:

- **Numeric**: Reports can be filtered on the values of fields that store numeric values, such as Rate or Hours; numeric field filters can use any arithmetical operation, such as Equal, Not Equal, Less Than, Less Than Equal, Greater Than, or Greater than Equal.

- **Dates**: Fields that store dates, such as Hire Date or Seniority Date, can be filtered in the same manner as numeric fields, where earlier dates are considered 'less than' the specified date, and later dates are considered 'greater than' the specified date.

- **Names**: Reports can be filtered on the values of fields that store alphanumeric (a combination of letters and/or numbers) values that represent names or labels, such as Department or Employee; these filters can use any comparison operation, such as Contains, Not Contains, Begins With, Ends With, In or Not In.

- **Flags**: Reports can be filtered on the values of fields that store Boolean (either true or false) values, typically checkboxes such as the Is Primary field. Boolean fields can use the Equal or Not Equal operations. For these filters, specify True to filter on checkboxes that are selected, or False to filter on checkboxes that are cleared, in the Value field.

In addition to these operations, any field can be filtered using the Empty or Not Empty operation; these filter out fields based on whether or not they contain a value.

4. You can add as many filters as necessary; to add additional filters, click New and link the filters with a Condition.

5. Click Save.

**Note**: Once the topic has been saved, it is visible to all report builder users in the create new report dialog box of the report designer. If the topic does not immediately appear, click the Refresh button on Reporting > Reports.

### Validating Topics

You can validate a custom topic at any point during the configuration by clicking the Validate button.

The application presents a message that indicates if the topic is valid, or if an error was found:
In addition, when you save a custom topic, the application validates the accuracy of the topic and presents an error message if an error is found.

For example, a topic is configured that includes the Topic Objects 'Employee HR Incident', 'HR Incident Action', 'HR Incident Injury', and 'HR Incident Type'. The topic is configured with Relationships only defined between the '[HR Incident Action].[Id]' and '[Employee HR Incident].[HR Incident Action Id]' fields, and the '[HR Incident Type].[Id]' and '[Employee HR Incident].[HR Incident Type Id]' fields:

When the topic is saved, the application validates the accuracy of the topic and determines that the necessary relationship between the '[HR Incident Injury].[HRIncidentInjury]' field and the '[Employee HR Incident].[HR Incident Injury Id]' fields has not been configured, and displays an error message:

The topic can be saved successfully once the appropriate relationships have been validated.
Report Topics Library

This section describes the report fields available for each of the ad hoc report topics that can be selected in the report designer. For each topic, there is an overview of the information that the topic contains, and a list of the groups of fields that the topic contains.

For a more detailed list of the fields in each topic, refer to the Reporting Reference Guide.

There are two types of topics: V1 and V2. V1 topics are SQL-based and are created outside of Reporting > Topic Builder. V2 reports are created within the Topic Builder, and you can view information about them in Reporting > Topic Builder.

To identify whether a topic is V1 or V2, refer to the Topic Fields sheet in the Reporting Reference Guide. The following table describes some of the differences between the two types of report topic:

<table>
<thead>
<tr>
<th>V1 Topics</th>
<th>V2 Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created outside of the Topic Builder using SQL. Cannot be edited in the Topic Builder. Can use a custom field in the expression for another custom field. Report distribution is not supported.</td>
<td>Created in Reporting &gt; Topic Builder and can be viewed and edited there. Can be edited in the Topic Builder. Cannot use a custom field in the expression for another custom field. Can be distributed to other employees in your organization.</td>
</tr>
</tbody>
</table>

ACA - Payroll Based Journal

The ACA - Payroll Based Journal topic displays employee and staffing details to support Section 6106 of the Affordable Care Act (ACA), which requires long-term care facilities to submit direct care staffing information.
The topic contains fields under the following query entities:

- Employee
- Employee Employment Status
- Employee Pay Summary Net
- Labor Metrics Code 0
- Labor Metrics Code 1
- Labor Metrics Code 2
- Labor Metrics Code 3
- Labor Metrics Code 4
- Labor Metrics Code 5
- Labor Metrics Code 6
- Labor Metrics Code 7
- Labor Metrics Code 8
- Labor Metrics Code 9
- Pay Code
- Pay Group
- Pay Type

**ACA - Payroll with Earning Codes**

The ACA - Payroll with Earning Codes topic contains employee earnings hours based on payroll data. You can define the measurement period by using the pay date parameters, and you can use the earning code filter to exclude premium earnings for premiums that are calculated using overlapping premiums or hours.

The topic contains fields under the following query entities:

- Earning
- Employee
- Employee Employment Status
- Employment Status
- Location
- Pay Run Earning Committed
- Position
- PPACA Custom

**Access Authorizations**

The Access Authorizations topic contains all user roles with their access authorization information.

The topic contains fields under the following query entities:

- Access Authorization
- Role
- Role Access Authorization
Affordable Care Act - Eligibility Status

The Affordable Care Act - Eligibility Status topic contains employee work hours based on the WFM or Payroll data as defined in preconfigured PPACA calendars and stability periods. This topic leverages the benefits eligibility qualifier calculation to determine eligibility.

The topic contains fields under the following query entities:
- Benefits PPACA Calendar
- Benefits PPACA Calendar Cycle
- Benefits PPACA Employee Eligibility Custom
- Contact Information Type
- Contact Information Type Group
- Employee
- Employee Employment Status
- Employee Pay Summary Net
- Employment Status
- Location
- Pay Category
- Pay Class
- Pay Code
- Person Address
- Position

Affordable Care Act - Employee Offered Coverage

The Affordable Care Act - Employee Offered Coverage topic displays information about employees and dependents offered benefits coverage, including the benefit plan options and the date coverage was offered.

The topic contains fields under the following query entities:
- Benefit Dependent Offering
- Benefit Employee Enrollment
- Benefit Employee Offering
- Benefit Plan
- Benefit Plan Employee Elected Option
- Benefit Plan Employee Eligible Benefit Option
- Benefit Plan Option
- Benefit PPACA Calendar
- Benefit PPACA Calendar Cycle
- Benefit PPACA Employee Eligibility
- Department
- Employee
- Employee Employment Status
• Job
• Location
• Position

Affordable Care Act - No Period Assigned

The Affordable Care Act - No Period Assigned topic contains details about employees who are not assigned to an Affordable Care Act period.

The topic contains fields under the following query entities:

• Ben PPACA Employee Not Assigned Period Custom
• Employee
• Employee Employment Status
• Employee Work Assignment
• Employment Status
• Employment Status Group
• Pay Class
• Position

Affordable Care Act - Year End

The Affordable Care Act - Year End topic displays year end details related to the Affordable Care Act for employees and covered individuals.

The topic contains fields under the following query entities:

• Ben PPACA Year End Filing
• Ben PPACA Year End Legal Entity
• Benefit PPACA Year End Employee 1095 Covered Individual Custom
• Benefit PPACA Year End Employee 1095 Custom
• Benefit PPACA Year End Employee Electronic Consent Custom
• Employee
• Employee Dependent Beneficiary
• Employee Employment Status
• Relationship Type

Anomaly Days

The Anomaly Days topic returns information on days employees were absent due to situations such as floods, power outages, or snow storms.

The Anomaly Days topic contains fields under the following query entities:

• Anomaly Day
• Anomaly Day Assignment
• Anomaly Day Date
• Anomaly Day Group
• Anomaly Day Group Assignment
• App User
• Location

**Benefit Enrollment Notifications**

The Benefit Enrollment Notifications topic contains information about employees and their enrollment notifications.

The topic contains fields under the following query entities:

- Benefit Employee Enrollment
- Benefit Employee Enrollment Status
- Benefit Enrollment Notification Message
- Benefit Enrollment Type
- Employee
- Employee Employment Status
- Employment Status
- Form Template

**Benefit Enrollment Status**

The Benefit Enrollment Status topic contains information about employees, their benefit enrollments, and the statuses of their enrollments.

The topic contains fields under the following query entities:

- Benefit Employee Enrollment
- Benefit Employee Enrollment Status
- Benefit Enrollment Type
- Employee
- Employee Employment Status
- Employment Status
- Form Template

**Benefit Enrollment Status incl Address**

The Benefits Enrollment Status incl Address topic contains information on employees and their enrollments and the status of their enrollment including addresses.

The topic contains fields under the following query entities:
Benefit Enrollment Status incl Address, Language and Work Assignment

The Benefits Enrollment Status incl Address, Language & Work Assignment topic contains information on employees and their enrollments and the status of their enrollment including addresses, language, and work assignment.

The topic contains fields under the following query entities:

- App User
- Benefit Employee Enrollment
- Benefit Employee Enrollment Status
- Benefit Enrollment Type
- Contact Information Type
- Culture
- Employee
- Employee Employment Status
- Employee Work Assignment
- Employment Status
- Form Template
- Person Address
- Position

Benefit Management Audit

The Benefit Management Audit topic contains benefit information for employees such as changes to their benefit elections, override details, and benefit plan information.

The topic contains fields under the following query entities:

- Benefit Employee Election EOI Status
- Benefit Option Rate
- Benefit Option Rate Value
- Benefit Plan
- Benefit Plan Carrier
• Benefit Plan Employee Dependent Election Option
• Benefit Plan Employee Elected Option
• Benefit Plan Employee Elected Option Rate
• Benefit Plan Employee Eligible Benefit Option
• Benefit Plan Option
• Benefit Plan Sub Type
• Benefit Plan Type
• Contact Information Type
• Contact Information Type Group
• Department
• Employee
• Employee Badge
• Employee Dependent Beneficiary
• Employee Health Wellness
• Employee Work Assignment
• Employment Indicator
• Employment Status Reason
• Pay Class
• Pay Group
• Pay Type
• Person Address
• Position
• Relationship Type
• Relationship Type Benefit Group

Benefits Election Changes

Before You Begin: This topic was removed from the Topic Builder in Release 54. You can continue to use and edit custom reports that were created using this topic before Release 54, but you can no longer use this topic to create new reports. The recommended replacement topic is Benefit Management Audit.

The Benefits Election Changes topic contains data about changes to benefit elections for employees, dependents, and beneficiaries, including personal and status information.

The topic contains fields under the following query entities:

• Earning
• Employee
• Employee Employment Status
• Employment Status
• Location
• Pay Run Earning Committed
• Position
• PPACA Custom
Benefits Message Center

The Benefits Message Center topic displays detailed information about benefits-related messages that are sent from the message center.

The topic contains fields under the following query entities:

- Benefit Employee Enrollment
- Benefit Enrollment Notification Message
- Department
- Employee
- Employee Employment Status
- Employee Work Assignment
- Employment Status
- Employment Status Group
- Job
- Location
- Message
- Message Recipient
- Message Recipient Type
- Message Type
- Position

Candidate Data Minimization Activity

This topic contains point-in-time data minimization activity information for candidates. You can use this topic to create reports that you can use in conjunction with the Data Management Center to meet data minimization requirements. For more information, see "Personal Data Management" in the Dayforce Implementation Guide.

The topic contains fields in the following query entities:

- Candidate
- Candidate Profile
- Geo Country
- Personal Data Management Policy
- Personal Data Management Policy Type
- Personal Data Management Retention Activity

Candidate Detail for Personal Data Management Policy Association

This topic contains effective-dated demographic information that is used to determine which personal data management policies apply to candidates. You can use this topic to review which
policies are applied to candidates and why. For more information, see "Personal Data Management" in the *Dayforce Implementation Guide*.

This topic contains fields in the following query entities:

- Candidate
- Candidate Data Management Country Info
- Candidate Profile

### Candidate EEO

The Candidate EEO topic contains candidate EEO information, including demographic, application and questionnaire information.

**Note:** In some countries, EEO data must not be visible to recruiters and hiring managers. You should check the requirements in your country and organization when assigning access to reports on this topic.

The topic contains fields under the following query entities:

- Affiliation
- Application Decline Reason
- Application Status
- Candidate
- Candidate Document
- Candidate Link
- Candidate Link Type
- Candidate profile
- Candidate Reference
- Candidate Training
- Certification
- Company
- Degree
- Department
- Education Concentration
- Education History
- Job
- Job Application Source
- Job Family
- Job Posting Application
- Job Posting Application Status
- Job Requisition
- Location
- Military Branch
- Military History
- Patent History
- Pay Grade
- Position
• Publication History
• Publication Type
• Questionnaire Response EEO Custom
• School
• Security Credential
• Speaking History
• Work History

Candidates

The Candidates topic includes candidate profile information, including education, degrees, work history and certification.

The topic contains fields under the following groupings:

• Affiliation
• Application Document
• Candidate
• Candidate Document
• Candidate Link
• Candidate Link Type
• Candidate Profile
• Candidate Reference
• Candidate Training
• Certificate
• Company
• Degree
• Education Concentration
• Education History
• Military Branch
• Military History
• Patent History
• Publication History
• Publication Type
• School
• Security Credential
• Speaking History
• Work History

Carrier List Bill

The Carrier List Bill topic contains benefit information that administrators can use to create Carrier List Bill reports.
The Compensation Management topic contains all published compensation cycles information, including manager allocations and employee compensation details for each reward type within a cycle.

The topic contains fields under the following query entities:

- Compensation Cycle
- Compensation Cycle Pay Component
- Compensation Cycle Pay Component Bonus Factor
• Compensation Manager Worksheet
• Compensation Cycle Worksheet Status
• Department
• Employee
• Employee Manager
• Employment Status
• Location
• Manager Worksheet Employee Bonus Factor
• Manager Worksheet Employee List
• Manager Worksheet Employee Pay Component
• Manager Worksheet Pay Component
• Pay Class
• Pay Group
• Pay Type
• Performance Rating Scale
• Position

Confidential Identifications

The Confidential Identifications topic contains employee confidential identification details, including right to work documents.

The topic contains fields under the following query entities:

• Confidential Identification Type
• Employee
• Employee Confidential Identification
• Employee Employment Status
• Employee Manager
• Employment Status
• Employment Status Group
• RTW Document Type
• RTW List Type

ConnectedPay - Employee Properties Export

Before You Begin: Although this topic is available for all clients, reports based on this topic generate data only if you have ConnectedPay. If you don’t have ConnectedPay, reports based on this topic don’t generate any data.

The ConnectedPay - Employee Properties Export topic contains detailed employee personal information, employee properties, and contact information required for payroll processing. Payroll administrators can use this topic to export the data required to send to an ICP for payroll processing.

The topic contains fields under the following query entities:
Current Flight Risk and Performance Review

The Current Flight Risk and Performance Review topic contains current employee information and performance review details with flight risk predictions.

The topic contains fields under the following query entities:

- Current Employee Contact
- Department
- Employee
- Employee Employment Status
- Employee Ethnicity
- Employee Flight Risk Details
- Employee Group
- Employee Manager
- Employee Marital Status
- Employee Review Cycle View
- Employee Work Assignment
- Employment Status
- Employment Status Group
- Employment Status Reason
- Ethnicity
- Geo City
• Geo Country
• Job
• Job Family
• Location
• Marital Status
• Org Level
• Pay Class
• Pay Grade
• Pay Group
• Pay Policy
• Pay Type
• Pay Type Group
• Position
• Zone

**Document Management**

The Document Management topic displays information about documents stored in the application, including their properties, security, and history.

The topic contains fields under the following query entities:

• App User
• Doc Mgmt File Details Custom
• Document Archive Access History
• Document Management Entity
• Document Management File Status
• Document Management File Store
• Document Management File Store Audit
• Document Management File To Document Management Tag
• Document Management File To Document Management Tag Audit
• Document Management File Type
• Document Management File Type Audit
• Document Management Permission
• Document Management Role Map
• Document Management Security Group
• Document Management Security Group Audit
• Document Management Security Group User Map
• Document Management Security Group User Map Audit
• Document Management Tag
• Document Management Tag Audit
• Document Management Type
• Document Management Type Audit
• Document Management Type To Document Management Entity
• Document Management Type To Feature
• Document Management Type To Security Group Map
• Workflow Data
Employee

The Employee topic contains fields relating to employee information, such as name, address, phone number, policies, groups, badge, login ID and so on.

The data returned by the Employee report topic can generally be viewed on an employee’s record on My HR.

The Employee topic contains fields under the following groupings:

- Attendance Policy
- Department
- Emergency Contacts
- Employee
- Employee Contact Information
- Employee Employment Status
- Employee Group
- Employee Work Assignment
- Employment Status
- Employment Status Reason
- Entitlement Policy
- Job
- Location
- Other
- Override Work Location
- Overtime Group
- Pay Class
- Pay Group
- Pay Holiday Group
- Pay Policy
- Pay Type
- Position
- Punch Policy
- Schedule Rule Policy
- Shift Rotation
- Shift Trade Policy
- Time Off Policy
- Union

Note: Employee Property fields are not included by default in this topic. To have this functionality enabled, contact your Dayforce Support Representative.
Employee Balance Transaction

The Employee Balance Transaction topic contains information about balances, balance periods, and balance transactions as they pertain to employees.

The topic contains fields under the following query entities:

- Balance
- Deficit Hours Balance Custom
- Department
- Employee
- Employee Balance
- Employee Balance Period
- Employee Balance Transaction
- Employee Employment Status
- Employee Manager
- Employee TAFW Custom
- Employee Work Assignment
- Employee Work Contract
- Employment Status
- Employment Status Group
- Excess Hours Balance Custom
- Job
- Location
- Position
- TAFW Status
- Work Contract
- Work Pattern Detail

Employee Benefits Coverage

**Before You Begin:** This topic was removed from the **Topic Builder** in Release 54. You can continue to use and edit custom reports that were created using this topic before Release 54, but you can no longer use this topic to create new reports. Recommended replacement topics are Employee Benefit Elections and Employee Benefit Elections - As of Date.

The data returned by the Employee Benefits Coverage fields can generally be viewed on an employee's record on **My HR**.

The report differs from the Employee Benefits Election topic, which returns information on employees’ current, historical, and future dated election records, based on the specified date range and employment status.

The Employee Benefits Coverage topic contains fields under the following groupings:

- Benefit Elections
- Benefit Plans
The Employee Benefits Coverage End topic contains information about benefit elections for employees and dependents that have ended due to a coverage end event. Employee, dependent, and benefit plan information is included.

The topic contains fields under the following query entities:

- Benefits Coverage End Event
- Benefit Option Rate
- Benefit Option Rate Value
- Benefit Plan
- Benefit Plan Carrier
- Benefit Plan Employee Dependent Elected Option
- Benefit Plan Employee Elected Option
- Benefit Plan Employee Eligible Benefit Option
- Benefit Plan Option
- Benefit Plan Sub Type
- Benefit Plan Type
- Department
- Employee
- Employee Dependent Beneficiary
- Employee Employment Status
Employee Benefits Elections

The data returned by the Employee Benefits Election fields include information on employees' current, historical, and future dated election records, based on the specified date range and employment status.

The report differs from the Employee Benefits Coverage topic, which returns information only on current employee elections.

The Employee Benefits Coverage topic contains fields under the following query entities:

- Benefit Plan
- Benefit Plan Carrier
- Benefit Plan Employee Dependent Elected Option
- Benefit Plan Employee Elected Option
- Benefit Plan Employee Elected Option Rate
- Benefit Plan Employee Eligible Benefit Plan Option
- Benefit Plan Option
- Benefit Plan Option Rate
- Benefit Plan Option Rate Value
- Benefit Plan Sub Type
- Benefit Plan Type
- Contact Information Type
- Contact Information Type Group
- Department
- Employee
- Employee Dependent Beneficiary
- Employee Employment Status
- Employee Group
- Employee Health Wellness
- Employee Work Assignment
Employee Benefit Elections - As of Date

The Employee Benefit Elections - As of Date topic contains benefit elections for employees, dependents and beneficiaries for a specific point in time using the As of Date parameter. Employee, status, work assignment, and benefit plan information is included.

The topic contains fields under the following query entities:

- Benefit Employee Election EOI Status
- Benefit Option Rate
- Benefit Option Rate Value
- Benefit Plan
- Benefit Plan Carrier
- Benefit Plan Employee Dependent Elected Option
- Benefit Plan Employee Elected Option
- Benefit Plan Employee Elected Option Rate
- Benefit Plan Employee Eligible Benefit Option
- Benefit Plan Option
- Benefit Plan Sub Type
- Benefit Plan Type
- Contact Information Type
- Contact Information Type Group
- Department
- Employee
- Employee Badge
- Employee Dependent Beneficiary
- Employee Employment Status
- Employee Group
- Employee Health Wellness
- Employee Work Assignment
- Employment Indicator
- Employment Status
- Employment Status Group
- Employment Status Reason
- Pay Class
- Pay Group
Employee Benefit Enrollment

The Employee Benefit Enrollment topic returns information on enrollment details for employees, along with employee, employment status, work assignment, and benefit plan information.

The Employee Benefit Enrollment topic contains fields under the following query entities:

- Benefit Employee Enrollment
- Benefit Employee Enrollment Status
- Benefit Option
- Benefit Option Rate
- Benefit Option Rate Value
- Benefit Plan
- Benefit Plan Carrier
- Benefit Plan Employee Dependent Elected Option
- Benefit Plan Employee Elected Option
- Benefit Plan Employee Elected Option Rate
- Benefit Plan Employee Eligible Benefit Option
- Benefit Plan Sub Type
- Benefit Plan Type
- Department
- Employee
- Employee Dependent Beneficiary
- Employee Employment Status
- Employee Group
- Employee Health Wellness
- Employee Work Assignment
- Employee Indicator
- Employment Status
- Employment Status Group
- Employment Status Reason
- Form Template
- Pay Class
- Pay Group
- Pay Type
- Position
- Relationship Type
- Relationship Type Benefit Group
Employee Certifications

The Employee Certifications topic contains detailed information about the certifications associated with the employees in your organization.

The topic contains fields under the following query entities:

- Course
- Department
- Employee
- Employee Employment Status
- Employee Manager
- Employee Work Assignment
- Employment Status
- Employment Status Group
- Job
- LMS Certification
- LMS Employee Certification
- Location
- Position
- Training Program

Employee Contact Details

The Employee Contact Details topic displays contact information for employees, such as their address and their emergency contact(s).

The topic contains fields under the following query entities:

- Contact Information Type
- Contact Information Type Group
- Department
- Emergency Contact Custom
- Employee
- Employee Badge
- Employee Employment Status
- Employee Group
- Employee Manager
- Employee Work Assignment
- Employment Status
- Employment Status Group
- Employment Status Reason
- Job
- Location
- Person Address
- Person Contact
- Position
Employee Course Details

The Employee Course Details topic contains detailed information about employee courses from the Learning Management module.

The topic contains fields under the following query entities:

- Course
- Course Type
- Department
- Employee
- Employee Course Details Custom
- Employee Employment Status
- Employee Manager
- Employee Work Assignment
- Employment Status
- Employment Status Group
- Location
- Position

Employee Data Minimization Activity

This topic contains point-in-time data minimization activity information for employees. You can use this topic to create reports that you can use in conjunction with the Data Management Center to meet data minimization requirements. For more information, see "Personal Data Management" in the Dayforce Implementation Guide.

The topic contains fields in the following query entities:

- Department
- Employee
- Employee Employment Status
- Employee Employment Type
- Employee Group
- Employee Manager
- Employee Union
- Employee Work Assignment
- Employment Status
- Employment Type
- FLSA Status
- Geo Country
- Job
- Job Family
- Location
Employee Detail for Personal Data Management Policy Association

This topic contains effective-dated demographic information that is used to determine which personal data management policies apply to employees. You can use this topic to review which policies are applied to employees and why. For more information, see "Personal Data Management" in the *Dayforce Implementation Guide*.

This topic contains fields in the following query entities:

- Department
- Employee
- Employee Data Management Country Info
- Employee Employment Status
- Employee Group
- Employee Manager
- Employee Union
- Employee Work Assignment
- Employment Status
- FLSA Status
- Job
- Job Family
- Location
- Org Level
- Pay Class
- Pay Grade
- Pay Group
- Pay Type
- Pay Type Group
- Position
- Union
- Zone
Employee Details - Personal

The Employee Details - Personal topic contains personal employee information for a specified point in time or date range based on the dates entered in the parameters. For a point in time report, use the same date for Start and End.

The data returned by the Employee Details - Personal report topic can generally be viewed on an employee's record on My HR.

The Employee Details - Personal topic contains fields under the following groupings:

- Attendance Policy
- Clock Device Group
- Department
- Emergency Contact
- Employee
- Employee Badge
- Employee Clock Device Group
- Employee Employment Status
- Employee Ethnicity
- Employee Group
- Employee Manager
- Employee Marital Status
- Employee OT Group
- Employee Performance Rating
- Employee Schedule Policy
- Employee Union
- Employee Veterans Status
- Employee Work Assignment
- Employment Status
- Employment Status Reason
- Entitlement Policy
- Ethnicity
- Job
- Location
- Marital Status
- Pay Class
- Pay Grade
- Pay Group
- Pay Holiday Group
- Pay Policy
- Pay Run Result
- Pay Type
- Payroll Policy
- Performance Rating
- Performance Cycle
- Person Address
- Person Contact
Employee Details - Work

Before You Begin: This topic was removed from the Topic Builder in Release 54. You can continue to use and edit custom reports that were created using this topic before Release 54, but you can no longer use this topic to create new reports. The recommended replacement topic is Employee Details - Personal.

The Employee Details - Work topic contains employee work information for a specified point in time or date range based on the dates entered in the parameters. For a point in time report, use the same date for Start and End.

The data returned by the Employee Details - Work report topic can generally be viewed on an employee's record on My HR.

The Employee Details - Work topic contains fields under the following groupings:

- Clock Device Group
- Department
- Employee
- Employee Badge
- Employee Clock Device Group
- Employee Employment Status
- Employee Group
- Employee Manager
- Employee OT Group
- Employee Schedule Policy
- Employee Work Assignment
- Employment Status
- Employment Status Reason
- Entitlement Policy
- Job
- Location
- Pay Class
- Pay Grade
- Pay Group
- Pay Holiday Group
- Pay Policy
- Pay Type
- Payroll Policy
- Position
Employee EEO Data

The data returned by the Employee EEO Data fields can generally be viewed on an employee's record on My HR.

The system EEO-1 Filing Report produces a CSV export file that is formatted for online filing of the EEO-1 survey; the submission ready file produced by the EEO-1 Filing Report does not have headers. To validate the EEO data included in the EEO-1 Filing Report, an ad hoc report can be created on the Employee EEO Data topic.

The Employee EEO Data topic contains fields under the following groupings:

- Contact Information Type
- Department
- EEO-1 Job Category
- Employee
- Employee Employment Status
- Employee Ethnicity
- Employee Work Assignment
- Employment Status
- Ethnicity
- Job
- Location
- Org Level
- Person Address
- Position

Employee Engagement Details

The Employee Engagement Details topic contains data from the TeamRelate feature, such as an employee element rating and traits based on their survey answers.

The topic contains fields under the following query entities:

- Contact Information Type
- Department
- EEO Classification
- Employee
- Employee Employment Status
- Employee Ethnicity
- Employee Manager
• Employee Marital Status
• Employee Veterans Status
• Employee Work Assignment
• Employment Status
• Employment Status Group
• Employment Status Reason
• Ethnicity
• Geo Country
• Job
• Location
• Marital Status
• Org Level
• Pay Class
• Pay Group
• Pay Type
• Person Address
• Position
• TeamRelate Engagement Custom
• TeamRelate Survey Not Taken Custom
• Veterans Status
• Zone

**Employee History - Locations**

The data contained in the Employee History - Locations fields can generally be viewed on an employee's record on *My HR*.

The Employee History - Locations topic contains fields under the following groupings:

- Employee
- Employee Employment Status
- Employee Work Assignment
- Location

**Employee History - Status**

The data contained in the Employee History - Status fields can generally be viewed on an employee's record on *My HR*.

The Employee History - Status topic contains fields under the following groupings:

- Attendance Policy
- Department
- Employee
- Employee Contact Information
- Employee Employment Status
Employee History - Work Assignment

The data contained in the Employee History - Work Assignment fields can generally be viewed on an employee's record on My HR.

The Employee History - Work Assignment topic contains fields under the following groupings:

- Attendance Policy
- Department
- Employee
- Employee Contact Information
- Employee Employment Status
- Employee Group
- Employee Work Assignment
- Employment Indicator
- Employment Status
- Employment Status Reason
- Entitlement Policy
- Job
- Location
- Other
- Override Work Location
Employee Leave Management

The Employee Leave Management topic contains employee leave record details, status, pay group, and additional data about employees. Effective dating is applied using a date range.

**Note:** The data in this topic comes from the Leave Management screen in the People feature. This screen is only used for employees in the UK.

The topic contains fields under the following query entities:

- Department
- Employee
- Employee Employment Status
- Employee Group
- Employee Leave of Absence
- Employee LOA Adoption
- Employee LOA Maternity Paternity
- Employee Manager
- Employee Marital Status
- Employee Work Assignment
- Employment Status
- Employment Status Group
- Employment Status Reason
- Geo City
- Geo Country
- Job
- Job Family
- Location
- Marital Status
- Org Level
- Pay Class
- Pay Group
Employee Leave Management with Pay Details

The Employee Leave Management with Pay Details topic contains employee leave record details, status, pay details, and additional data about employees.

Note: The data in this topic comes from the Leave Management screen in the People feature. This screen is only used for employees in the UK.

The topic contains fields under the following query entities:

- Department
- Earning
- Earning Code
- Earning Type
- Employee
- Employee Employment Status
- Employee Group
- Employee Leave of Absence
- Employee LOA Adoption
- Employee LOA Maternity Paternity
- Employee Manager
- Employee Marital Status
- Employee Work Assignment
- Employment Status
- Employment Status Group
- Employment Status Reason
- Geo City
- Geo Country
- Job
- Job Family
- Location
- Marital Status
- Org Level
- Pay Class
Employee Pay Summary

The Employee Pay Summary topic is designed to mirror the Pay Summary Report in Timesheets. It contains fields that can be found in employees' timesheet records, which can be viewed through Timesheets > Pay, as well as fields from the 'Employee' topic -- all but the emergency contact information fields -- so that employee data can be included in pay reports. For more information on these fields, refer to the 'Employee' topic.

While both the Employee Pay Summary and the Pay topic contain similar information, the Pay topic generates reports based on the current reporting structure, the Employee Pay Summary topic generates reports based on the reporting structure for the time period being examined. Consider an example where Bob reports to Sharon until the end of July, at which point he starts reporting to Carol. After July, when Sharon generates a report for the period of time that Bob reported to her, Bob will be excluded from the report because the application examines the current reporting structure. However, using the Employee Pay Summary topic, Bob is included in reports for the time period during which he reported to Sharon.

The Employee Pay Summary topic contains fields under the following query entities:
Employee Pay Summary with Labor Metrics

The Employee Pay Summary with Labor Metrics topic contains detailed employee pay information, including employee work assignment, department, job, and position, along with hours worked and pay amount, category, labor metrics, class, and type.

The topic contains fields under the following query entities:

- Department
- Employee
- Employee Employment Status
- Employee Manager
- Employee Pay Adjust
- Employee Pay Summary
- Employee Punch
- Employment Status
- Employment Status Group
- Job
- Labor Metrics Code 0-9
- Labor Metrics Type 0-9
- Location
- Pay Category
- Pay Category Group
- Pay Code
- Pay Group
- Pay Group Calendar
- Pay Type
- Position

Employee Payroll Profile

The Employee Payroll Profile topic displays employee payroll deductions and earnings based on the values in their employee profile (in My HR > Payroll Elections), rather than the values for individual pay periods.

The topic contains fields under the following query entities:

- Deduction
- Deduction Limit
- Deduction Param
The Employee PEPM Detail Billing topic displays employee-level details used to bill for PEPM (per employee per month) charges.

**Note:** Although the PEPM billing report topic is available to all clients as of version 7.48, the report will only return data for clients who are participating in the Dayforce Billing Pilot. The topic currently includes only information used for PEPM billing.

The topic contains fields under the following query entities:

- Billing Category
- Billing PEPM Detail
- Employee
Employee Punch

The Employee Punch topic contains information about employee punches, including start and end punches, total hours, hours paid, and exception information.

The topic contains fields under the following query entities:

- Department
- Employee
- Employee Employment Status
- Employee Manager
- Employee Punch Custom
- Job
- Location
- Pay Group
- Pay Group Calendar
- Position

Employee Turnover

The Employee Turnover topic contains employee headcounts, terminations, termination reasons and additional employee data.

The topic contains fields under the following query entities:

- Contact Information Type
- Department
- EEO Classification
- Employee
- Employee Employment Status
- Employee Ethnicity
- Employee Group
- Employee HR Policy
- Employee Manager
- Employee Marital Status
- Employee Union
- Employee Veterans Status
- Employee Work Assignment
- Employment Status
- Employment Status Group
- Employment Status Reason
- Ethnicity
- FLSA Status
- Geo City
- Geo Country
- HR Policy
- Job
• Job Family
• Location
• Marital Status
• Org Level
• Pay Class
• Pay Grade
• Pay Group
• Pay Policy
• Pay Type
• Pay Type Group
• Person Address
• Position
• Status at End
• Status at Start
• Termination at End
• Union
• Veterans Status
• Zone

Employee User Role

The Employee User Role topic contains all employee and non-employee user role association information.

The topic contains fields under the following query entities:

• App User
• Department
• Employee
• Location
• Role
• User Role
• User Type

Employee with Direct Deposit

The Employee with Direct Deposit topic contains employee direct deposit information for all active direct deposit records, including work assignment and location information.

The data returned by the Employee with Direct Deposit report topic can generally be viewed on an employee’s record on My HR.

The Employee with Direct Deposit topic contains fields under the following groupings:

• Contact Information Type
• Department
Employees with a Benefit Election Override

Before You Begin: This topic was removed from the Topic Builder in Release 54. You can continue to use and edit custom reports that were created using this topic before Release 54, but you can no longer use this topic to create new reports. The recommended replacement topic is Benefit Management Audit.

The Employees with a Benefit Election Override topic contains information about employee benefit elections that have an override. The topic includes employee personal and status information.

The topic contains fields under the following query entities:

- Benefit Elections
- Employee
- Employee Employment Status

Employees with Pending EOI Status

The Employees with Pending EOI Status topic contains information about employees who have elections that have a pending EOI status. The topic includes employee personal information, status, and coverage amount.

The topic contains fields under the following query entities:

- Benefit Elections
- Employee
- Employee Employment Status
Enrollment Setup

The Enrollment Setup topic contains configuration information for benefits enrollments. Benefits administrators can use this topic to report on benefits enrollment setup details.

The topic contains fields under the following query entities:

- Benefit Enrollment Event
- Benefit Enrollment Period
- Benefit Enrollment Periodic Event
- Benefit Enrollment PPACA
- Benefit Enrollment Type
- Form Template

Entitlement Balances and Accruals

The data contained in the Entitlement Balances and Accruals fields can generally be viewed on an employee's record on My HR.

The Entitlement Balances and Accruals topic contains fields under the following groupings:

- Balance
- Department
- Employee
- Employee Balance
- Employee Balance Period
- Employee Employment Status
- Employee Entitlement Date
- Employee Group
- Employee Manager
- Employee Work Assignment
- Employment Status
- Employment Status Group
- Entitlement
- Entitlement Balance Custom
- Entitlement Policy
- Job
- Location
- Pay Class
- Pay Class Group
- Pay Group
- Pay Type
- Pay Type Group
- Position
EPS Report

Before You Begin: This topic is for customers who use the UK Payroll feature.

The EPS Report topic contains data that you can use to generate the Employee Payment Summary information to send to HMRC.

The topic contains fields under the following query entities:

- Frequent Use
- GovTalk Error
- GovTalk Message
- GovTalk Response

Feature Role

The Feature Role topic contains all feature and role association information.

The topic contains fields under the following query entities:

- Feature
- Role

FPS Report

Before You Begin: This topic is for customers who use the UK Payroll feature.

The FPS Report topic contains data that you can use to generate the Full Payment Summary information to send to HMRC.

The topic contains fields under the following query entities:

- Frequent Use
- GovTalk Batch
- Pay Group

HR Compliance

The HR Compliance topic contains detailed personal information, work information, EEO information, and cumulative payroll data such as cumulative hours, earnings, and deduction register information. You can use this topic to report on your organization’s compliance in areas such as pay gap analysis and total compensation.

The topic contains fields under the following query entities:
• Department
• EEO Classification
• Employee Employment Status
• Employee Manager
• Employment Status
• Employment Status Group
• Entered Ethnicity Custom
• Job
• Legal Entity
• Location
• Location Hierarchy
• Pay Class
• Pay Grade
• Pay Group
• Pay Policy
• Pay Type
• Pay Type Group
• Payroll Register by Pay Run Custom
• Position

**HR Events**

This topic displays information about HR Events (such as a change to marital status or employment status) and any workflows that these events triggered.

The topic contains fields under the following query entities:

• Department
• Employee
• Employee Badge
• Employee Employment Status
• Employee Group
• Employee Work Assignment
• Employment Indicator
• Employment Status
• Employment Status Group
• Employment Status Reason
• HR Event
• HR Event Form
• HR Event Type
• HR Event Workflow
• Pay Class
• Pay Group
• Pay Type
• Position
• Workflow Data
• Workflow Data HR Event
HR Profile

The HR Profile topic contains detailed employee personal and work information. Effective dating is applied using a date range or a point in time.

The topic contains fields under the following query entities:

- Contact Information Type
- Department
- EEO Classification
- Employee
- Employee Employment Status
- Employee Ethnicity
- Employee Group
- Employee HR Policy
- Employee Manager
- Employee Marital Status
- Employee Union
- Employee Veterans Status
- Employee Work Assignment
- Employment Status
- Employment Status Group
- Employment Status Reason
- Ethnicity
- FLSA Status
- Geo City
- Geo Country
- HR Policy
- Job
- Job Family
- Location
- Marital Status
- Org Level
- Pay Class
- Pay Grade
- Pay Group
- Pay Policy
- Pay Type
- Pay Type Group
- Person Address
- Position
- Union
- Veterans Status
- Zone
HR Profile - As of Date

The HR Profile - As of Date topic contains detailed employee personal and work information to get accurate headcounts for a specified point in time using the As of Date parameter.

The topic contains fields under the following query entities:

- Contact Information Type
- Department
- EEO Classification
- Employee
- Employee Employment Status
- Employee Ethnicity
- Employee Group
- Employee HR Policy
- Employee Manager
- Employee Marital Status
- Employee Union
- Employee Veterans Status
- Employee Work Assignment
- Employment Status
- Employment Status Group
- Employment Status Reason
- Ethnicity
- FLSA Status
- Geo City
- Geo Country
- HR Policy
- Job
- Job Family
- Location
- Marital Status
- Org Level
- Pay Class
- Pay Grade
- Pay Group
- Pay Policy
- Pay Type
- Pay Type Group
- Person Address
- Position
- Union
- Veterans Status
- Zone
HR Profile - Current Contact Information

The HR Profile - Current Contact Information topic contains detailed employee personal and work information with all of the current contact information.

The topic contains fields under the following query entities:

- Current Emergency Contact
- Current Employee Contact
- Department
- EEO Classification
- Employee
- Employee Employment Status
- Employee Ethnicity
- Employee Group
- Employee HR Policy
- Employee Manager
- Employee Marital Status
- Employee Union
- Employee Veterans Status
- Employee Work Assignment
- Employment Status
- Employment Status Group
- Employment Status Reason
- Ethnicity
- FLSA Status
- Geo City
- Geo Country
- HR Policy
- Job
- Job Family
- Location
- Marital Status
- Org Level
- Pay Class
- Pay Grade
- Pay Group
- Pay Policy
- Pay Type
- Pay Type Group
- Position
- Union
- Veterans Status
- Zone
Job Configuration Data

The Job Configuration Data topic contains detailed job configuration information, including EEO category, FLSA status, job family and function, position data and pay class, type and grade. Does not include employee level detail.

The data returned by the Job Configuration Data report topic can generally be viewed on the Jobs and Positions tab of Org Setup.

The Job Configuration Data topic contains fields under the following groupings:

- Department
- EEO-1 Job Category
- Employment Indicator
- FLSA Status
- Job
- Job Family
- Job Function
- Pay Class
- Pay Grade
- Pay Type
- Position
- Position Term

Job Requisitions

The Job Requisitions topic includes information on job requisitions, job posting and job details.

The topic contains fields under the following groupings:

- Application Decline Reason
- Application Document
- Application Status
- Application Status Group
- Employment Indicator
- Geo City
- Industry
- Job
- Job Application Section
- Job Application Template
- Job Application Template Section
- Job Board
- Job Classification
- Job Family
- Job Function
- Job Posting
- Job Posting Application
New Hires

Before You Begin: This topic was removed from the Topic Builder in Release 54. You can continue to use and edit custom reports that were created using this topic before Release 54, but you can no longer use this topic to create new reports. The recommended replacement topic is HR Profile.

The New Hires topic contains employee new hire information for a specific hire date or date range based on the dates entered in the parameters. Work assignment and employment status fields display current data. For a point in time report, use the same date for the Start and End dates.

The New Hires topic contains fields under the following groupings:

- Department
- EEO Classification
- Employee
- Employee Employment Status
- Employee Ethnicity
- Employee Veterans Status
- Employee Work Assignment
- Employment Status
- Ethnicity
- FLSA Status
- Job
- Pay Class
- Pay Grade
• Pay Type
• Location
• Position
• Veterans Status

Onboarding Details

The Onboarding Details topic contains information about employee onboarding tasks, such as task name, task status, due date, and employee details. You can use this topic to report on information from the Onboarding feature in Dayforce.

The topic contains fields under the following query entities:

• Department
• Employee
• Employee Employment Status
• Employee Manager
• Employee Work Assignment
• Employment Status
• Employment Status Group
• Job
• Location
• Onboarding Policy
• Onboarding Task
• Position

Pay

The data contained in the Pay fields can be found in employees' timesheet records, which can be viewed through Timesheets > Pay.

The Pay topic also contains fields from the 'Employee' topic -- all but the emergency contact information fields -- so that employee data can be included in pay reports. For more information on these fields, refer to the 'Employee' topic.

The Pay topic contains fields under the following groupings:

• Department
• Docket
• Emergency Contacts
• Employee
• Employee Contact Information
• Employee Employment Status
• Employee Pay Summary
• Employee Work Assignment
• Employment Status
• Job
• Location
• Other
• Pay Adj Code
• Pay Category
• Pay Class
• Pay Type
• Position
• Project
• Shift Rotation

Pay Run - Cumulative Deduction Groupings

The Pay Run - Cumulative Deduction Groupings topic contains fields relating to deduction groupings over a set time period (Current, MTD, QTD, YTD).

The Pay Run - Cumulative Deduction Groupings topic contains fields under the following groupings:

• Check Detail
• Client Information
• Deduction Grouping
• Deductions
• Earnings
• Employee
• Employee Contact Information
• Employee Employment Status
• Employee Work Assignment
• Pay Run Detail
• Pay Type
• Taxes

Pay Run - Cumulative Deductions

The Pay Run - Cumulative Deductions topic contains fields relating to one or more deductions over a set time period (Current, MTD, QTD, YTD).

The Pay Run - Cumulative Deductions topic contains fields under the following groupings:

• Check Detail
• Client Information
• Deductions
• Earnings
• Employee
• Employee Contact Information
• Employee Employment Status
Pay Run - Cumulative Earning Groupings

The Pay Run - Cumulative Deductions topic contains fields relating to one or more earning groupings over a set time period (Current, MTD, QTD, YTD).

The Pay Run - Cumulative Deductions topic contains fields under the following groupings:

- Check Detail
- Client Information
- Deductions
- Earnings
- Employee
- Employee Contact Information
- Employee Employment Status
- Employee Work Assignment
- Pay Run Detail
- Pay Type
- Taxes

Pay Run - Cumulative Earnings

The Pay Run - Cumulative Earnings topic contains fields relating to one or more earnings over a set time period (Current, MTD, QTD, YTD).

The Pay Run - Cumulative Earnings topic contains fields under the following groupings:

- Check Detail
- Client Information
- Deductions
- Earnings
- Employee
- Employee Contact Information
- Employee Employment Status
- Employee Work Assignment
- Pay Run Detail
- Pay Type
- Taxes
Pay Run - Cumulative Earnings, Deductions, and Taxes

The Pay Run - Cumulative Earnings, Deductions, and Taxes topic contains fields relating to one or more earnings, deductions, or taxes over a set time period (Current, MTD, QTD, YTD).

The Pay Run - Cumulative Earnings, Deductions, and Taxes topic contains fields under the following groupings:

- Amount
- Check Detail
- Client Information
- Deductions
- Earnings
- Employee
- Employee Contact Information
- Employee Employment Status
- Employee Work Assignment
- Pay Run Detail
- Pay Type
- Taxes

Pay Run - Cumulative Results

The Pay Run - Cumulative Results topic contains fields relating to payments made to employees over a set time period (Current, MTD, QTD, YTD).

The Pay Run - Cumulative Results topic contains fields under the following groupings:

- Check Detail
- Client Information
- Deductions
- Earnings
- Employee
- Employee Contact Information
- Employee Employment Status
- Employee Work Assignment
- Pay Run Detail
- Pay Type
- Taxes

Pay Run - Cumulative Taxes

The Pay Run - Cumulative Taxes topic contains fields relating to one or more taxes over a set time period (Current, MTD, QTD, YTD).
The Pay Run - Cumulative Taxes topic contains fields under the following groupings:

- Check Detail
- Client Information
- Deductions
- Earnings
- Employee
- Employee Contact Information
- Employee Employment Status
- Employee Work Assignment
- Pay Run Detail
- Pay Type
- Taxes

**Pay Run - Deductions**

The Pay Run - Deductions topic contains fields relating to deductions taken in the loaded pay run.

The Pay Run - Deductions topic contains fields under the following groupings:

- Check Detail
- Client Information
- Deductions
- Earnings
- Employee
- Employee Contact Information
- Employee Employment Status
- Employee Work Assignment
- Pay Run Detail
- Pay Type
- Taxes

**Pay Run - Earning Limit Violations**

The Pay Run - Earning Limit Violations topic contains fields relating to earnings that have violated an earning limit.

The Pay Run - Earning Limit Violations topic contains fields under the following groupings:

- Check Detail
- Client Information
- Earnings
- Employee
Pay Run - Earnings

The Pay Run - Earnings topic contains fields relating to earnings taken in the loaded pay run.

The Pay Run - Earnings topic contains fields under the following groupings:

- Check Detail
- Client Information
- Deductions
- Earnings
- Employee
- Employee Contact Information
- Employee Employment Status
- Employee Work Assignment
- Limits
- Location
- Pay Run Detail
- Pay Type
- Taxes

Pay Run - Employee Address Changes

The Pay Run - Employee Address Changes topic contains fields relating to employee address changes that occurred within the loaded pay run.

The Pay Run - Employee Address Changes topic contains fields under the following groupings:

- Employee
- Employee Contact Information
- Other

Pay Run - Employee Deductions

The Pay Run - Employee Deductions topic contains fields relating to scheduled, calculated, and taken deduction amounts for deductions taken in the loaded pay run.

The Pay Run - Employee Deductions topic contains fields under the following groupings:

- Check Detail
- Client Information
- Deductions
- Employee
- Employee Work Assignment
- Pay Run Detail
Pay Run - Employee Details

The Pay Run - Employee Details topic contains fields relating to changes to employee details made within the loaded pay run.

The Pay Run - Employee Details topic contains fields under the following groupings:

- Check Detail
- Earnings
- Employee
- Employee Employment Status
- Employee Work Assignment
- Location
- Pay Run Detail
- Pay Type

Pay Run - Employee Missing Org

The Pay Run - Employee Missing Org topic contains fields relating to employees that do not have an org assignment. Org assignments are important in order to calculate taxes properly.

The Pay Run - Employee Missing Org topic contains fields under the following groupings:

- Employee
- Employee Work Assignment
- Pay Run Detail

Pay Run - Employee Org Details

The Pay Run - Employee Org Details topic contains fields relating to org unit assignments for the employees in the loaded pay run.

The Pay Run - Employee Org Details topic contains fields under the following groupings:

- Employee
- Employee Work Assignment

Pay Run - Employee Personal Details

The Pay Run - Employee Personal Details topic contains fields relating to address information for employees included in the loaded pay run.

The Pay Run - Employee Personal Details topic contains fields under the following groupings:

- Check Detail
Pay Run - Employee Taxes

The Pay Run - Employee Taxes topic contains fields relating to tax amounts taken in the loaded pay run.

The Pay Run - Employee Taxes topic contains fields under the following groupings:

- Check Detail
- Client Information
- Employee
- Employee Work Assignment
- Pay Run Detail
- Taxes

Pay Run - Garnishment

The Pay Run - Garnishment topic contains fields relating to garnishments taken in the loaded pay run.

The Pay Run - Garnishment topic contains fields under the following groupings:

- Check Detail
- Client Information
- Deductions
- Earnings
- Employee
- Employee Contact Information
- Employee Employment Status
- Employee Work Assignment
- Garnishment
- Pay Run Detail
- Pay Type
- Taxes
Pay Run - Hours Paid Difference between WFM and Payroll Mapping

The Pay Run - Hours Paid Difference between WFM and Payroll Mapping topic contains details about employees who have differences between their paid hours in WFM and their mapped hours in Payroll.

The topic contains fields under the following query entities:

- Benefit Elections
- Employee
- Employee Employment Status

Pay Run - Invalid SSN

The Pay Run - Invalid SSN topic contains fields relating to employees that have an invalid Social Security Number or Social Insurance Number.

The Pay Run - Invalid SSN topic contains fields under the following groupings:

- Employee
- Employee Work Assignment

Pay Run - Result

The Pay Run - Result topic contains fields relating to payments made to employees for the loaded pay run.

The Pay Run - Result topic contains fields under the following groupings:

- Check Detail
- Client Information
- Deductions
- Earnings
- Employee
- Taxes

Pay Run - Taxes

The Pay Run - Taxes topic contains fields relating to taxes taken in the loaded pay run.

The Pay Run - Taxes topic contains fields under the following groupings:

- Check Detail
Pay Run - Third Party Payments

The Pay Run - Third Party Payments topic contains fields relating to third party payees over a set time period (Current, MTD, QTD, YTD).

The Pay Run - Third Party Payments topic contains fields under the following groupings:

- Client Information
- Deductions
- Earnings
- Employee
- Employee Contact Information
- Employee Employment Status
- Employee Work Assignment
- Pay Run Detail
- Pay Type
- Taxes

Pay Run - UK Arrestment Payments

Before You Begin: This report is for customers who use the UK Payroll feature.

The Pay Run - UK Arrestment Payments topic contains data related to UK arrestment payments. This data comes from the UK Payroll feature.

The topic contains fields under the following query entities:

- Arrestment
- Client Information
- Employee
- Employee Contact Information
- Employee Employment Status
- Pay Run Detail
- Payee
Pay Run - Zero Dollar Checks

The Pay Run - Zero Dollar Checks topic contains fields relating to any employees that have received zero dollar checks in the loaded pay run.

The Pay Run - Zero Dollar Checks topic contains fields under the following groupings:

- Check Detail
- Client Information
- Employee
- Employee Work Assignment
- Pay Type

Pay Summary

The Pay Summary topic displays payroll data for employees, including how much employees earned, overtime hours, and pay categories.

The topic contains fields under the following query entities:

- Department
- Employee
- Employee Employment Status
- Employee Manager
- Employee Pay Summary
- Employee Punch
- Employee Schedule
- Employment Status
- Employment Status Group
- Job
- Location
- Pay Category
- Pay Category Group
- Pay Code
- Pay Group
- Pay Group Calendar
- Pay Type
- Position

Pay Wage Change

The Pay Wage Change topic contains details about pay wage changes made by the Employee Minimum Wage Update background job. You can use this topic to report on employees whose wage is below the minimum for their age bracket.

The topic contains fields under the following query entities:
Payroll - Deduction Details

The data returned by the Payroll - Deduction Details fields return information for employees on all processed payrolls and pay groups.

The Payroll - Deduction Details topic contains fields under the following groupings:

- Committed Pay Run Results
- Deductions
- Department
- Employee
- Employee Employment Status
- Employee Work Assignment
- Employment Status
- Job
- Location
- Pay Class
- Pay Group
- Pay Run Deduction Results
- Pay Run Details
- Pay Type
- Position

Payroll - Earnings and Hours Details

The data returned by the Payroll - Earnings and Hours Details fields return information on the hours and earnings information by earning type for all processed payrolls and pay groups. Create a filter to select specific pay period(s).

The Payroll - Earnings and Hours Details topic contains fields under the following groupings:

- Department
- Earning
- Earning Code
- Earning Type
• Employee
• Employment Status
• Job
• Location
• Pay Class
• Pay Group
• Pay Run Earning Committed
• Pay Run Result Committed
• Pay Run View
• Pay Type
• Position

Note: The Employee Employment Status query entity was removed from this topic in version 8.50. This may cause an error in custom reports based on this topic that were created in version 8.49 or earlier. If this error occurs, edit the report to remove any fields from this query entity.

Payroll - Pay Run Summary

The data returned by the Payroll - Pay Run Summary fields return information on employee, check summary, and check detail information for all processed payrolls and pay groups. Create a filter to select specific pay period(s).

The Payroll - Pay Run Summary topic contains fields under the following groupings:

• Committed Pay Run Results
• Department
• Employee
• Employment Status
• Job
• Legal Entity
• Location
• Pay Class
• Pay Run Check Type
• Pay Run Definition
• Pay Run Details
• Pay Type
• Position

Payroll - Tax Details

The data returned by the Payroll - Tax Details fields return information on detailed tax information for employees for all processed payrolls and pay groups. Create a filter to select specific pay period(s).
The Payroll Tax Authority, Payroll Tax Authority Instance, and Payroll Tax Category query entities provide useful filtering capabilities for reports created from this topic, such as the ability to compare Federal and State unemployment tax wages.

The Payroll - Tax Details topic contains fields under the following groupings:

- **Committed Pay Run Results.** These fields return information on earnings, deductions, tax, and net pay by date and employee for a committed payroll run.
- **Employee.** These fields return information on the employee to which the payroll tax was applied.
- **Employment Status.** These fields return information on the employee’s employment status.
- **Legal Entity.** These fields return information on the legal entity, such as the address.
- **Pay Class.** These fields return information on the pay class(es) configured in the application, in relation to the payroll tax applied.
- **Pay Run Check Type.** These fields return information on the check type(s) configured in the application, in relation to the payroll tax applied.
- **Pay Run Definition.** These fields return information on the pay run definition(s) configured in the application, in relation to the payroll tax applied.
- **Pay Run Details.** These fields return information on the pay run details for committed and not committed payrolls, in relation to the payroll taxes applied.
- **Pay Run Tax Permanent.** These fields return information on the tax amounts by pay date and employee for a committed payroll run.
- **Pay Type.** These fields return information on the pay types configured in the application, in relation to the payroll tax applied.
- **Payroll Tax Authority.** These fields return information on the payroll tax authorities configured in the application, in relation to the payroll tax applied.
- **Payroll Tax Authority Instance.** These fields return information on the payroll tax applied.
- **Payroll Tax Category.** These fields return information on the payroll taxes configured in the application, in relation to the payroll tax applied.
- **Payroll Taxes.** These fields return information on the payroll taxes applied.

**Payroll Register by Date Range**

The Payroll Register by Date Range topic contains payroll data summed over a date range; users can retrieve data such as cumulative hours, earnings and deduction register information. Administrators can use this topic to view payroll register data for a specified date range.

In order to fulfill auditing requirements, data in this topic reflect what was actually committed in pay runs. The data displayed in a payroll register report is determined by the persisted status of the latest pay run included in the report.

The topic contains fields under the following query entities:

- Department
- Employment Status
- Employment Status Group
- Job
• Legal Entity
• Location
• Location Hierarchy
• Pay Class
• Pay Group
• Pay Type
• Pay Type Group
• Payroll Register by Date Range Custom
• Position

Note: Many of the fields in this topic are protected by the Payroll Pay Run Result option in the Authorizations tab of System Admin > Roles. For more information on access authorization requirements for individual fields, see the Reporting Data Dictionary.

Payroll Register Record Type Field

This topic includes the Record Type field, which displays one of the following types for each record:

• Earning
• Deduction
• Tax
• Net
• Earning Grouping
• Deduction Grouping
• Deduction Arrears

The application includes all of these types of records in reports by default, except for earning groupings and deduction groupings. To include grouping type records in reports, an administrator must select the Include in Payroll Register checkbox in the Reporting Options tab in Payroll Setup > Earning Grouping. For more information, see the Payroll Administrator Guide.

Further, there are several fields in this topic that are specific to certain record types. These fields will be null for records that are other types. For example, the Earning Generated Flag field is specific to Earning type records. In Earning type records, the column displays “True” or “False”, while in other types of records, the column is empty.

Payroll Register by Pay Run

The Payroll Register by Pay Run topic contains cumulative payroll data. You can use this topic to report on data such as cumulative hours, earnings, and deduction register information. In order to fulfill auditing requirements, data in this topic reflect what was actually committed in pay runs. The data displayed in a payroll register report is determined by the persisted status of the latest pay run included in the report.
The topic contains fields under the following query entities:

- Department
- Employment Status
- Employment Status Group
- Job
- Legal Entity
- Location
- Pay Class
- Pay Group
- Pay Type
- Pay Type Group
- Payroll Register by Pay Run Custom
- Position

**Note:** Many of the fields in this topic are protected by the **Payroll Pay Run Result** option in the **Authorizations** tab of **System Admin > Roles**. For more information on access authorization requirements for individual fields, see the **Reporting Data Dictionary**.

### Totals in Payroll Register Reports

In this topic, there are two different types of fields with to-dates (month-to-date, quarter-to-date, and year-to-date): check fields and period fields. You cannot apply sum totals to check fields because they contain iterative cumulative amounts. Applying a sum to a check field would result in an overstated total. Period fields may be summed because they are not iterative. For more information, see the **Payroll Administrator Guide**.

### Performance - Historical Reviews

The Performance - Historical Reviews report topic contains information about employees’ past performance reviews. You can use it to create reports that display information about historical employee reviews.

The topic contains fields under the following query entities:

- Department
- Employee
- Employee Employment Status
- Employee Manager
- Employee Performance Rating View
- Employee Work Assignment
- Employment Status
- Employment Status Group
- Job
- Location
- Performance Cycle
- Performance Rating
Performance Competencies

The Performance Competencies topic contains competency details with assignment and the latest ratings.

The topic contains fields under the following query entities:

- Department
- Employee
- Employee Employment Status
- Employee Manager
- Employee Review Competency View
- Employee Work Assignment
- Employment Status
- Employment Status Group
- Employment Status Reason
- Job
- Location
- Position

Performance Conversations

The Performance Conversations topic contains summaries of employee conversations, including the date and time that conversations were created.

The topic contains fields under the following query entities:

- Conversations Category
- Department
- Employee
- Employee Employment Status
- Employee Manager
- Employee Work Assignment
- Employment Status
- Employment Status Group
- Employment Status Reason
- Job
- Location
- Performance Conversation Custom View
- Position
Performance Goals

The Performance Goals topic displays information about goals configured in the Performance module, including employee assignment.

The topic contains fields under the following query entities:

- Department
- Employee
- Employee Manager
- Employee Work Assignment
- Job
- Location
- Performance Employee Goal
- Performance Employee Goal Progress
- Performance Goal
- Performance Goal Category
- Position

Performance Review

The Performance Review topic contains information about employee performance reviews including review cycle, status, and rating information.

The topic contains fields under the following query entities:

- App User Employee
- Department
- Employee
- Employee Employment Status
- Employee Manager
- Employee Review Cycle View
- Employee Work Assignment
- Job
- Location
- Performance Review Cycle
- Performance Review Status Custom
- Position

Performance Review - Additional Questions

The Performance Review - Additional Questions topic contains the responses that employees and managers provide to the additional questions on the review form. You can use this topic to report on all of the ratings and comments for individual additional questions within the review form for a team or for individual employees.
The topic contains fields under the following query entities:

- App User Employee
- Department
- Employee
- Employee Employment Status
- Employee Manager
- Employee Review Cycle View
- Employee Review Questions View
- Employee Work Assignment
- Employment Status
- Employment Status Group
- Job
- Location
- Performance Employee Review Cycle
- Performance Question
- Performance Review Cycle
- Position

**Policy Acknowledgement**

The Policy Acknowledgement topic contains detailed employee personal, work, and policy acknowledgement information. You can use this topic to report on the HR policies that are assigned to employees, and to see whether the employees have signed off on them.

The topic contains fields under the following query entities:

- Contact Information Type
- Department
- EEO Classification
- Employee
- Employee Employment Status
- Employee Ethnicity
- Employee Group
- Employee HR Policy Custom
- Employee Manager
- Employee Marital Status
- Employee Union
- Employee Veterans Status
- Employee Work Assignment
- Employment Status
- Employment Status Group
- Employment Status Reason
- Ethnicity
- FLSA Status
- Geo City
- Geo Country
- HR Policy
Position Management

This topic displays information necessary to manage positions, such as position names, position assignment, and budgeted headcount.

The topic contains fields under the following query entities:

- Department
- Employee
- Employee Employment Status
- Employee Work Assignment
- Employment Status
- Job
- Location
- Pay Class
- Pay Group
- Pay Type
- Position
- Position Assignment
- Position Headcount

Affordable Care Act - WFM

The Affordable Care Act -WFM topic includes information on employee net hours based on workforce management data to support reporting for the Patient Protection and Affordable Care Act. Use the business start and end date parameters to define the measurement period.

The topic contains fields under the following query entities:
Productivity (Schedule vs. Actual)

The Productivity (Schedule vs. Actual) topic allows for the comparison between scheduled time and the actual time captured for employees (recorded through time punches); analysis can be performed on where employees were assigned to work, which job and department at which location, an employee’s employment status and pay at the time, and what the employee’s schedule entailed versus what the punched time committed against it.

The Productivity (Schedule vs. Actual) topic contains fields under the following groupings:

- Department
- Emergency Contacts
- Employee
- Employee Contact Information
- Employee Employment Status
- Employee Pay Summary
- Employee Schedule
- Employee Work Assignment
- Job
- Location
- Punch
- Shift Rotation

Productivity (Schedule vs. Actual) With Start and End Date Filters

The Productivity (Schedule vs. Actual) With Start and End Date Filters topic contains scheduled times and actual times that were recorded through time punches for employees. You can use it to compare employees’ schedule time against the punched time committed against it.

The topic contains fields under the following query entities:

- Department
- Emergency Contacts
- Employee
- Employee Contact Information
- Employee Employment Status
• Employee Pay Summary
• Employee Schedule
• Employee Work Assignment
• Job
• Location
• Punch
• Shift Rotation

**Punch**

The data contained in the Punch fields can be found in employees' timesheet records, which can be viewed through **Timesheets > Pay**.

The Punch topic contains fields under the following groupings:

- Department
- Docket
- Emergency Contacts
- Employee
- Employee Contact Information
- Employee Employment Status
- Employee Work Assignment
- Job
- Punch

**Punch Exception**

The Punch Exception topic contains non-tardy punch details, including employee schedules, employee punch records, and considered exceptions.

The topic contains fields under the following query entities:

- Department
- Employee
- Employee Employment Status
- Employee Manager
- Job
- Location
- Pay Class
- Pay Group
- Pay Group Calendar
- Position
- Punch Exceptions Custom
Recruiting

The Recruiting topic contains candidate profile, job requisition, and candidate application information.

The topic contains fields under the following query entities:

- Affiliation
- Application Decline Reason
- Application Status
- Application Status Group
- Candidate
- Candidate Document
- Candidate Link
- Candidate Link Type
- Candidate Profile
- Candidate Reference
- Candidate Training
- Certification
- Company
- Degree
- Education Concentration
- Education History
- Employee
- Employee Employment Status
- Employment Indicator
- Employment Status
- Employment Status Group
- Geo City
- Industry
- Job
- Job Application Section
- Job Application Source
- Job Application Template
- Job Board
- Job Classification
- Job Family
- Job Function
- Job Posting
- Job Posting Application
- Job Posting Application Status
- Job Posting Classification
- Job Posting Education
- Job Posting Geo City
- Job Requisition
- Job Requisition Activity Log
- Job Requisition Justification
- Job Requisition Reason
The Safety and Health Incidents topic includes HR Incident data, by employee and job information. The topic includes information returned by the OSHA 300, OSHA 300A, and OSHA 301 reports, and can be filtered to return only OSHA reportable incidents, or all HR safety and health incidents.

The Safety and Health Incidents topic contains fields under the following groupings:

- Department
- Employee
- Employee Employment Status
- Employee HR Event
- Employee HR Incident
- Employee Manager
- Employee Work Assignment
- Employment Status
- HR Incident Action
- HR Incident Body Part
- HR Incident Group
- HR Incident Injury
- HR Incident Type
- Job
- Location
- Position
- Safety Health Type
Schedule

The data contained in the Schedule fields can be found in the employee information contained in Schedules.

The Schedule topic contains fields under the following groupings:

- Activity
- Department
- Emergency Contacts
- Employee
- Employee Contact Information
- Employee Employment Status
- Employee Schedule
- Employee Work Assignment
- Job

Schedule Changes

The Schedule Changes topic displays changes to schedules that were made during or close to the start of a shift, including the schedule, employee, and manager information.

The topic contains fields under the following query entities:

- App User Employee
- Department
- Employee
- Employee Schedule
- Job
- Location
- On Call Status
- Position
- Schedule Change Reason
- Schedule Changes Shortly Before Shift

Schedule Changes Audit

The Schedule Changes topic displays changes to schedules that were made during or close to the start of a shift, including the schedule, employee, and manager information.

The topic contains fields under the following query entities:

- App User Employee
- Department
- Employee
- Employee Schedule
• Job
• Location
• On Call Status
• Position
• Schedule Change Reason
• Schedule Changes Shortly Before Shift Audit

**Shift Trade**

The data contained in the Shift Trade fields can be found in the Shift Trades panel in Schedules and the shift trade slide-out panel in Work > Calendar.

The Shift Trade topic contains fields under the following groupings:

- Employee
- Employee Contact Information
- Employee Employment Status
- Employee Schedule
- Employment Status
- Partial Shift
- Requested Department
- Requested Job
- Schedule Department
- Schedule Job

**Terminated Employees**

**Before You Begin:** This topic was removed from the Topic Builder in Release 54. You can continue to use and edit custom reports that were created using this topic before Release 54, but you can no longer use this topic to create new reports. The recommended replacement topic is HR Profile.

The Terminated Employees topic returns information on employees that were terminated during the date range entered on the report parameters; to configure a point in time report, the same date should be entered on the Termination Start Date and Termination End Date parameters.

The topic contains fields under the following query entities:

- Department
- EEO Classification
- Employee
- Employee Badge
- Employee Employment Status
- Employee Ethnicity
- Employee Manager
- Employee Marital Status
- Employee Performance Rating
- Employee Union
- Employee Veterans Status
- Employee Work Assignment
- Employment Status
- Employment Status Group
- Employment Status Reason
- Ethnicity
- Job
- Location
- Marital Status
- Pay Class
- Pay Grade
- Pay Group
- Pay Type
- Performance Rating
- Position
- Union
- Veterans Status

**Third Party Manual Employee Payments**

The Third Party Manual Employee Payments topic contains data about third-party manual employee payments.

The topic contains fields under the following query entities:

- Frequent Use
- Legal Entity
- Pay Run
- Payment Details

**Time Away From Work**

The data contained in the Time Away From Work fields contains information on employees' time off requests, which can be found predominantly in **My Day > Time Off Request Manager**.

The Time Away From Work topic contains fields under the following groupings:

- Department
- Employee
- Employee Contact Information
- Employee Employment Status
- Employee TAFW
- Employee Work Assignment
- Job
• Pay Adj Code
• TAFW Status

Timesheets

The Timesheets topic contains employee and timesheet data, including raw punch time, actual punch time, and employee and manager comments.

The topic contains fields under the following query entities:

• Department
• Employee
• Employee Employment Status
• Employee Manager
• Employee Pay Summary
• Employee Punch
• Employment Status
• Employment Status Group
• Job
• Location
• Pay Group
• Position

Unauthorized Period

The Unauthorized Period topic contains information about period authorization such as punch details, pay category, and pay type.

The topic contains fields under the following query entities:

• App User Employee
• Department
• Employee
• Employee Employment Status
• Employee Manager
• Employee Pay Summary
• Employee Punch
• Employee Schedule
• Employment Status
• Employment Status Group
• Job
• Location
• Pay Category
• Pay Category Group
• Pay Code
• Pay Group
Unauthorized Records

The Unauthorized Records topic displays pay data from employee timesheets, such as hours worked, unscheduled shifts, and records that have not been authorized by a manager and/or employee.

The topic contains fields under the following query entities:

- Department
- Employee
- Employee Employment Status
- Employee Manager
- Employee Pay Summary
- Employee Punch
- Employee Schedule
- Employment Status
- Employment Status Group
- Job
- Labor Metrics Code 0-9
- Labor Metrics Type 0-9
- Location
- Pay Category
- Pay Category Group
- Pay Code
- Pay Group
- Pay Group Calendar
- Pay Type
- Position
- Zone

Veteran Status

The data returned by the Veteran Status topic includes information on detailed employee veteran status information, including employees with no veteran status. Create a filter to designate specific veteran status parameters.

The Veteran Status topic contains fields under the following groupings:

- Contact Information Type
- Department
- EEO-1 Job Category
Vietnam Era Veterans Readjustment Assistance Act - VEVRAA

The Vietnam Era Veterans Readjustment Assistance Act - VEVRAA topic contains demographic, job, application, and questionnaire information for candidates and employees that can be used to report on data related to the Act.

The topic contains fields under the following query entities:

- Candidate
- Candidate Profile
- Department
- Employee
- Employee Employment Status
- Employment Status
- Employment Status Group
- Job
- Job Application Source
- Job Family
- Job Posting Application
- Job Posting Application Status
- Job Requisition
- Location
- Pay Grade
- Person Address
- Position
- Questionnaire Response VEVRAA Custom

Web Services Notification Log

The Web Services Notification Log topic contains details about Web Services notification subscriptions.
The topic contains fields under the following query entities:

- Web Services Notification Data
- Web Services Notification Event Subscription
- Web Services Notification Event Subscription Group
- Web Services Notification Event Type
- Web Services Notification Fulfillment
- Web Services Notification Fulfillment Status
- Web Services Notification Log
- Web Services Notification Subscriber

**Workers Compensation**

The Workers Compensation topic displays details about which employees are receiving workers compensation. The data returned this report topic can generally be viewed on an employee's record on **My HR**.

The Workers Compensation topic contains fields under the following groupings:

- Department
- Employee
- Employee Badge
- Job
- Legal Entity
- Pay Group
- Position
- Workers Compensation

**Workflow Details**

The Workflow Details topic contains detailed information about workflow forms.

The topic contains fields under the following query entities:

- App User Employee
- Employee
- Employee Manager
- Form Reviewer Custom
- Form Template
- Workflow Data
- Workflow Node
- Workflow Node Data
- Workflow Node State Type
- Workflow Node Type
- Workflow Status
- Workflow Template
- Workflow Type
Report Library

The Reporting feature comes with a report library, which contains a suite of pre-configured report templates. You can run these system reports as they are or use them as templates to create custom reports that suit your organization’s needs.

This section of the guide contains detailed information about each template in the report library. The reports are organized into sub-sections that correspond to the categories in Reporting > Reports. For each report, there is a brief description, a list of the fields it contains, and a screenshot of its filters.

To search for reports in this guide, you can do one of the following:

- If you want more information about a particular report, you can find it by searching in this document for the report name or browsing in the report’s category.
- If you need to find a report that contains a particular field, you can search this document for the field name.
- If you want to browse for a report about a particular topic, you could browse the categories to find an appropriate template.

Admin Reports

The Admin category contains reports that administrators use to view information about the application. It contains reports about billing, user roles, and workflows. The data for these reports comes from the System Admin feature, employee self-service forms, and the Workflow Administration feature.

Miscellaneous

The Admin > Miscellaneous category contains assorted administrative reports that can be used by administrators to generate data about the application.
Billing - Employee PEPM Detail

The Billing - Employee PEPM Detail report template uses the Employee PEPM Detail Billing topic to display billing details related to per employee per month (PEPM) billing. The report includes details such as billing date, legal entity, funding identifiers, and billing category information. The report displays one record per employee per billing generation date.

**Note**: Although the PEPM billing report template is available to all clients in Reporting > Reports, the report only returns data for clients who are participating in the Dayforce Billing Pilot. The template displays only information related to PEPM billing.

**Fields**

This template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billing Gen Date</td>
<td></td>
<td>Newest to Oldest</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Pay Group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Group ID</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PSID</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Funding ID</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status Group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rule A - Paid</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rule B - Using WFM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rule C - Connect Pay HR</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rule D - Pensioner</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Category Reference</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Rule A - Paid**

The **Rule A - Paid** custom field indicates whether the employee was paid in Dayforce in the previous 30 days. It uses the following expression:

```
Case WHEN (BillingPEPMDetail.RuleA = 'True') THEN 1 ELSE 0 END
```

**Rule B - Using WFM**
The **Rule B - Using WFM** custom field indicates whether the employee used Dayforce WFM features in the previous 30 days. It uses the following expression:

```sql
Case WHEN (BillingPEPMDetail.RuleB = 'True') THEN 1 ELSE 0 END
```

**Rule C - Connect Pay HR**

The **Rule C - Connect Pay HR** custom field indicates whether the employee was in a pay group that is configured for use with Connected Pay in the previous 30 days. It uses the following expression:

```sql
Case WHEN (BillingPEPMDetail.RuleC = 'True') THEN 1 ELSE 0 END
```

**Rule D - Pensioner**

The **Rule D - Pensioner** custom field indicates whether the employee had an employment type of pensioner in the previous 30 days. It uses the following expression:

```sql
Case WHEN (BillingPEPMDetail.RuleD = 'True') THEN 1 ELSE 0 END
```

**Filters**

This template includes the following filters:

```
And Billing Gen Date Greater Than Equal *
And Billing Gen Date Less Than Equal
```

**Personal Data Management**

The **Admin > Personal Data Management** category contains reports that support the process of identifying which personal data retention policies are associated with the people in your organization, and then reviewing which data will be deleted. For more information, see "Personal Data Management" in the *Dayforce Implementation Guide*.

**Candidate Data Minimization Activity**

The Candidate Data Minimization Activity report uses the topic by the same name to display historical or upcoming data minimization activity information for candidate data. For more information, see "Personal Data Management in the *Dayforce Implementation Guide*.

**Fields**

This template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Candidate Detail for Personal Data Management Policy Association

The Candidate Detail for Personal Data Management Policy Association report uses the topic by the same name to display effective-dated demographic information used to determine which personal data management policies to apply to candidates. For more information, see "Personal Data Management in the Dayforce Implementation Guide."
Fields

This template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact Last Modified Timestamp</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Deactivated</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Primary Residence Country Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior Primary Residence Country Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data Management Country Code</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

This template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Period: Between</td>
</tr>
<tr>
<td>* 4/20/2018</td>
</tr>
<tr>
<td>And Candidate: Contains</td>
</tr>
<tr>
<td>And Is Deactivated: Equal</td>
</tr>
<tr>
<td>And Contact Type Reference code: Equal</td>
</tr>
<tr>
<td>* PrimaryResidence</td>
</tr>
</tbody>
</table>

Employee Data Minimization Activity

The Employee Data Minimization Activity report uses the topic by the same name to display historical or upcoming data minimization activity information for employee data. For more information, see "Personal Data Management in the Dayforce Implementation Guide.

Fields

This template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Name Number</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employment Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Run Mode</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------</td>
<td>-----------</td>
<td></td>
</tr>
<tr>
<td>Run Date UTC</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Impact on Person</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Policy Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Policy Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retention Value</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retention Period</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retention Threshold UTC</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Policy Activity</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

This template includes the following filters:
Employee Detail for Personal Data Management Policy Association

The Employee Detail for Personal Data Management Policy Association report uses the topic by the same name to display effective-dated demographic information used to determine which personal data management policies to apply to employees. For more information, see "Personal Data Management in the Dayforce Implementation Guide."
Fields

This template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee Reference Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data Management Employment Status Group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Primary Residence Country Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Pay Group Country Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior Primary Residence Country Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior Pay Group Country Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data Management Country Code</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

This template includes the following filters:
User and Roles

The User & Roles category contains reports about the user roles in your organization, including users that are assigned to each role, and the permissions that are granted to each role. The data for these reports comes from the System Admin feature.

Access Authorizations by Role

The Access Authorizations by Role report uses the Access Authorizations topic to display a list of user roles with their create, read, update, and delete access authorization information.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
</table>

0 Selected

0 Selected

0 Selected

0 Selected

0 Selected

0 Selected

0 Selected
<table>
<thead>
<tr>
<th>Role</th>
<th>Yes</th>
<th>Ascending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Authorization</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Can Create</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can Read</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can Update</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can Delete</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Can Create**

The **Can Create** field displays “Yes” or “No” depending on the user’s create access. It uses the following expression:

```
CASE WHEN RoleAccessAuthorization.CanCreate = 1 THEN 'Yes' ELSE 'No' END
```

**Can Read**

The **Can Read** field displays “Yes” or “No” depending on the user’s read access. It uses the following expression:

```
CASE WHEN RoleAccessAuthorization.CanRead = 1 THEN 'Yes' ELSE 'No' END
```

**Can Update**

The **Can Update** field displays “Yes” or “No” depending on the user’s update access. It uses the following expression:

```
CASE WHEN RoleAccessAuthorization.CanUpdate = 1 THEN 'Yes' ELSE 'No' END
```

**Can Delete**

The **Can Delete** field displays “Yes” or “No” depending on the user’s delete access. It uses the following expression:

```
CASE WHEN RoleAccessAuthorization.CanDelete = 1 THEN 'Yes' ELSE 'No' END
```

**Filters**

The template contains the following filters:
Employee by Role

The Employee by Role report uses the Employee User Role topic to display a list of all of the employees that are assigned to each user role in the organization.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Default Role</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Default Role

The Default Role field displays the role that is on by default for the employee. It uses the following expression:

```
CASE WHEN EmployeeRoleView.IsDefault = 1 THEN 'Yes' ELSE 'No' END
```

Filters

The template includes the following filters:

And Role Access Authorization Can Create Not Equal False
Or Role Access Authorization Can Delete Not Equal False
Or Role Access Authorization Can Read Not Equal False
Or Role Access Authorization Can Update Not Equal False
And Role In Please select a value
Filter by Role

The Feature by Role report uses the Feature Role topic to display a list of user roles with their assigned access to features in the application. The report records are grouped by each level of features so that you can view the features and sub-features that are assigned to each role.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Parent Feature</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Child level 1</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Child Level 2</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Child Level 3</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Child Level 4</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Child Level 5</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:

And Role In Please select a value
Feature by Role - Details

The Feature by Role - Details report uses the Feature Role topic to display a list of user roles with their assigned access to features in the application. The records in this report are only grouped by role so that all of the parent feature and child feature details are displayed for each record.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Parent Feature</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Child level 1</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Child Level 2</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Child Level 3</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Child Level 4</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Child Level 5</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:

Role by Feature

The Role by Feature report uses the Feature Role topic to display a list of features and sub-features and the user roles that are assigned access to them. The records are grouped by parent feature.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Feature</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Child Level 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Child Level 2</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Role by Location and Employee

The Role by Location and Employee report uses the Employee User Role topic to display a list of the roles that are assigned to each employee, with the records grouped by location and then by employee.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Role</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Default Role</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Default Role

The Default Role field displays the role that is on by default for the employee. It uses the following expression:

```
    CASE WHEN EmployeeRoleView.IsDefault = 1 THEN 'Yes' ELSE 'No' END
```

Filters

The template includes the following filters:
User by Role

The User by Role report uses the Employee User Role topic to display a list of user roles with the users who are assigned to them.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Default Role</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>User</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Default Role

The Default Role field displays the role that is on by default for the employee. It uses the following expression:

```sql
CASE WHEN EmployeeRoleView.IsDefault = 1 THEN 'Yes' ELSE 'No' END
```

Filters

The template includes the following filters:
The Workflows category contains reports about your organization's workflows and the forms associated with them. It uses data from employee self-service forms and the Workflow Administration feature.

Open Workflows

The Open Workflows report uses the Workflow Details topic to display a list of open workflows and their associated forms. It includes information about the submitter, affected employees, and the workflow steps. By default, the report is filtered to display workflows that were initiated in the last 30 days.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workflow</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reviewer/Approver</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Affected Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submitter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Step</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initiated Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Execution Time in Days</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Custom Fields**

**Submitter**

The **Submitter** field displays the name of the user who submitted the form associated with the workflow. It uses the following expression:

\[ \text{COALESCE (AppUserEmployee.DisplayName, AppUserEmployee.LoginId)} \]

**Execution Time in Days**

The **Execution Time in Days** field displays the number of days the workflow has been in the review and approval process. It uses the following expression:

\[ \text{DATEDIFF(dd, DFWorkflowData.CreatedDate, GETDATE())} \]

**Filters**

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
</tr>
</thead>
<tbody>
<tr>
<td>And Workflow Status Name Contains Open</td>
</tr>
<tr>
<td>And Initiated Date Within Last 30 Days Including Today</td>
</tr>
<tr>
<td>And Form In Please select a value</td>
</tr>
<tr>
<td>And Reviewer/Approver Contains</td>
</tr>
<tr>
<td>And Affected Employee Contains</td>
</tr>
<tr>
<td>And Submitter Contains</td>
</tr>
</tbody>
</table>

**Workflows by Status**

The Workflows by Status report uses the Workflow Details topic to display workflows and their associated forms, with information such as submitter, affected employee, and step information. By default, the report is filtered to display workflows that were initiated in the last 30 days.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflow Status</td>
<td>Yes</td>
<td>Z to A</td>
<td></td>
</tr>
<tr>
<td>Form</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Submitter</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Affected Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Workflow</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
</tbody>
</table>
Custom Fields

Submitter

The **Submitter** field displays the name of the user who submitted the form associated with the workflow. It uses the following expression:

\[
\text{COALESCE (AppUserEmployee.DisplayName, AppUserEmployee.LoginId)}
\]

Execution Time in Days

The **Execution Time in Days** field displays the number of days the workflow has been in the review and approval process. It uses the following expression:

\[
\text{DATEDIFF(dd, DFWorkflowData.CreatedDate, GETDATE())}
\]

Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>And Initiator</td>
<td>Contains</td>
</tr>
<tr>
<td>And Form</td>
<td>In</td>
</tr>
<tr>
<td>And Workflow</td>
<td>In</td>
</tr>
<tr>
<td>And Reviewer</td>
<td>Contains</td>
</tr>
<tr>
<td>And Affected</td>
<td>Contains</td>
</tr>
<tr>
<td>And Submitter</td>
<td>Contains</td>
</tr>
</tbody>
</table>

Workflows by Status for New Hires

The Workflows by Status for New Hires report uses the Workflow Details topic to display the workflow statuses of workflows associated with forms submitted by new hires. It contains details such as submitter, affected employee, current step, initiated date, and hire date.

Fields

The template includes the following fields:
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflow Status</td>
<td>Yes</td>
<td>Z to A</td>
<td></td>
</tr>
<tr>
<td>Form</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Submitter</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Affected Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Workflow</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Current Step</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initiated Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Submitter**

The **Submitter** field displays the name of the user who submitted the form associated with the workflow. It uses the following expression:

\[
\text{COALESCE (AppUserEmployee.DisplayName, AppUserEmployee.LoginId)}
\]

**Filters**

The template includes the following filters:

Filters

<table>
<thead>
<tr>
<th>And</th>
<th>Hire Date</th>
<th>Within</th>
<th>Last 90 Days Including Today ▼</th>
</tr>
</thead>
<tbody>
<tr>
<td>And</td>
<td>Workflow Status</td>
<td>Contains</td>
<td>0 Selected</td>
</tr>
<tr>
<td>And</td>
<td>Form</td>
<td>In</td>
<td>Please select a value ▼</td>
</tr>
<tr>
<td>And</td>
<td>Submitter</td>
<td>Contains</td>
<td>0 Selected</td>
</tr>
<tr>
<td>And</td>
<td>Affected Employee</td>
<td>Contains</td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Workflow</td>
<td>In</td>
<td>Please select a value ▼</td>
</tr>
</tbody>
</table>

**Benefits Reports**

The **Benefits** category contains reports that can be used by benefits administrators. The data for these reports comes from the **Benefits** module of the application, including the **Benefits Management**, **Benefits**, and **PPACA** features.
Elections

The **Benefits > Elections** category contains reports about employee benefits elections. Benefits administrators can use these reports to view information about benefits coverage for employees and their dependents, elected plans and options, and coverage changes. The data in these reports comes from the **Benefits** feature.

**Benefit Coverage Ending for Selected Plans**

The Benefit Coverage Ending for Selected Plans report is a variation of the Employees with Benefit Coverage Ending template. It uses the Employee Benefits Coverage End topic to display a list of employees with benefit coverage ending during a specific date range, for specified plans.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coverage End Event</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Plan</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Option</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Dep. Age (yrs)</td>
<td></td>
<td>Smallest to Largest</td>
<td></td>
</tr>
<tr>
<td>Current Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Termination Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Modified</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coverage Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coverage End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dependent Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relationship</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep. Birth Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep. Effective Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep. Effective End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep. Last Modified</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep. Coverage Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep. Coverage End</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Custom Fields

Current Status

The **Current Status** custom field displays the employment status. It uses the following expression:

```
CASE WHEN
  (EmployeeEmploymentStatus.EffectiveStart <= Getdate() 
  and (EmployeeEmploymentStatus.EffectiveEnd >= Getdate() 
  or EmployeeEmploymentStatus.EffectiveEnd is null))
THEN EmploymentStatus.LongName
ELSE 'not current status'
END
```

Last Modified

The **Last Modified** custom field displays the last modified time. It uses the following expression:

```
BenPlanEmployeeElectedOption.LastModifiedTimeStamp
```

Dependent Name

The **Dependent Name** custom field displays the dependent's name. It uses the following expression:

```
EmployeeDependentBeneficiary.FirstName + ' ' + 
EmployeeDependentBeneficiary.LastName
```

Dep. Age (yrs)

The **Dep. Age (yrs)** custom field displays the dependent's age. It uses the following expression:

```
DATEDIFF(year, EmployeeDependentBeneficiary.BirthDate, GETDATE())
```

Dep. Coverage Start

The **Dep. Coverage Start** custom field displays the dependent's coverage start date. It uses the following expression:

```
BenPlanEmployeeDependentElectedOption.CoverageStart
```

Dep. Coverage End

The **Dep. Coverage End** custom field displays the dependent's coverage end date. It uses the following expression:

```
BenPlanEmployeeDependentElectedOption.CoverageEnd
```

Filters

The template includes the following filters:
Benefit Election Changes

The Benefit Election Changes report uses the Benefit Management Audit topic to display information about changes that have been made to employee benefit elections including cost, elected options, and benefits that have ended.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Name</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Change Date/Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Option Effective Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Option Effective End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Option</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plan Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plan Sub Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Frequency-Based Employee Cost</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Frequency-Based Employer Cost</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------------</td>
<td>----------</td>
<td>----------</td>
<td></td>
</tr>
<tr>
<td>Annual Employee Cost</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Employer Cost</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contribution Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contribution Percentage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Elected Option Coverage Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Change Date/Time**

The **Change Date/Time** field displays the date and time that the employee elected option was modified. It uses the following expression:

`BenPlanEmployeeElectedOption.LastModifiedTimestamp`

**Filters**

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>* 1/13/2017</td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Ben Plan Employee Elected Option Is Deleted</td>
<td>Equal</td>
<td>False</td>
</tr>
<tr>
<td>And Employee Elected Option Change Date Greater Than Equal</td>
<td>@StartDate</td>
<td></td>
</tr>
<tr>
<td>And Employee Elected Option Change Date Less Than Equal</td>
<td>@EndDate</td>
<td></td>
</tr>
<tr>
<td>And Employee Name In</td>
<td></td>
<td>Please select a value</td>
</tr>
</tbody>
</table>

**Benefit Election Changes for Selected Plans**

This template is a variation of the existing Benefit Election Changes template, and it uses the Benefit Management Audit topic. It allows you to report on changes for specified plan carriers, plan types, sub-types, options, or employees.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carrier</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Custom Fields</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>--------------</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Change Date/Time**

The **Change Date/Time** field displays the date and time that the employee elected option was modified. It uses the following expression:

```
BenPlanEmployeeElectedOption.LastModifiedTimestamp
```

**Filters**

The template includes the following filters:
Benefit Employees with Override

The Benefit Employees with Override report uses the Benefit Management Audit topic to display employees who have cost or coverage amounts that are flagged as "Override." The "Override" flag means that the amounts will not be affected by a recalculation unless the employee becomes ineligible for the plan option.

The report displays data about benefit elections, including effective start and end dates, amount paid by employee and employer, and coverage amounts.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Name</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Option Effective Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Option Effective End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Option</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plan Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Override Indicator</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Coverage Amount
Guaranteed Coverage Amount
Requested Coverage Amount
EOI Status
Frequency-Based Employee Cost
Frequency-Based Employer Cost
Annual Employee Cost
Annual Employer Cost
Contribution Amount
Contribution Percentage

Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Field</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Ben Plan Employee Elected Opt... Equal</td>
<td>False</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Option Effective Start Less Than Equal @End Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Option Effective End Greater Than @StartDate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Option Effective Start Not Equal Option Effective End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Override Indicator Equal * True</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Employee Name In Please select a value</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Benefit Employees with Pending EOI Status

The Benefit Employees with Pending EOI Status report uses the Benefit Management Audit topic to display a list of employee plan options that are waiting for EOI approval. It contains information about employees and their coverage options, including option effective start and end, employee and employer amounts, requested, actual, and guaranteed coverage amount.

Fields

The template includes the following fields:
The template includes the following filters:

**Carrier List Bill - Basic Life and ADD Plans**

The Carrier List Bill - Basic Life and ADD Plans report uses the Carrier List Bill topic to generate a carrier list bill for company-provided life and disability plans. The **ER Total Cost** column in the report displays the total cost for each plan option based on the total volume of coverage multiplied by the employer monthly rate and then divided by 1,000.

**Fields**

This template includes the following fields:
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carrier</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Plan Option</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rate Qualifier</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ER Monthly Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Covered Lives</td>
<td></td>
<td>Count</td>
<td></td>
</tr>
<tr>
<td>Volume</td>
<td></td>
<td>Sum</td>
<td></td>
</tr>
<tr>
<td>ER Total Cost</td>
<td></td>
<td>Sum</td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**ER Total Cost**

The **ER Total Cost** custom field displays the total cost for each plan option based on the total volume of coverage multiplied by the employer monthly rate and then divided by 1,000. It uses the following expression:

\[
\frac{(\text{BenPlanEmployeeElectedOption.CoverageAmount} \times \text{BenPlanOptionRateValue.EmployerCost})}{1000}
\]

**Filters**

This template includes the following filters:

- **Time Period**
  - As of

- Employment Status Group Name
  - In
    - Active
    - Inactive
    - Terminated

- Is Auto Enrolled
  - Equal
    - True

- Ben Plan Sub Type Reference Code
  - Contains
    - BASIC

- Employee Elected Option Rate Employee...
  - Equal
    - 0.00

**Carrier List Bill - Disability Plans**

The Carrier List Bill - Disability Plans report uses the Carrier List Bill topic to generate a carrier list for disability plans. The **EE Total** column in the report displays the employee monthly rate multiplied by the total number of employees covered by each plan option. The **ER Total** column displays the employee monthly rate multiplied by the total volume then divided by 1,000.
Fields

This template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carrier</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Plan Option</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Rate Qualifier</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EE Monthly Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ER Monthly Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Covered Lives</td>
<td></td>
<td></td>
<td>Count</td>
</tr>
<tr>
<td>Volume</td>
<td></td>
<td></td>
<td>Sum</td>
</tr>
<tr>
<td>EE Total</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ER Total</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

**EE Total**

The **EE Total** custom field displays the employee monthly rate multiplied by the total number of employees covered by each plan option. It uses the following expression:

\[
\text{COUNT(Employee.NameNumber)\times BenPlanOptionRateValue.EmployeeCost}
\]

**ER Total**

The **ER Total** custom field displays the employee monthly rate multiplied by the total volume then divided by 1,000. It uses the following expression:

\[
\text{COUNT(Employee.NameNumber)\times BenPlanOptionRateValue.EmployerCost}
\]

Filters

This template includes the following filters:
Carrier List Bill - Health Plans

The Carrier List Bill - Health Plans report uses the Carrier List Bill topic to generate a carrier list for health plans. The Total column in the report displays the employer monthly rate multiplied by the total number of employees covered by each plan option.

Fields

This template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carrier</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Plan Option</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Rate Qualifier</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EE Monthly Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ER Monthly Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Covered Lives</td>
<td></td>
<td>Count</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Total

The Total custom field displays the employer monthly rate multiplied by the total number of employees covered by each plan option. It uses the following expression:

\[
\text{COUNT(Employee.NameNumber)} \times \text{BenPlanOptionRateValue.EmployerCost}
\]

Filters

This template includes the following filters:
Carrier List Bill - Vol Life and ADD Plans

The Carrier List Bill - Vol Life and ADD Plans report uses the Carrier List Bill topic to generate a carrier list for voluntary life and AD&D plans. The EE Total Cost column in the report displays the employee rate multiplied by the volume and then multiplied by 1,000.

Fields

This template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carrier</td>
<td>Yes</td>
<td>Ascending</td>
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</tr>
<tr>
<td>Plan Option</td>
<td>Yes</td>
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<td></td>
</tr>
<tr>
<td>Rate Qualifier</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EE Monthly Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Covered Lives</td>
<td></td>
<td>Count</td>
<td></td>
</tr>
<tr>
<td>Volume</td>
<td></td>
<td>Sum</td>
<td></td>
</tr>
<tr>
<td>EE Total Cost</td>
<td></td>
<td>Sum</td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

EE Total Cost

The EE Total Cost custom field displays the employee rate multiplied by the volume and then multiplied by 1,000. It uses the following expression:

\[(\text{BenPlanEmployeeElectedOption.CoverageAmount} \times \text{BenPlanOptionRateValue.EmployeeCost}) / 1000\]

Filters

This template includes the following filters:
Dependent Age Out - Child

The Dependent Age Out - Child report uses the Employee Benefit Elections - As of Date topic to display employees’ dependent children who may age out of a benefit plan option. The report includes information about employees and their child dependents, including the child’s name, age, and coverage dates.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EE SSN/SIN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plan Option</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relationship</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep Last Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep First Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep SSN/SIN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep Birth Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep Age</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep Opt Eff From</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep Opt Eff To</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep Cov From</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep Cov To</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Custom Fields

Dep Age

The **Dep Age** custom field displays the dependent’s age. It uses the following expression:

\[
\text{DATEDIFF(year, EmployeeDependentBeneficiary.BirthDate, GETDATE())}
\]

Dep Cov From

The **Dep Cov From** custom field displays the effective start date of the dependent’s coverage. It uses the following expression:

\[
\text{BenPlanEmployeeDependentElectedOption.CoverageStart}
\]

Dep Cov To

The **Dep Cov To** custom field displays the effective end date of the dependent’s coverage. It uses the following expression:

\[
\text{BenPlanEmployeeDependentElectedOption.CoverageEnd}
\]

Filters

The template includes the following filters:

**Time Period**

**Equal**

**Dependent Age Out - Spouse**

The **Dependent Age Out - Spouse** report uses the **Employee Benefit Elections - As of Date** topic to display employees’ covered spouse dependents who might age out of a benefit plan option. The report includes information about employees and their spouses, including the spouse’s name, age, and coverage dates.
**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EE SSN/SIN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plan Option</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relationship</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep Last Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep First Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep SSN/SIN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep Birth Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep Age</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep Opt Eff From</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep Opt Eff To</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep Cov From</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep Cov To</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Dep Age**

The **Dep Age** custom field displays the dependent’s age. It uses the following expression:

\[
\text{DATEDIFF(year, EmployeeDependentBeneficiary.BirthDate, GETDATE())}
\]

**Dep Cov From**

The **Dep Cov From** custom field displays the effective start date of the dependent’s coverage. It uses the following expression:

\[
\text{BenPlanEmployeeDependentElectedOption.CoverageStart}
\]

**Dep Cov To**

The **Dep Cov To** custom field displays the effective end date of the dependent’s coverage. It uses the following expression:

\[
\text{BenPlanEmployeeDependentElectedOption.CoverageEnd}
\]

**Filters**

The template includes the following filters:
Elections with Override for Selected Plans

The Elections with Override for Selected Plans report is a variation of the Benefit Employees with Override report. It uses the Benefit Management Audit topic to display elections that have been flagged as "Override" for selected plans. These benefit options will not be affected by a recalculation unless the employee is no longer eligible for the plan option.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Number</td>
<td>A to Z</td>
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<td></td>
</tr>
<tr>
<td>Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Option</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Cost</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employer Cost</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Annual Employee Cost</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Employer Cost</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contribution Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contribution Pct</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coverage Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Filters

The template includes the following filters:

Start Date 1/23/2017
End Date

And Ben Plan Employee Elected... Equal False
And Effective Start Less Than Equal @EndDate
And Effective End Greater Than @StartDate
And Effective Start Not Equal Effective End
And Is Override Equal True
And Ben Plan Type Name In Please select a value
And Ben Plan Sub Type Name In Please select a value
And Plan In Please select a value
And Option In Please select a value
And Employee Display Name In Please select a value

Employee Benefit Elections

The Employee Benefit Elections report uses the Employee Benefit Elections topic to display benefit elections details for employees, dependents, and beneficiaries. Employee status, work assignment, and benefit plan information is also included.

Fields

This template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
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<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Employee SSN/SIN</td>
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<td></td>
</tr>
<tr>
<td>Original Hire Date</td>
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<td>Employee Birth Date</td>
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<tr>
<td>Field</td>
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</tr>
<tr>
<td>Employee Gender</td>
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<tr>
<td>Employment Status</td>
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<tr>
<td>Status Reason</td>
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<tr>
<td>Pay Class</td>
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<tr>
<td>Base Salary</td>
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</tr>
<tr>
<td>Base Rate</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Tobacco User</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Ben Plan Type</td>
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<td></td>
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</tr>
<tr>
<td>Ben Plan Option</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Employee Elected Option</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Effective Start</td>
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<td></td>
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<td>Employee Elected Option</td>
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</tr>
<tr>
<td>Effective End</td>
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<tr>
<td>Employee Elected Option</td>
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<td></td>
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</tr>
<tr>
<td>Coverage Start</td>
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<tr>
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<tr>
<td>Coverage Amount</td>
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</tr>
<tr>
<td>Relationship Type</td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>City</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State/Province</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postal Code</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

This template includes the following filters:
Employee Health Elections

The Employee Health Elections report uses the Employee Benefit Elections - As of Date topic to display employee health elections including plan option, effective dates, coverage dates, and both employee and employer per pay and annual costs.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Plan Sub Type</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Plan Option</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>SSN/SIN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tobacco User</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Opt Eff From</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Opt Eff To</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cov Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cov End</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>EE Per Pay Cost</td>
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<tr>
<td>EE Annual Cost</td>
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<tr>
<td>ER Per Pay Cost</td>
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</tr>
<tr>
<td>ER Annual Cost</td>
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</tr>
</tbody>
</table>
Filters

The template includes the following filters:

Employee Life and Disability Elections

The Employee Life and Disability Elections report uses the Employee Benefit Elections - As of Date topic to display employee life and disability elections, including effective dates, coverage dates, coverage amounts, and costs.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
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</thead>
<tbody>
<tr>
<td>Employee</td>
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<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Plan Sub Type</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Plan Option</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Opt Eff From</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>SSN/SIN</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Base Salary</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Tobacco User</td>
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<td></td>
</tr>
<tr>
<td>Opt Eff To</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Cov Start</td>
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<tr>
<td>EE Per Pay Cost</td>
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</tr>
</tbody>
</table>
Filters

The template includes the following filters:

Filters

Time Period

And Employment Status Group Name In Active X Inactive X Terminated X

And Ben Plan Type Name In Life & Disability X

And Plan Sub Type In

Employee Reimbursement Elections

The Employee Reimbursement Elections report uses the Employee Benefit Elections - As of Date topic to display employee reimbursement elections, including contribution amounts and contribution percentages.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Plan Sub Type</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Plan Option</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Opt Eff From</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>SSN/SIN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Opt Eff To</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cov Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cov End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EE Contrib Amt</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EE Contrib Pct</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ER Contrib Pct</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Filters

The template includes the following filters:

**Filters**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Plan Sub Type</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Plan Option</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Opt Eff From</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>SSN/SIN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Opt Eff To</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cov Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cov End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contrib Amt</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EE Contrib Pct</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ER Contrib Pct</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Employee Retirement Elections

The Employee Retirement Elections report uses the Employee Benefit Elections - As of Date topic to display employee retirement elections, including contribution amounts and percentages.

**Fields**

The template includes the following fields:
Employees with Benefit Coverage Ending

The Employees with Benefit Coverage Ending report uses the Employee Benefits Coverage End topic to display a list of employees and their dependents who lost coverage during the specified date range.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit Coverage End Event Date</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Employee Display Name</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Ben Coverage End Event Last Modified Date-Time</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Ben Plan Name</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Ben Plan Option Name</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Dependent Age (yrs)</td>
<td></td>
<td>Smallest to Largest</td>
<td></td>
</tr>
<tr>
<td>Employee Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Termination Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Birth Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ben Plan Employee Elected Option Effective Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ben Plan Employee Elected Option Effective End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Elected Option Last Modified Date Time</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Employee Elected Option Coverage Start

Employee Elected Option Coverage End

Dependent Name

Dependent Birth Date

Ben Plan Employee Dependent Elected Option Effective Start

Ben Plan Employee Dependent Election Option Effective End

Dependent Elected Option Last Modified Date Time

Dependent Elected Option Coverage Start

Dependent Elected Option Coverage End

**Custom Fields**

**Dependent Name**

The *Dependent Name* field displays the dependent's name. It uses the following expression:

```
EmployeeDependentBeneficiary.FirstName + EmployeeDependentBeneficiary.LastName
```

**Dependent Age (yrs)**

The *Dependent Age (yrs)* field displays the dependent's age. It uses the following expression:

```
DATEDIFF(year, EmployeeDependentBeneficiary.BirthDate, GETDATE())
```

**Filters**

The template includes the following filters:
Enrollments

The Benefits > Enrollments category contains reports about employee enrollments. Benefit administrators can use these reports to view information about benefits enrollments, including the statuses of open enrollments, life event enrollments, periodic enrollments, and PPACA enrollments. The data in these reports comes from the Benefits feature.

Benefit Enrollment Notifications

The Benefit Enrollment Notifications report uses the Benefit Enrollment Notifications topic to display details about which employees have received an enrollment notification for benefits.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Enrollment Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notification Sent</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Status</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
Benefit Enrollment Status

The Benefit Enrollment Status report template uses the Benefit Enrollment Status topic to display information about benefit enrollments, such as enrollment date, enrollment status, and enrollment offered and submitted dates.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Name</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee Number</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Open Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Close Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Event Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Offered Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Submitted Date</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
Benefit Enrollment Status - Life Event

The Benefit Enrollment Status - Life Event report uses the Benefit Enrollment Status topic to display a list of employees with life event enrollments, including status and communication start and end dates. Benefits administrators can use this report to monitor whether life event enrollments are completed on time.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Status</td>
<td>Yes</td>
<td>Descending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Enrollment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comm Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comm End</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
Benefit Enrollment Status - New Hire Enrollments

The Benefit Enrollment Status - New Hire Enrollments report is a variation of the Benefit Enrollment Status report, and it uses the Benefit Enrollment Status topic. This variation displays details on new hire enrollments, including enrollment status, open and close dates, and workflow status and approval date. Benefits administrators can use this report to monitor that new hires are completing their enrollments on time.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Status</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Open</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Close</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workflow Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date WF Approved</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Workflow Status
The **Workflow Status** field displays the workflow status. It uses the following expression:

```sql
CASE WHEN BenEmployeeEnrollmentStatus.ShortName = 'PENDING' THEN 'PENDING SUBMISSION'
WHEN (BenEmployeeEnrollmentStatus.ShortName = 'COMPLETED' AND
  BenEmployeeEnrollment.EnrollmentSubmittedDate is not null)
  THEN 'APPROVED'
ELSE 'NOT APPROVED' END
```

**Filters**

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Period</td>
<td>Within * Last 90 Days Including Today</td>
</tr>
<tr>
<td>And Enrollment Open</td>
<td>Less Than Equal @EffectiveEnd</td>
</tr>
<tr>
<td>And Enrollment Close</td>
<td>Greater Than @EffectiveStart</td>
</tr>
<tr>
<td>And Employee Employment Status</td>
<td>Less Than Equal 1/20/2017</td>
</tr>
<tr>
<td>And Employee Employment Status</td>
<td>Greater Than 1/20/2017</td>
</tr>
<tr>
<td>And Enrollment Status</td>
<td>In Pending Completed Submitted</td>
</tr>
<tr>
<td>And Ben Enrollment Type Name</td>
<td>In New Hire Event</td>
</tr>
<tr>
<td>And Employee Display Name</td>
<td>In</td>
</tr>
</tbody>
</table>

**Benefit Enrollment Status - Open Enrollments**

The Benefit Enrollment Status - Open Enrollments report is a variation of the Benefit Enrollment Status template, and it uses the Benefit Enrollment Status topic. It displays details of open enrollments, including enrollment status, name, and the open and close date. Benefits administrators can use this report to monitor the status of open enrollments.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Status</td>
<td>Yes</td>
<td>Descending</td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Enrollment Name</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Filters

The template includes the following filters:

Filters

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Status</td>
<td>Yes</td>
<td>Descending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Enrollment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comm Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comm End</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Period</td>
</tr>
<tr>
<td>And Comm Start</td>
</tr>
<tr>
<td>And Comm End</td>
</tr>
<tr>
<td>And Employee Employment Status</td>
</tr>
<tr>
<td>And Employee Employment Status</td>
</tr>
<tr>
<td>And Enrollment Status</td>
</tr>
<tr>
<td>And Employee Display Name</td>
</tr>
<tr>
<td>And Ben Enrollment Type Name</td>
</tr>
</tbody>
</table>

Benefit Enrollment Status - Pending

The Benefit Enrollment Status - Pending report uses the Benefit Enrollment Status topic to display employees who have pending enrollments, including communication start and end dates. Benefits administrators can use this report to view employees’ pending enrollments.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Status</td>
<td>Yes</td>
<td>Descending</td>
<td></td>
</tr>
<tr>
<td>Enrollment</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Comm End</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Comm Start</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
The Benefit Enrollment Status - Periodic report uses the Benefit Enrollment Status topic to display a list of employees who have periodic enrollments, including communication start and end dates. Benefits administrators can use this report to monitor whether periodic enrollments are completed on time.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Status</td>
<td>Yes</td>
<td>Descending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comm Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comm End</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:
The Benefit Enrollment Status - Work Event report uses the Benefit Enrollment Status topic to display employees who have work event enrollments, including communication start and end dates. Benefits administrators can use this report to monitor when employees’ work event enrollments are completed on time.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Status</td>
<td>Yes</td>
<td>Descending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Enrollment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comm Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comm End</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:

- **Time Period**: Within or Last 90 Days Including Today
- **Enrollment Status**: Yes, @EffectiveEnd
- **Comm Start**: Less Than Equal, @EffectiveStart
- **Employee Employment Status**: Less Than Equal, 2/8/2017
- **Employee Employment Status**: Greater Than, 2/8/2017
- **Enrollment Status**: In, Pending, Completed, Submitted
- **Employee Display Name**: In, Please select a value
- **Ben Enrollment Type Name**: In, Periodic Enrollment
Benefit Enrollment Status incl Address

The Benefit Enrollment Status incl Address report uses the Benefit Enrollment Status incl Address topic to display details about which employees have specific enrollments. It includes information such as the enrollments status and employee address.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Enrollment Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Open Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Close Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Event Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Offered Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Submitted Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emp Address 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emp Address 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emp City</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emp State</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emp Zip Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address Type</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th>Time Period</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Open Date</td>
<td>Within</td>
<td>Less Than Equal</td>
<td>@EffectiveEnd</td>
<td></td>
</tr>
<tr>
<td>Enrollment Close Date</td>
<td>Greater Than</td>
<td>@EffectiveStart</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Employment Status Effective Start Date</td>
<td>Less Than Equal</td>
<td>10/11/2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Employment Status Effective End Date</td>
<td>Greater Than</td>
<td>10/11/2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Status</td>
<td>In</td>
<td>Please select a value</td>
<td>0 Selected</td>
<td></td>
</tr>
<tr>
<td>Enrollment Type</td>
<td>In</td>
<td>Please select a value</td>
<td>0 Selected</td>
<td></td>
</tr>
</tbody>
</table>

Benefit Enrollment Status incl Address, Language, and Work Assignment

The Benefit Enrollment Status incl Address, Language and Work Assignment report uses the topic by the same name to display details about which employees have specific enrollments and what the enrollment status is. Benefit administrators can use the new template to monitor benefit statuses, and display this along with other relevant employee information.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Open Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Close Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Event Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Offered Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Submitted Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emp Address 1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Emp Address 2 |       |       |       
Emp City |       |       |       
Emp State |       |       |       
Emp Zip Code |       |       |       
Address Type |       |       |       
Emp Language |       |       |       
Position Name |       |       |       

Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Period</td>
</tr>
<tr>
<td>Within</td>
</tr>
</tbody>
</table>

And Enrollment Open Date Less Than Equal @EffectiveEnd
And Enrollment Close Date Greater Than @EffectiveStart
And Employee Employment Status Effective Start Less Than Equal 3/14/2018
And Employee Employment Status Effective End Greater Than 3/14/2018

Enrollment Setup

The Enrollment Setup report uses the Enrollment Setup topic to display a list of all enrollments set up within the application.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reference Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eff From</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eff To</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Published Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OE Comm Start</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Custom Fields**

**Country**

The **Country** custom field displays the country of enrollments that are from the US and Canada. It uses the following expression:

```
CASE
  WHEN DFFormTemplate.GeoCountryId = 1 THEN 'USA'
  WHEN DFFormTemplate.GeoCountryId = 2 THEN 'Canada'
  ELSE 'None'
END
```

**Published Status**

The **Published Status** custom field displays whether the enrollment has been published. It uses the following expression:

```
CASE
  WHEN BenEnrollmentEvent.Published = 1 THEN 'Published'
  WHEN BenEnrollmentPeriod.Published = 1 THEN 'Published'
  WHEN BenEnrollmentPeriodicEvent.Published = 1 THEN 'Published'
  WHEN BenEnrollmentACA.Published = 1 THEN 'Published'
  ELSE 'Not Published'
END
```

**Filters**

This report template doesn’t include any filters.

**HR Events**

The **Benefits > HR Events** category contains reports about HR events related to employee benefits and the associated workflows that are triggered when employees submit certain forms. The data in these reports comes from employee self-service forms and the HR Events found in the **Workflow Administration** feature.

**HR Events**

The HR Events report uses the HR Events topic to display information about HR Events that fall within a specified date range, including the event type, event date, employee name, and workflow template name.

**Fields**

The template includes the following fields:
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Event Type</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Event Date</td>
<td>Newest to Oldest</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workflow Template Name</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

This template includes the following filters:

**Filters**

- **Time Period**: Specify a time period for which to include data. You can choose one of the following operators:
  - **Within**: Using this operator, you can select a relative time period, such as This Calendar Year or Last N Complete Months.
  - **Between**: Using this operator, you can select a start and end date for the data to be included in the report.
  - **As of**: Using this operator, you can select a date to view data as of that date.
- **Include my current employees only**: Select True and the report includes records for all employees that you have access to now, regardless of the time period you specified for the report. Select False and the report includes all employees that you had access to during the specified time period.

**Note**: This option is only available if you have access to the Historical Employee Data feature. If you don’t see this option when you run the report, the report will only include records for the employees you currently have access to, regardless of the time period.

- **Event Date**: The event dates included are determined by the time period you selected above.
• **HR Event last Modified Timestamp**: Select start dates and times to filter for HR events that were modified at a certain time.

**HR Events - Age Changed**

The HR Events - Age Changed report uses the HR Events topic to display details for employees where an HR event was triggered by an employee's age changing, including the workflow that was triggered.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Event Date</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Triggered Workflow</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

This template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th>Time Period</th>
<th>Last 90 Days Including Today</th>
<th>Include my current employees only</th>
<th>@EffectiveStart</th>
<th>@EffectiveEnd</th>
<th>AgeChanged</th>
</tr>
</thead>
<tbody>
<tr>
<td>And HR Event Date Greater Than Equal</td>
<td></td>
<td></td>
<td>True</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>And HR Event Date Less Than Equal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>And HR Event Type Reference Code Equal</td>
<td></td>
<td></td>
<td></td>
<td>@EffectiveStart</td>
<td></td>
<td>AgeChanged</td>
</tr>
<tr>
<td>And HR Event Last Modified Timestamp Greater Than Equal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>And HR Event Last Modified Timestamp Less Than Equal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**HR Events - Assignment Changed**

The HR Events - Assignment Changed report uses the HR Events topic to display details for employees who had an HR event triggered by an assignment change, including the workflow that was triggered.
Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Event Date</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Triggered Workflow</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

This template includes the following filters:

Filters

Time Period

Include my current employees only

And HR Event Date Greater Than Equal @EffectiveStart
And HR Event Date Less Than Equal @EffectiveEnd
And HR Event Type Reference Code Equal AssignmentChanged
And HR Event Last Modified Timestamp Greater Than Equal
And HR Event Last Modified Timestamp Less Than Equal

HR Events - Dependent Added

The HR Events - Dependent Added report uses the HR Events topic to display details for employees where an HR event was triggered by a dependent being added, including the workflow that was triggered.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Event Date</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
</tbody>
</table>
Triggered Workflow

Filters
This template includes the following filters:

**Filters**

**HR Events - Dependent Age Changed**

The HR Events - Dependent Age Changed report uses the HR Event topic to display details for employees' dependents, where an HR event was triggered due to the dependent having a change in age. The report includes the workflow that was triggered.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event Date</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Workflow Template Name</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

This template includes the following filters:
**HR Events - Dependent Ended**

The HR Events - Dependent Ended report uses the HR Events topic to display details for employees' dependents who had an HR event triggered because the dependent's eligibility ended, including the workflow that was triggered.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Event Date</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Triggered Workflow</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

This template includes the following filters:
HR Events - Dependent Gained Coverage

The HR Events - Dependent Gained Coverage report uses the HR Events topic to display details for employees’ dependents who had an HR event triggered by gaining eligibility for coverage elsewhere, including the workflow that was triggered.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event Date</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Workflow Template Name</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

This template includes the following filters:
HR Events - Dependent Lost Coverage

The HR Events - Dependent Lost Coverage report uses the HR Events topic to display details for employees’ dependents who had an HR event triggered by a dependent losing eligibility for coverage elsewhere, including the workflow that was triggered.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event Date</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Workflow Template Name</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

This template includes the following filters:
The HR Events - Marital Status Changed report uses the HR Events topic to display details for employees where an HR event was triggered by a change in marital status, including the workflow that was triggered.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Event Date</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Triggered Workflow</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

This template includes the following filters:
HR Events - New Hire Completed

The HR Events - New Hire Completed report uses the HR Events topic to display details for employees where an HR Event was triggered due to a New Hire being processed, including workflow that was triggered.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Event Date</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Triggered Workflow</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

This template includes the following filters:
The HR Events for Selected Employees report is a variation of the existing HR Events report template, and it uses the HR Events topic. It displays information on HR events that have occurred for the selected employees, and associated workflow information.

### Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Processed</td>
<td></td>
<td>Newest to Oldest</td>
<td></td>
</tr>
<tr>
<td>HR Event</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR Event Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workflow</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Processed**

The **Processed** field displays the workflow end. It uses the following expression:

\[DFWorkflowData.LastModifiedTimestamp\]

**Filters**

The template includes the following filters:
The **Benefits > PPACA** category contains reports that display your organization's Affordable Care Act data. Benefits Administrators can use these reports to view information related to employees' PPACA eligibility, coverage, premiums, and forms. The data in these reports comes from the **PPACA** feature.

### Affordable Care Act - 1095-C by Delivery Option

The Affordable Care Act - 1095-C by Delivery Option report is a variation of the Affordable Care Act - Year End Coverage report, and it uses the Affordable Care Act - Year End topic. This variation displays employees whose completed 1095-C forms are ready to send, and their selected delivery method (electronic only or print and electronic).

### Fields

This template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery Option</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity Name</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>EIN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Filing Year</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Custom Fields

Delivery Option

The **Delivery Option** custom field displays the employee’s selected delivery option for the 1095-C form. It uses the following expression:

```
CASE
  WHEN (BenefitsACAYearEndEmployeeElectronicConsent.TaxFormCode = '1095C'
       AND BenefitsACAYearEndEmployeeElectronicConsent.IsConsented = 1)
  THEN 'Electronic Only'
  WHEN (BenefitsACAYearEndEmployeeElectronicConsent.TaxFormCode IS NULL
       AND BenefitsACAYearEndEmployeeElectronicConsent.IsConsented = 1)
  THEN 'No1095Consent'
  WHEN (BenefitsACAYearEndEmployeeElectronicConsent.TaxFormCode <> '1095C'
       AND BenefitsACAYearEndEmployeeElectronicConsent.IsConsented = 1)
  THEN 'No1095Consent'
  WHEN BenefitsACAYearEndEmployeeElectronicConsent.IsConsented = 0 THEN
    'Printed and Electronic'
END
```

Filing Year

The **Filing Year** custom field displays the filing year that the record is associated with. It uses the following expression:

```
CAST(BenefitsACAYearEndEmployee1095.Year as VARCHAR)
```

Filters

This template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th>*</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Filing Year Start Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Filing Year End Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Benefits PPACA Year End Employee 1095 Cust...</td>
<td>Equal</td>
<td>Send</td>
</tr>
<tr>
<td>And Delivery Option</td>
<td>Not Equal</td>
<td>No1095Consent</td>
</tr>
<tr>
<td>And Filing Year</td>
<td>Equal</td>
<td>*</td>
</tr>
</tbody>
</table>

Affordable Care Act - Eligibility Status

The **Affordable Care Act - Eligibility Status** report uses the Affordable Care Act - Eligibility Status topic to display average work hours based on eligibility status as configured in the **PPACA** feature of **Benefits**.

**Note:** For more information about PPACA, refer to the **Benefits Administration Guide**.
Fields

This template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee Display Name</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Ben PPACA Calendar Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ben PPACA Calendar Cycle Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employment Status Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Original Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ben PPACA Employee Eligibility Total Hours</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ben PPACA Employee Eligibility Average Hours</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

This template includes the following filters:

- Affordable Care Act - Employee Offered Coverage

.filters

- P P A C A Calendar and Stability Period
- Benefit P P A C A Eligibility Current Status
- Benefit P P A C A Eligibility Previous Status
- Benefit P P A C A Eligibility Next Status

And Employee Employment Status Effective Start Date Less Than Equal Stability Period End Date
And Employee Employment Status Effective End Greater Than Equal Measurement Period Start Date

Affordable Care Act - Employee Offered Coverage

The Affordable Care Act - Employee Offered Coverage report uses the Affordable Care Act - Employee Offered Coverage topic to display coverage details for the Affordable Care Act, such as benefit plan options, costs, plan effective start dates, and the month coverage was offered.

Fields

This template includes the following fields:
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Original Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employment Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dependent Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Benefit Option</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Event Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stability Period Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plan Effective Start Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Month Coverage Offered</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Employee Cost</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Employer Cost</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Dependent Name**

The **Dependent Name** custom field displays the name of the dependent. It uses the following expression:

BenDependentOffering.FirstName + ' ' + BenDependentOffering.LastName

**Month Coverage Offered**

The **Month Coverage Offered** custom field displays the month in which coverage was offered. It uses the following expression:

```sql
CASE
    WHEN DATEPART(dd, (BenEmployeeOffering.PlanEffectiveStart)) = 1 THEN DATENAME(MONTH, BenEmployeeOffering.PlanEffectiveStart)
    ELSE ''
END
```

**Filters**

This template includes the following filters:
Affordable Care Act - Lowest Cost Monthly Premium

The Affordable Care Act - Lowest Cost Monthly Premium report is a variation of the Affordable Care Act - Employee Offered Coverage template, and it uses the Affordable Care Act - Employee Offered Coverage topic. This variation lists employees that were offered benefit coverage, as well as the lowest cost monthly premium offered during a given date range. Benefits administrators can use this report template to review how the lowest cost monthly premium field will be filled in 1095-C forms.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Number</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offered Cov. Start</td>
<td>Oldest to Newest</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lowest Monthly Prem.</td>
<td>Column Total: Minimum</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Lowest Monthly Prem.

The **Lowest Monthly Prem.** custom field displays the lowest cost monthly premium. It uses the following expression:

```
Round(BenEmployeeOffering.AnnualEmployeeCost/12,3)
```

Filters

The template includes the following filters:
The Affordable Care Act - No Period Assigned report uses the Affordable Care Act - No Period Assigned topic to display information about employees who are not assigned to an Affordable Care Act period. You can use this report to view employees who are not assigned to an Affordable Care Act period as of a specific date.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Number</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Recent Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Override Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Class</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:
Affordable Care Act - Notification History

The Affordable Care Act - Notification History report uses the Benefit Message Center topic to display a list of employees who were sent PPACA administration notifications during a specified date range. The report results include the actual notification message.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Original Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Notification Sent</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subject</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Message</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Read Receipt</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:

Filters

And Subject Contains * Benefit

And Date Notification Sent Greater Than Equal

And Date Notification Sent Less Than Equal

Affordable Care Act - Offered Coverage for Selected Employees

The Affordable Care Act - Offered Coverage for Selected Employees report is a variation of the Affordable Care Act - Employee Offered Coverage template, and it uses the Affordable Care Act
- Employee Offered Coverage topic. It displays ACA-reportable coverage offer details for selected employees or options during a selected date range.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Number</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Benefit Option</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Month Offered Cov.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offered Cov. Start</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Month Offered Cov.**

The *Month Offered Cov.* custom field displays the month the coverage is offered. It uses the following expression:

```sql
CASE
    WHEN DATEPART(dd, (BenEmployeeOffering.PlanEffectiveStart)) = 1 THEN
        DATENAME(MONTH, BenEmployeeOffering.PlanEffectiveStart)
    ELSE
        DATENAME(MONTH, DATEADD(MM,1,BenEmployeeOffering.PlanEffectiveStart))
END
```

**Filters**

The template includes the following filters:
The Affordable Care Act - Self Insured - Partial Year Coverage report is a variation of the Affordable Care Act - Year End Self Insured Individuals report. It uses the Affordable Care Act - Year End topic to display monthly details for covered individuals where either the employee or dependent had partial year coverage for the selected filing year using data from the 1095-C forms.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coverage</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Dependent Birth Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Termination Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dependent Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relationship</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Covered Jan-Is Covered Dec</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Coverage**

The **Coverage** custom field displays the partial year coverage. It uses the following expression:
ELSE 'Not Covered'
END)
END

**Dependent Name**

The **Dependent Name** custom field displays the dependent's name. It uses the following expression:

```sql
CASE WHEN (EmployeeDependentBeneficiary.FirstName + ' ' + EmployeeDependentBeneficiary.LastName) IS NULL THEN '(Employee)' ELSE EmployeeDependentBeneficiary.FirstName + ' ' + EmployeeDependentBeneficiary.LastName END
```
**Relationship**

The **Relationship** custom field displays the relationship to the individual. It uses the following expression:

```sql
CASE WHEN RelationshipType.ShortName IS NULL THEN 'Self'
ELSE RelationshipType.ShortName
END
```

**Is Covered Jan to Is Covered Dec**

The **Is Covered Jan** field indicates whether or not the individual is covered during January. It uses the following expression:

```sql
CASE WHEN BenefitsACAYearEndEmployee1095CoveredIndividual.IsCovered1 = 0 THEN 'No'
ELSE 'Yes'
END
```

**Note:** The **Is Covered Feb** through to **Is Covered Dec** fields have similar expressions.

**Filters**

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th>Filing Year Start Date</th>
<th>Filing Year End Date</th>
<th>Coverage</th>
<th>Equal</th>
<th>Partial Year Coverage</th>
<th>And</th>
<th>Ben PPACA Year End Employee 1095 Cust...</th>
<th>Equal</th>
<th>And</th>
<th>Employee Display Name</th>
<th>In</th>
<th>Please select a value</th>
</tr>
</thead>
</table>

**Affordable Care Act - Year End Coverage**

The **Affordable Care Act - Year End Coverage** report uses the Affordable Care Act - Year End topic to display employee ACA year end information, including monthly offered coverage, LCMP, and Safe Harbor details for the selected filing year from the 1095-C forms.

**Fields**

The template includes the following fields:
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>EIN</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Number</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Year</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Original Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rehire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Termination Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Completion Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1095 - C Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Self Insured</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Manual Override</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jan Coverage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jan LCMP</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jan Safe Harbor</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** There are **Coverage**, **LCMP**, and **Safe Harbor** fields for each month of the year.

**Custom Fields**

**Year**

The **Year** custom field displays the year. It uses the following expression:

```sql
REPLACE(CAST(BenACAYearEndFiling.Year AS NVARCHAR(4)),',','')
```

**Is Self Insured**

The **Is Self Insured** field indicates if the individual is self-insured. It uses the following expression:

```sql
CASE
    WHEN BenefitsACAYearEndEmployee1095.IsSelfInsured = 0 THEN 'No'
    ELSE 'Yes'
END
```

**Is Manual Override**

The **Is Manual Override** field displays manual override. It uses the following expression:

```sql
CASE
    WHEN BenefitsACAYearEndEmployee1095.IsLegalEntityAssignmentOverride = 0 THEN 'No'
    ELSE 'Yes'
END
```
Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Field</th>
<th>Group by</th>
<th>Sort Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filing Year Start Date</td>
<td></td>
<td>A to Z</td>
</tr>
<tr>
<td>Filing Year End Date</td>
<td></td>
<td>Ascending</td>
</tr>
</tbody>
</table>

Affordable Care Act - Year End Self Insured Individuals

The Affordable Care Act - Year End Self Insured Individuals report uses the Affordable Care Act - Year End topic to display Affordable Care Act year-end details for employees and covered individuals from the 1095-C Forms.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td></td>
<td>A to Z</td>
</tr>
<tr>
<td>Employee Name</td>
<td></td>
<td>Ascending</td>
</tr>
<tr>
<td>Year</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Social Security Number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Birth Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dependent Name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relationship Type</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dependent Social Security Number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dependent Birth Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Covered Jan-Is covered Dec</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Year

The Year custom field displays the ACA year. It uses the following expression:

REPLACE(CAST(BenACAYearEndFiling.Year AS NVARCHAR(4)),',','')

Dependent Name

The Dependent Name custom field displays the dependent's name. It uses the following expression:
EmployeeDependentBeneficiary.FirstName + ' ' + EmployeeDependentBeneficiary.LastName

**Is Covered Jan**

The **Is Covered Jan** field indicates whether or not the individual is covered during the selected month. It uses the following expression:

```
CASE
    WHEN BenefitsACAYearEndEmployee1095CoveredIndividual.IsCovered1 = 0 THEN 'No'
    ELSE 'Yes'
END
```

*Note:* There are more custom fields like the **Is Covered Jan** field for each month of the year.

**Filters**

The template includes the following filters:

* Filing Year Start Date
* Filing Year End Date

**Compensation Management Reports**

The **Compensation Management** category contains reports that display employee compensation information. It uses data from the **Compensation** feature.

**Compensation Cycle Details**

The Compensation Cycle Details report uses the Compensation Management topic to display all of the published compensation cycles. It lists all of the employees getting different reward types under each cycle.

**Fields**

The template contains the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compensation Cycle</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee Name Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Component</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-----------------------</td>
<td>--------------------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Salary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Hourly Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Compa-Ratio (%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bonus Eligible Salary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Target Bonus</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Target Bonus (%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Guidelines</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allocated (%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allocated ($)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proration Factor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lump Sum ($)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Salary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Hourly Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Compa-Ratio (%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Target Cash</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Actual Cash</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bonus Factor Guidelines</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Guidelines**

The **Guidelines** field displays the compensation guideline amount for that employee. It uses the following expression:

\[
\text{CONCAT}\left(\text{CAST}\left(\text{CPCompensationCycleManagerWorksheetEmployeePayComponent.RecommendedPercentEnd AS decimal(18, 2)}\right), '\-', \text{CAST}\left(\text{CPCompensationCycleManagerWorksheetEmployeePayComponent.RecommendedPercentStart AS decimal(18, 2)}\right)\right)
\]

**Bonus Factor Guidelines**

The **Bonus Factor Guidelines** field displays the bonus factor guideline amount for that employee. It uses the following expression:

\[
\text{CONCAT}\left(\text{CAST}\left(\text{CPCompensationCycleManagerWorksheetEmployeeBonusFactor.RecommendedPercentEnd AS decimal(18, 2)}\right), '\-', \text{CAST}\left(\text{CPCompensationCycleManagerWorksheetEmployeeBonusFactor.RecommendedPercentStart AS decimal(18, 2)}\right)\right)
\]

**Filters**

The template includes the following filters:
The Documents category contains reports about the documents that users can upload to the application, related to features such as benefits, human resources, and recruiting. The data for the reports in this category is from the Documents feature.

**Document Management**

The Document Management report uses the Document Management topic to display the history of documents, including the date that changes were made, and whether the document has been deleted.

**Fields**

This template includes the following columns:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document File</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Attached Employee</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Transaction Time</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Document History</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Deleted</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Document History**

The Document History custom field displays the document history. It uses the following expression:

```
CASE
WHEN DocMgmtFileStoreAudit.operation = 1 THEN 'Permanently Deleted'
WHEN DocMgmtFileStoreAudit.operation = 2 OR ROW_NUMBER() OVER (PARTITION BY DocMgmtFileStoreAudit.DocMgmtFilestoreId ORDER BY DocMgmtFileStoreAudit.transaction_time) = 1 THEN 'Inserted'
```
WHEN (DocMgmtFileStoreAudit.operation = 4 AND DocMgmtFileStoreAudit.IsDeleted = 0) AND ROW_NUMBER() OVER (PARTITION BY DocMgmtFileStoreAudit.DocMgmtFileStoreId ORDER BY DocMgmtFileStoreAudit.transaction_time) > 1 THEN 'Updated'
WHEN DocMgmtFileStoreAudit.operation = 4 AND DocMgmtFileStoreAudit.IsDeleted = 1 THEN 'Deleted'
END

**Filters**

This template includes the following filters:

- **Is Deleted**
- **Workflow Template Name**
- **Document File Store Last Modified**
- **Document Entity Display Name**
- **Document Type Name**
- **Document Tag Name of Tag**
- **Document File Details Is PII**
- **Attached Employee**
- **Document File Status Name**

**Human Resources Reports**

The **Human Resources** category contains reports with employee details such as contact information, employment details, and employee engagement. The data in these reports comes from the **My HR** feature and employee self-service forms input.
Compliance

The Human Resources > Compliance category contains reports that HR administrators can use to analyze their organization's compliance with the relevant regulations such as the FLSA threshold.

FLSA Threshold Analysis Effective 2016

The FLSA Threshold Analysis Effective 2016 report uses the HR Profile - As of Date topic to display compensation data with a comparison to the 12/01/2016 FLSA (Fair Labor Standards Act) salary threshold ($47,476). You can use this report to check your organization's compliance with the FLSA overtime rules by comparing your employees' hours and pay with the FLSA requirements.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Policy</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Base Salary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salary Difference</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Threshold</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Base Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Type Auto Pay</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Class</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Salary Difference

The Salary Difference custom field displays the difference between an employee's base salary and the new FLSA threshold ($47,476). It uses the following expression:

\[ 47476 - \text{EmployeeEmploymentStatus.BaseSalary} \]

Threshold

The Threshold custom field displays the FLSA threshold of an employee. It uses the following expression:
CASE
WHEN EmployeeEmploymentStatus.BaseSalary < 47476 THEN 'Below Threshold'
WHEN EmployeeEmploymentStatus.BaseSalary >= 47476 THEN 'Above Threshold'
ELSE ''
END

Filters

The template includes the following filters:

Filters

As of Date

And Primary Work Assignment Equal True

And Employment Status Group Name In

And Pay Policy In

And Pay Group In

And Threshold Equal

FLSA Threshold Analysis by Pay Policy Effective 2016

The FLSA Threshold Analysis by Pay Policy Effective 2016 report uses the HR Profile - As of Date topic to display employees’ regular weekly hours, FLSA status, pay rate, and salary compared to FLSA’s new minimum salary threshold for 2016. The information that this report displays is the same as the FLSA Threshold Analysis Effective 2016 report, with the records grouped by pay policy.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Policy</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Base Salary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salary Difference</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Threshold</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Base Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Custom Fields

Salary Difference

The **Salary Difference** custom field displays the difference between an employee's base salary and the new FLSA threshold ($47,476). It uses the following expression:

\[
47476 - \text{EmployeeEmploymentStatus.BaseSalary}
\]

Threshold

The **Threshold** custom field displays the FLSA threshold of an employee. It uses the following expression:

\[
\text{CASE}
\begin{align*}
& \text{WHEN EmployeeEmploymentStatus.BaseSalary} < 47476 \text{ THEN 'Below Threshold'} \\
& \text{WHEN EmployeeEmploymentStatus.BaseSalary} \geq 47476 \text{ THEN 'Above Threshold'} \\
& \text{ELSE ''}
\end{align*}
\text{END}
\]

Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>As of Date</td>
<td></td>
</tr>
<tr>
<td>And Primary Work Assignment</td>
<td>Equal</td>
</tr>
<tr>
<td>And Employment Status Group Name</td>
<td>In</td>
</tr>
<tr>
<td>And Pay Policy</td>
<td>In</td>
</tr>
<tr>
<td>And Pay Group</td>
<td>In</td>
</tr>
<tr>
<td>And Threshold</td>
<td>Equal</td>
</tr>
</tbody>
</table>
RTW All Documents by Manager

The RTW All Documents by Manager report uses the Confidential Identifications topic to display employees who have right to work documents, including document details. The records are grouped by manager.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RTW List</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RTW Document</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Doc Review</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reviewed By</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reviewed On</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective From</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective To</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Doc Review

The Doc Review custom field displays whether the document has been accepted or rejected by the reviewer. It uses the following expression:

```
CASE
  WHEN EmployeeConfidentialIdentification.RTWDocReview = 'A' THEN 'Accepted'
  WHEN EmployeeConfidentialIdentification.RTWDocReview = 'R' THEN 'Rejected'
  ELSE ''
END
```

Filters

This template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th>And</th>
<th>Identification Use For RTW</th>
<th>Equal</th>
<th>True</th>
</tr>
</thead>
<tbody>
<tr>
<td>And</td>
<td></td>
<td>Employment Status Group Name</td>
<td>Not In</td>
<td>Terminated</td>
</tr>
</tbody>
</table>
RTW Documents Pending Verification by Manager

The RTW Documents Pending Verification by Manager report uses the Confidential Identifications topic to display employees who have right to work documents that have not been marked as accepted. The records are grouped by manager.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RTW List</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RTW Document</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Doc Review</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reviewed By</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reviewed On</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective From</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective To</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Doc Review

The Doc Review custom field displays whether the document has been accepted or rejected by the reviewer. It uses the following expression:

```sql
CASE
  WHEN EmployeeConfidentialIdentification.RTWDocReview = 'A' THEN 'Accepted'
  WHEN EmployeeConfidentialIdentification.RTWDocReview = 'R' THEN 'Rejected'
  ELSE ''
END
```

Filters

This template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th>Equal</th>
<th>True</th>
</tr>
</thead>
<tbody>
<tr>
<td>And Identification Use For RTW</td>
<td>Equal</td>
<td>True</td>
</tr>
<tr>
<td>And Employment Status Group Name</td>
<td>Not In</td>
<td>Terminated</td>
</tr>
<tr>
<td>And Doc Review</td>
<td>Not Equal</td>
<td>Accepted</td>
</tr>
</tbody>
</table>
RTW Expiring Documents by Manager

The RTW Expiring Documents by Manager report uses the Confidential Identifications topic to display employees who have right to work documents that have expired or will expire in the next 90 days. The records are grouped by manager.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RTW List</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RTW Document</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Doc Review</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reviewed By</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reviewed On</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective From</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective To</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Doc Review

The Doc Review custom field displays whether the document has been accepted or rejected by the reviewer. It uses the following expression:

```
CASE
  WHEN EmployeeConfidentialIdentification.RTWDocReview = 'A' THEN 'Accepted'
  WHEN EmployeeConfidentialIdentification.RTWDocReview = 'R' THEN 'Rejected'
  ELSE '
END
```

Filters

This template includes the following filters:
Total Earnings by Employee

The Total Earnings by Employee report uses the HR Compliance topic to display data based on employee earnings, taxes, and employer deductions. You can use this report to identify and analyze the cause of any pay disparities in your organization.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Record Order</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Pay Grade</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Policy</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Base Salary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Record Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Amount

The Amount field displays the year-to-date amount. It uses the following expression:

```sql
CASE WHEN PRPayRunRegister.RecordType = 'Earning' THEN PRPayRunRegister.PayRunAmountYTD WHEN PRPayRunRegister.RecordType = 'Tax' AND PRPayRunRegister.ImpactsNetPay = 'False' THEN PRPayRunRegister.PayRunAmountYTD
```
The template includes the following filters:

**Filters**

The template includes the following fields:

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Length of Service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Age</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ethnicity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Grade</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EEO Job Title</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Manager

Status

Pay Class

Pay Type

Pay Policy

Base Salary

Earning Type

Amount

**Custom Fields**

**Age**

The *Age* field displays the employee’s age. It uses the following expression:

\[
\text{DATEDIFF(year, PRPayRunRegister.EmployeeBirthDate, GETDATE())}
\]

**Amount**

The *Amount* field displays the amount for that employee. It uses the following expression:

\[
\text{SUM(CASE WHEN PRPayRunRegister.RecordType = 'EarningGrouping' AND}
\text{PRPayRunRegister.IsLastCheck = 'True' THEN PRPayRunRegister.Amount ELSE}
\text{0.00 END)}
\]

**Ethnicity**

The *Ethnicity* field displays the employee’s ethnicity. It uses the following expression:

\[
\text{ISNULL(EnteredEthnicityCustom.EmployeeEnteredEthnicity,}
\text{EnteredEthnicityCustom.ManagerEnteredEthnicity)}
\]

**Gender**

The *Gender* field displays the employee’s gender. It uses the following expression:

\[
\text{CASE WHEN PRPayRunRegister.EmployeeGender = 'F' THEN 'Female' WHEN}
\text{PRPayRunRegister.EmployeeGender = 'M' THEN 'Male' ELSE 'Gender Unassigned' END}
\]

**Length of Service**

The *Length of Service* field displays the employee’s length of service. It uses the following expression:

\[
\text{CASE WHEN PRPayRunRegister.EmployeeHireDate < GETDATE() THEN CASE WHEN}
\text{PRPayRunRegister.EmployeeHireDate <}
\text{PRPayRunRegister.EmployeeTerminationDate THEN CONVERT(NVARCHAR(10),}
\text{FLOOR((DATEDIFF(DAY, PRPayRunRegister.EmployeeHireDate,}
\text{PRPayRunRegister.EmployeeTerminationDate) / 365.0))) + ' Years ' +}
\text{CONVERT(NVARCHAR(10), CASE WHEN CASE WHEN DATEPART(dd,
PRPayRunRegister.EmployeeHireDate) <= DATEPART(dd, PRPayRunRegister.EmployeeTerminationDate) THEN DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, PRPayRunRegister.EmployeeHireDate, PRPayRunRegister.EmployeeTerminationDate) / 365.0), PRPayRunRegister.EmployeeHireDate), PRPayRunRegister.EmployeeTerminationDate) ELSE DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, PRPayRunRegister.EmployeeHireDate, PRPayRunRegister.EmployeeTerminationDate) / 365.0), PRPayRunRegister.EmployeeHireDate), PRPayRunRegister.EmployeeTerminationDate) - 1 END = -1 THEN 0 ELSE CASE WHEN DATEPART(dd, PRPayRunRegister.EmployeeHireDate) <= DATEPART(dd, PRPayRunRegister.EmployeeTerminationDate) THEN DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, PRPayRunRegister.EmployeeHireDate, PRPayRunRegister.EmployeeTerminationDate) / 365.0), PRPayRunRegister.EmployeeHireDate), PRPayRunRegister.EmployeeTerminationDate) ELSE DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, PRPayRunRegister.EmployeeHireDate, PRPayRunRegister.EmployeeTerminationDate) / 365.0), PRPayRunRegister.EmployeeHireDate), PRPayRunRegister.EmployeeTerminationDate) - 1 END END) ELSE CONVERT(NVARCHAR(10), FLOOR(DATEDIFF(DAY, PRPayRunRegister.EmployeeHireDate, GETDATE()) / 365.0)) + ' Years ' + CONVERT(NVARCHAR(10), CASE WHEN CASE WHEN DATEPART(dd, PRPayRunRegister.EmployeeHireDate) <= DATEPART(dd, GETDATE()) THEN DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, PRPayRunRegister.EmployeeHireDate, GETDATE()) / 365.0), PRPayRunRegister.EmployeeHireDate), GETDATE()) ELSE DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, PRPayRunRegister.EmployeeHireDate, GETDATE()) / 365.0), PRPayRunRegister.EmployeeHireDate), GETDATE()) - 1 END = -1 THEN 0 ELSE CASE WHEN DATEPART(dd, PRPayRunRegister.EmployeeHireDate) <= DATEPART(dd, GETDATE()) THEN DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, PRPayRunRegister.EmployeeHireDate, GETDATE()) / 365.0), PRPayRunRegister.EmployeeHireDate), GETDATE()) ELSE DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, PRPayRunRegister.EmployeeHireDate, GETDATE()) / 365.0), PRPayRunRegister.EmployeeHireDate), GETDATE()) - 1 END END) END + ' Months' ELSE '' END

Filters

The template includes the following filters:
Contact Info

The Human Resources > Contact Info category contains reports about employee contact information. HR administrators and managers can use the reports in this category to generate employee contact lists.

Current Employee Contact

The Current Employee Contact report uses the HR Profile - Current Contact Information topic to display a list of employees with current contact information details such as address, phone number, and email address.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mobile Phone</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home Phone</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Email</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Email</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

This report contains the following custom field:

Address
The **Address** custom field displays all of the details of the employee's address as one field. It uses the following expression:

```sql
CASE WHEN [DenormEmployeeContact].[PrimaryAddress1] IS NOT NULL THEN 
  (([DenormEmployeeContact].[PrimaryAddress1] + (CASE WHEN 
    NULLIF([DenormEmployeeContact].[PrimaryAddress2], '') IS NULL THEN '' ELSE ', ' END) + ISNULL([DenormEmployeeContact].[PrimaryAddress2], '') + (CASE WHEN 
    NULLIF([DenormEmployeeContact].[PrimaryAddress3], '') IS NULL THEN '' ELSE ', ' END) + ISNULL([DenormEmployeeContact].[PrimaryAddress3], '') + (CASE WHEN 
    NULLIF([DenormEmployeeContact].[PrimaryAddressCity], '') IS NULL THEN '' ELSE ', ' END) + ISNULL([DenormEmployeeContact].[PrimaryAddressCity], '') + (CASE WHEN 
    NULLIF([DenormEmployeeContact].[PrimaryAddressStateShortName], '') IS NULL THEN '' ELSE ', ' END) + 
    ISNULL([DenormEmployeeContact].[PrimaryAddressStateShortName], '') + (CASE WHEN 
    NULLIF([DenormEmployeeContact].[PrimaryAddressPostalCode], '') IS NULL THEN '' ELSE ', ' END) + 
    ISNULL([DenormEmployeeContact].[PrimaryAddressPostalCode], '') + (CASE WHEN 
    NULLIF([DenormEmployeeContact].[PrimaryAddressCountryShortName], '') IS NULL THEN '' ELSE ', ' END) + 
    ISNULL([DenormEmployeeContact].[PrimaryAddressCountryShortName], '') + (CASE WHEN 
    NULLIF([DenormEmployeeContact].[PrimaryAddressCountryShortName], '') IS NULL THEN '' ELSE ', ' END) + 
    ISNULL([DenormEmployeeContact].[PrimaryAddressCountryShortName], '))) END
```

**Filters**

The template includes the following filters:

![Filters](image)

**Current Employee Emergency Contact**

The Current Employee Emergency Contact report uses the HR Profile - Current Contact Information topic to display a list of employees with current emergency contact information details such as contact name, relationship, address, phone number.

**Fields**

The template includes the following fields:
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Emergency Contact 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact 1 Relationship</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact 1 Address</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact 1 Phone</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emergency Contact 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact 2 Relationship</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact 2 Address</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact 2 Phone</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

This report contains the following custom fields:

**Contact 1 Address**

The Contact 1 Address custom field displays the first emergency contact's address. It uses the following expression:

```
CASE WHEN [DenormEmergencyContact].[EmergencyContact1PrimaryAddress1] IS NOT NULL THEN (([DenormEmergencyContact].[EmergencyContact1PrimaryAddress1] + CASE WHEN NULLIF([DenormEmergencyContact].[EmergencyContact1PrimaryAddress2], '') IS NULL THEN '' ELSE ', ' END) + ISNULL([DenormEmergencyContact].[EmergencyContact1PrimaryAddress2], '') + CASE WHEN NULLIF([DenormEmergencyContact].[EmergencyContact1PrimaryAddressCity], '') IS NULL THEN '' ELSE ', ' END) + ISNULL([DenormEmergencyContact].[EmergencyContact1PrimaryAddressCity], '') + CASE WHEN NULLIF([DenormEmergencyContact].[EmergencyContact1PrimaryAddressStateShortName], '') IS NULL THEN '' ELSE ', ' END) + ISNULL([DenormEmergencyContact].[EmergencyContact1PrimaryAddressStateShortName], '') + CASE WHEN NULLIF([DenormEmergencyContact].[EmergencyContact1PrimaryAddressPostalCode], '') IS NULL THEN '' ELSE ', ' END) + ISNULL([DenormEmergencyContact].[EmergencyContact1PrimaryAddressPostalCode], '') + CASE WHEN NULLIF([DenormEmergencyContact].[EmergencyContact1PrimaryAddressCountryShortName], '') IS NULL THEN '' ELSE ', ' END) + ISNULL([DenormEmergencyContact].[EmergencyContact1PrimaryAddressCountryShortName], ''))) END
```

**Contact 2 Address**
The **Contact 2 Address** custom field displays the second emergency contact's address. The expression it uses is similar expression the one above for the **Contact 1 Address** field, but it includes the address fields for the second contact instead of the first.

**Contact 1 Phone**

The **Contact 1 Phone** custom field displays the mobile phone and home phone information for the first emergency contact. It uses the following expression:

```sql
CASE WHEN DenormEmergencyContact.EmergencyContact1MobilePhone IS NOT NULL THEN 'Mobile: ' + DenormEmergencyContact.EmergencyContact1MobilePhone + CASE WHEN DenormEmergencyContact.EmergencyContact1HomePhone IS NOT NULL THEN ', Home: ' + DenormEmergencyContact.EmergencyContact1HomePhone ELSE '' END WHEN DenormEmergencyContact.EmergencyContact1HomePhone IS NOT NULL THEN 'Home: ' + DenormEmergencyContact.EmergencyContact1HomePhone ELSE NULL END
```

**Contact 2 Phone**

The **Contact 2 Phone** custom field displays the second emergency contact's phone information. The expression it uses is similar expression the one above for the **Contact 1 Phone** field, but it includes the phone number fields for the second contact instead of the first.

**Filters**

The template includes the following filters:

![Filters](image)

**Employee Contact**

The Employee Contact report uses the Employee Contact Details topic to display a list of active employees with their contact information. It includes details such as their name, address, phone number, and email address.

**Fields**

The template includes the following fields:
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Contact Info Group</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Contact Info Type</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Phone No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone Ext</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State/Province</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postal Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Phone Number**

The *Phone Number* custom field displays the employee's phone number. It uses the following expression:

```
CASE WHEN ContactInformationTypeGroup.XRefCode = 'Phone' THEN
      PersonContact.ContactNumber ELSE '' END
```

**Phone Ext**

The *Phone Ext* custom field displays the employee's phone number extension, where applicable. It uses the following expression:

```
CASE WHEN ContactInformationTypeGroup.XRefCode = 'Phone' THEN
      PersonContact.Extension ELSE '' END
```

**Email Address**

The *Email Address* custom field displays the employee's email address. It uses the following expression:

```
CASE WHEN ContactInformationTypeGroup.XRefCode = 'ElectronicAddress' THEN
      PersonContact.ElectronicAddress ELSE '' END
```

**Filters**

This template includes the following filters:
The Human Resources > Details category contains reports with personal and work-related employee details, such as equal employment data, status, hire date, job, and pay information. HR administrators and managers can use the reports in this category to generate detailed lists of employees.

**Current Employee Flight Risk by Manager**

The Current Employee Flight Risk by Manager report uses the Current Flight Risk and Performance Review topic to display a list of employees with current flight risk predictions and performance review details, with records grouped by manager. By default, the report records are filtered to exclude terminated employees.

*Note: If you do not use Dayforce performance reviews, remove the performance-related columns from the report (Performance Level, Last Review Rating, and Review Date).*

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flight Risk Indicator</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Performance Level

Last Review Rating

Review Date

Custom Fields

**Last Review Rating**

The **Last Review Rating** custom field displays the employee's latest performance review rating. It uses the following expression:

```sql
CASE
    WHEN vEmployeeReviewCycleReport.LastReviewRating IS NULL THEN 'Not Rated'
    ELSE CONVERT(nvarchar(10), CONVERT(Decimal(10,2), vEmployeeReviewCycleReport.LastReviewRating))+' / '+CONVERT(nvarchar(10), CONVERT(Decimal(10,2), vEmployeeReviewCycleReport.LastReviewMaxRating))
END
```

**Filters**

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>And Manager Display Name</td>
<td>In</td>
</tr>
<tr>
<td>And Employee Display Name</td>
<td>In</td>
</tr>
<tr>
<td>And Department</td>
<td>In</td>
</tr>
<tr>
<td>And Employment Status Group Name</td>
<td>Not In</td>
</tr>
<tr>
<td>And Primary Work Assignment</td>
<td>Equal True</td>
</tr>
</tbody>
</table>

**Employee Details**

The **Employee Details** report uses the HR Profile - As of Date topic to display a list of employees with details such as manager, hire date, birth date, job, department, status, pay type, pay class, and employee group. When you run this report, you can enter an as of date to view details as of a specific date.

**Fields**

The template includes the following fields:
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Birth Month Day</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Class</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Group</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:

**Filters**

- **As of Date**
- **Employee Display Name In**: Please select a value
- **Primary Work Assignment Equal**: True
- **Status In**: Active, Pre-Start
- **Birth Month Day Equal**: Select an Option...
- **Hire Date Less Than Equal**: 
- **Hire Date Greater Than Equal**: 
- **Location In**: Select an Option...
- **Job In**: Please select a value
- **Department In**: Please select a value
- **Pay Type In**: Please select a value
- **Pay Class In**: Please select a value
**Employee Details History**

The Employee Details History report uses the Employee Details - History topic to display detailed personal details about employees such as status, gender, and pay class.

**Fields**

This template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Orig Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rehire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seniority Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term. Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eligible for Rehire</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ethnicity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Class</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

This template includes the following filters:

**Filters**

| Effective Start | * |  
| Effective End   |   |  
| Include my current employees only | * True |  

And Employment Status Group Name In
And Status Date Less Than Equal @EffectiveEnd
And Employee Employment Status Effective End Greater Than @EffectiveStart
And Work Assignment Effective End Greater Than @EffectiveStart
And Work Assignment Effective Start Less Than Equal @EffectiveEnd
**Employee Details by Location**

The Employee Details by Location report uses the HR Profile topic to display detailed employment information associated with an employee, with the records grouped by location. You can use this template to view a complete listing of employees at the various locations in your organization with their personal and status information.

**Note:** If multiple managers are allowed, the report might include more than one record for some employees.

**Fields**

The template includes the following columns:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rehire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seniority Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term. Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eligible for Rehire</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status Eff. Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Class</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:
Employee Details by Status

The Employee Details by Status report uses the HR Profile topic to display detailed employment information associated with an employee, with the records grouped by employment status types. You can use this template to view a complete listing of employees at the various locations in your organization, listed by employment status type.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Yes</td>
<td>Descending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rehire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seniority Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term. Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eligible for Rehire</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status Eff. Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Class</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:

- Time Period: Between 1/25/2017 and End Date
- Employment Status Group Name: In
- Primary Work Assignment: Equal
- Location: In

1 Selected
Employee with Direct Deposit

The Employee with Direct Deposit report uses the Employee with Direct Deposit topic to display employee direct deposit details for all active direct deposit records.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deposit Acct No.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bank No.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bank</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Method</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RNT Transit No.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deposit Acc No.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deposit Value</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is PCT</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Remainder</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:

- Time Period: *1/28/2017*
- Primary Work Assignment: Equal to True
- Location: In
Office of Federal Contract Compliance Programs - OFCCP

The Office of Federal Contract Compliance Programs - OFCCP report uses the HR Profile topic to display employee details with respect to affirmative action and equal employment opportunity.

**Note:** In some countries, EEO data must not be visible to recruiters and hiring managers. You should check the requirements in your country and organization when assigning access to this template.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Ethnicity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EEO-1 Category</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Family</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Salary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Original Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work Assign Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work Assign End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Birth Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Manager  
Pay Grade  
FLSA Status  
Pay Class  
Location

**Filters**

The template includes the following filters:

**Filters**

Time Period  
Start Date  
End Date  

And  
Primary Work Assignment  
Equal  
True

And  
Contact Information Type Reference Code  
Equal  
PrimaryResidence

And  
Person Address Country Code  
Equal  
USA

And  
Employment Status Group Name  
Not Equal  
Terminated

**Policy Acknowledgement - Not Assigned**

The Policy Acknowledgement - Not Assigned report uses the Policy Acknowledgement topic to display a list of employees who were not assigned to the selected Policy Acknowledgements. You can use this report to identify which employees haven’t been assigned a particular policy.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Policy</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>As of Date</td>
<td>8/11/2017</td>
</tr>
<tr>
<td>Employment Status Group Name</td>
<td>Active, Pre-Start</td>
</tr>
<tr>
<td>Employee Employment Status Effective Start</td>
<td></td>
</tr>
<tr>
<td>Employee Employment Status Effective End</td>
<td></td>
</tr>
<tr>
<td>Sign Off</td>
<td>Empty</td>
</tr>
<tr>
<td>HR Policy</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
</tr>
</tbody>
</table>

Policy Acknowledgement - Not Signed Off

The Policy Acknowledgement - Not Signed Off report uses the HR Profile - As of Date topic to display a list of employees who haven't signed off on the selected policy acknowledgements. You can use this report to identify which employees haven’t signed off on a certain policy that was assigned to them.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Policy</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
Policy Acknowledgement - Signed Off

The Policy Acknowledgement - Signed Off report uses the Policy Acknowledgement topic to display a list of employees who have signed off on their assigned HR policies. The list includes employees with active and onboarding statuses, with the records grouped by policy name and sorted by employee name.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Policy</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Signed Off Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
Employee Engagement

The Human Resources > Employee Engagement category contains reports that display information about employees from the TeamRelate feature. HR administrators and managers can use these reports to view data such as communication style, core convictions, and engagement scores.

Employee Communication Style and Core Conviction

The Employee Communication Style and Core Conviction report uses the Employee Engagement Details topic to display a list of employees’ communication styles and their core convictions based on their TeamRelate survey results.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communication Style</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Core Conviction</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
Employee Engagement Check-In

The Employee Engagement Check-In report uses the Employee Engagement Details topic to display a list of employee personal engagement levels based on their TeamRelate check-ins. You can use this report to view employees’ most recent engagement levels and when they checked in, along with their primary department and manager details.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stress</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emotion</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Energy</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Your Day at Work</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Check-In</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
Employee Engagement Profile

The Employee Engagement Profile report uses the Employee Engagement Details topic to display a list of employees and their TeamRelate profiles. It includes a profile for each employee that includes core convictions, communication styles, and engagement check-in results.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communication Style</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Core Conviction</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stress Level</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emotion Level</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Energy Level</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activity Level</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Your Day at Work Level</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Check-In</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
Employee Engagement Score

The Employee Engagement Score report uses the Employee Engagement Details topic to display a list of employees and their most recent personal engagement scores, based on their TeamRelate check-ins.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stress Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emotion Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Energy Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activity Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Your Day at Work Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Check-In</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
Employee Engagement Score by Department

The Employee Engagement Score by Department report uses the Employee Engagement Details topic to display a list of employees and their most recent personal engagement scores, based on their TeamRelate check-ins. The records in this report are grouped by the employee’s primary department.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stress Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emotion Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Energy Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activity Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Your Day at Work Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Check-In</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
The Employee Engagement Score by Manager report uses the Employee Engagement Details topic to display a list of employees and their most recent personal engagement scores, based on their TeamRelate check-ins. The records are grouped by manager. You can use this report to view engagement scores for each manager's direct reports, and when the employees last checked in.

**Note:** This report only includes employees who are assigned to a manager. Employees who don't have a manager assignment are excluded from this report.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Stress Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emotion Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Energy Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activity Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Your Day at Work Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Check-In</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:
Employee Engagement Score by New Hire

The Employee Engagement Score by New Hire report uses the Employee Engagement Details topic to display the most recent engagement scores for recently hired employees, and when they most recently checked in on TeamRelate. Recently rehired employees are also included on the report.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rehire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stress Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emotion Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Energy Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activity Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Your Day at Work Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Check-In</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
Employee Engagement Survey - Not Taken

The Employee Engagement Survey - Not Taken report uses the Employee Engagement Details topic to display a list of employees who have never checked in using the TeamRelate employee engagement check in.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>And Employee Display Name</td>
<td>In</td>
<td>Please select a value</td>
<td>0 Selected</td>
</tr>
<tr>
<td>And Department</td>
<td>In</td>
<td>Please select a value</td>
<td>0 Selected</td>
</tr>
<tr>
<td>And Manager Display Name</td>
<td>In</td>
<td>Please select a value</td>
<td>0 Selected</td>
</tr>
</tbody>
</table>
Employment

The Human Resources > Employment category contains reports that display details about current and terminated employees in the organization. HR administrators can use the reports in this category to view employee headcounts, employee listings, length of service details, new hires, and terminated employees.

Active Employee Headcount by Location and Gender

The Active Employee Headcount by Location and Gender report uses the HR Profile - As of Date topic to display gender headcounts of active employees grouped by job and then by location. The records are filtered to include only primary work assignments. You can use this template to report on the number of males and females in the jobs at each location of your organization.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Headcount</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Gender

The Gender custom field displays the gender of each employee. It uses the following expression:

```
CASE
  WHEN Employee.Gender = 'F' THEN 'Females'
  WHEN Employee.Gender = 'M' THEN 'Males'
  ELSE 'Undefined'
END
```

Headcount

The Headcount custom field displays the active employee headcount. It uses the following expression:

```
COUNT(DISTINCT EmployeeEmploymentStatus.EmployeeNumber)
```

Filters

This template includes the following filters:
The Active Employee Headcount by Location and Position report uses the HR Profile - As of Date topic to display headcounts for employees with active status, grouped by assigned locations and positions. The records are filtered to include primary work assignments only. You can use this template to report on the number of active employees in each position at each location in your organization.

**Fields**

This template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Headcount</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Headcount**

The **Headcount** custom field displays the count of active employees. It uses the following expression:

\[
\text{COUNT(DISTINCT EmployeeEmploymentStatus.EmployeeNumber)}
\]

**Filters**

The template includes the following filters:
Active Employee Headcount by Manager

The Active Employee Headcount by Manager report uses the HR Profile - As of Date topic to display headcounts for employees with active status, with the records grouped by manager. You can use this template to report on how many employees are assigned to each manager in your organization.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Headcount</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Headcount

The Headcount custom field displays the count of active employees. It uses the following expression:

```
COUNT(DISTINCT EmployeeEmploymentStatus.EmployeeNumber)
```
The Active Employee Headcount Summary by Country and State report uses the HR Profile - As of Date topic to display headcounts for employees with active employment status, with the records listed by the country and state of the employee’s address. Administrators can use this report to view a headcount summary for each state and country, including the number of positions and average base salary.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>State</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td>Column: Count</td>
</tr>
<tr>
<td>Base Salary</td>
<td></td>
<td></td>
<td>Column: Average</td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:
The Employee Listing History report uses the Employee Details - Personal topic to display a list of active employees, including their current work details such as hire date, department, and job.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Orig Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rehire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>First Day</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seniority Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term. Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Class</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:
Filters

Effective Start
Effective End
Include my current employees only

And Employment Status Group Name In
And Employee Employment Status Effective... Less Than Equal @EffectiveEnd
And Employee Employment Status Effective... Greater Than @EffectiveStart
And Work Assignment Effective End Greater Than @EffectiveStart
And Work Assignment Effective Start Less Than Equal @EffectiveEnd
And Manager Effective End Empty
And Job Effective End Empty
And Position Effective End Empty

Employee Listing by Department

The Employee Listing by Department report uses the HR Profile - As of Date topic to display a list of active employees grouped by department. It contains information about the employees such as hire date, seniority date, status, location, position title, manager, pay type, and pay class. You can use this template to view a list of active employees in each department, along with their work information.

Note: Multiple rows may be displayed for employees who are assigned more than one manager.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rehire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>First Day Worked</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seniority Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term. Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Field Name</td>
<td>Group by</td>
<td>Sort Order</td>
<td>Totals</td>
</tr>
<tr>
<td>----------------</td>
<td>----------</td>
<td>------------</td>
<td>--------</td>
</tr>
<tr>
<td>Gender</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rehire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>First Day Worked</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seniority Date</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Gender

The Gender custom field displays the employee's gender. It uses the following expression:

```sql
CASE WHEN Employee.Gender = 'F' THEN 'Female'
     WHEN Employee.Gender = 'M' THEN 'Male'
ELSE 'Gender Unassigned'
END
```

Filters

The template includes the following filters:

- **As of Date**
- **Primary Work Assignment**
- **Location**
- **Employment Status Name**: `Active`

Employee Listing by Manager

The Employee Listing by Manager report uses the HR Profile - As of Date topic to display a list of active employees with details about their current employment and work. The records are grouped by manager. You can use this template to generate a list of active employees that are assigned to each manager.

**Note:** Multiple rows may be displayed for employees who are assigned more than one manager.

Fields

The template includes the following fields:
### Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>As of Date</td>
<td>*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Primary Work Assignment</td>
<td>Equal</td>
<td>True</td>
</tr>
<tr>
<td>And</td>
<td>Employment Status Group Name</td>
<td>In</td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Location</td>
<td>In</td>
<td></td>
</tr>
</tbody>
</table>

### Employee-Manager Assignment

The Employee-Manager Assignment report uses the Employee Details - Personal topic to display employee-manager assignments, by employee. You can use this report to see which manager(s) a specific employee reports to.

### Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rehire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>First Day Worked</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seniority Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term. Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Class</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Custom Fields

Manager Derived Method

The Manager Derived Method field displays the manager derived method. It uses the following expression:

```
CASE
    WHEN EmployeeManager.DerivationMethod = 1 THEN 'Direct Report'
    WHEN EmployeeManager.DerivationMethod = 2 THEN 'Derived by Org'
    WHEN EmployeeManager.DerivationMethod = 3 THEN 'Derived by Position'
    ELSE ' ' END
```

Filters

The template includes the following filters:

- Effective Start
- Effective End
- Include my current employees only

Employment Status Headcount by Location

The Employment Status Headcount by Location report uses the HR Profile - As of Date topic to display headcounts for employees with all employment statuses, with the records sorted by location. The records are filtered to contain only primary work assignments. The report includes information such as location, department, status, status reason, and headcount. You can use
this template to view employment statuses of all employees in each location and department of your organization.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status Reason</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Headcount</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Headcount**

The **Headcount** custom field displays the employee headcount. It uses the following expression:

```
COUNT(DISTINCT EmployeeEmploymentStatus.EmployeeNumber)
```

**Filters**

The template includes the following filters:

- **As of Date**
- **Employment Status Group Name**
- **Primary Work Assignment**
- **Location**
- **Department**
- **Job Name**

**Inactive and Terminated Headcount by Location**

The Inactive and Terminated Headcount by Location report uses the HR Profile - As of Date topic to display headcounts for employees in each location with "Inactive" and "Terminated" employment statuses. It includes the **Location, Status, Status Reason,** and **Headcount**
columns, with the records filtered to include only primary work assignments. You can use this report to view the number of inactive and terminated employees in each location.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location Name</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status Reason</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Headcount</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Headcount**

The **Headcount** custom field displays employee headcounts. It uses the following expression:

```
COUNT(DISTINCT EmployeeEmploymentStatus.EmployeeNumber)
```

**Filters**

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th>Data Type</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>As of Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employment Status Group Name</td>
<td>In</td>
<td>Inactive, Terminated</td>
</tr>
<tr>
<td>Primary Work Assignment</td>
<td>Equal</td>
<td>True</td>
</tr>
<tr>
<td>Location</td>
<td>In</td>
<td></td>
</tr>
<tr>
<td>Department Name</td>
<td>In</td>
<td></td>
</tr>
</tbody>
</table>

**Leaves of Absence**

The Leaves of Absence report uses the HR Profile topic to display a list of employees whose employment status reason type is a "Leave Reason." You can use this template to view a listing of employees who are currently on leaves of absence, including information such as reason, effective start date, and estimated return date.

**Fields**

The template includes the following fields:
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eff. Start Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Days Inactive</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reason</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimated Return Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Days Inactive**

The **Days Inactive** custom field displays the number of days that an employee is inactive. It uses the following expression:

```
DATEDIFF(day, EmployeeEmploymentStatus.EffectiveStart, COALESCE (EmployeeEmploymentStatus.EffectiveEnd, GetDate()))
```

**Filters**

The template includes the following filters:

- **Time Period**
  - Between
  - Start Date
  - End Date
- And Primary Work Assignment Equal True
- And Is Leave Reason Equal True

**Leaves of Absence by Location**

The **Leaves of Absence by Location** report uses the HR Profile topic to display a list of employees whose employment status reason type is a "Leave Reason," with the records grouped by location. You can use this report to view a listing of employees at each location in your organization who are currently on leaves of absence. The report includes information such as reason, effective start date, and estimated return date.

**Fields**

The template includes the following fields:
### Custom Fields

#### Days Inactive

The **Days Inactive** custom field displays the number of days that an employee is inactive. It uses the following expression:

\[
\text{DATEDIFF(day , EmployeeEmploymentStatus.EffectiveStart, COALESCE (EmployeeEmploymentStatus.EffectiveEnd, GetDate()) )}
\]

#### Filters

The template includes the following filters:

- **Time Period**: Between 
  - *1/27/2017*
  - End Date
- **And**: Primary Work Assignment = Equal True
- **And**: Is Leave Reason = Equal True

### Length of Service Based on Hire Date by Location

The **Length of Service Based on Hire Date by Location** report uses the HR Profile topic to display a list of active employees with their current length of service based on their hire date. The records are grouped by location.

**Note**: If multiple managers are allowed, the report may return multiple records for each employee.
Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Length of Service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sen. Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term. Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Base Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Class</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Group</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Length of Service

The **Length of Service** custom field displays the employee’s length of service according to the hire date. It uses the following expression:

```
CASE WHEN HireDate < GETDATE()
    THEN CASE WHEN HireDate < TerminationDate
        THEN CONVERT(NVARCHAR(10), FLOOR((DATEDIFF(DAY, HireDate, TerminationDate) / 365.0))) + ' Years ' + CONVERT(NVARCHAR(10),
            CASE WHEN
            DATEPART(dd, HireDate) <= DATEPART(dd, TerminationDate)
            THEN DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, HireDate, TerminationDate) / 365.0), HireDate),
                      TerminationDate)
            ELSE DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, HireDate, TerminationDate) / 365.0), HireDate),
                      TerminationDate) - 1
            END = -1 THEN 0
            ELSE CASE WHEN DATEPART(dd, HireDate) <= DATEPART(dd, TerminationDate)
            THEN DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, HireDate, TerminationDate) / 365.0), HireDate),
                      TerminationDate)
            ELSE DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, HireDate, TerminationDate) / 365.0), HireDate),
                      TerminationDate) - 1
            END END
    ELSE 0
END
```
THEN DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, HireDate, TerminationDate) / 365.0), HireDate), TerminationDate)
ELSE DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, HireDate, TerminationDate) / 365.0), HireDate), TerminationDate) - 1
END
END)
ELSE CONVERT(NVARCHAR(10), FLOOR(DATEDIFF(DAY, HireDate, GETDATE()) / 365.0)) + ' Years ' + CONVERT(NVARCHAR(10),
CASE WHEN
CASE WHEN DATEPART(dd, HireDate) <= DATEPART(dd, GETDATE())
THEN DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, HireDate, GETDATE()) / 365.0), HireDate), GETDATE())
ELSE DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, HireDate, GETDATE()) / 365.0), HireDate), GETDATE()) - 1
END = -1 THEN 0
ELSE
CASE WHEN DATEPART(dd, HireDate) <= DATEPART(dd, GETDATE())
THEN DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, HireDate, GETDATE()) / 365.0), HireDate), GETDATE())
ELSE DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, HireDate, GETDATE()) / 365.0), HireDate), GETDATE()) - 1
END + ' Months'
ELSE ''
END

**Filters**

The template includes the following filters:

- **Time Period**
  - Between: 1/30/2017
  - End Date

- **And**
  - **Primary Work Assignment**
    - Equal: True
  - **Location**
    - In: Select an Option...
  - **Employment Status Group Name**
    - In:
**Length of Service by Position**

The Length of Service by Position report uses the HR Profile topic to display a list of active employees with their current length of service based on their hire date. The records are grouped by position.

**Note:** If multiple managers are allowed, the report may return multiple records for each employee.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Length of Service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term. Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Base Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Class</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Group</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Length of Service**

The **Length of Service** custom field displays the employee’s length of service according to the hire date. It uses the following expression:

```sql
CASE WHEN HireDate < GETDATE()
    THEN CASE WHEN HireDate < TerminationDate
        THEN CONVERT(NVARCHAR(10), FLOOR((DATEDIFF(DAY, HireDate, TerminationDate) / 365.0))) + ' Years ' + CONVERT(NVARCHAR(10), CASE WHEN DATEPART(dd, HireDate) <= DATEPART(dd, TerminationDate)
        THEN DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY, HireDate, TerminationDate) / 365.0), HireDate), TerminationDate)
        END)
    END
    ELSE 'Less than one year'
END
```
ELSE DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY,
HireDate, TerminationDate) / 365.0), HireDate),
TerminationDate) - 1

END = -1 THEN 0
ELSE
CASE WHEN DATEPART(dd, HireDate) <= DATEPART(dd, TerminationDate)

THEN DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY,
HireDate, TerminationDate) / 365.0), HireDate),
TerminationDate)
ELSE DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY,
HireDate, TerminationDate) / 365.0), HireDate),
TerminationDate) - 1

END
END)
ELSE CONVERT(NVARCHAR(10), FLOOR(DATEDIFF(DAY, HireDate, GETDATE())
/ 365.0)) + ' Years ' + CONVERT(NVARCHAR(10),
CASE WHEN

CASE WHEN DATEPART(dd, HireDate) <= DATEPART(dd,
GETDATE())
THEN DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY,
HireDate, GETDATE()) / 365.0), HireDate), GETDATE())
ELSE DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY,
HireDate, GETDATE()) / 365.0), HireDate), GETDATE()) - 1
END = -1 THEN 0

ELSE

CASE WHEN DATEPART(dd, HireDate) <= DATEPART(dd,
GETDATE())
THEN DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY,
HireDate, GETDATE()) / 365.0), HireDate), GETDATE())
ELSE DATEDIFF(MONTH, DATEADD(YEAR, FLOOR(DATEDIFF(DAY,
HireDate, GETDATE()) / 365.0), HireDate), GETDATE()) - 1

END
END)
END + ' Months'
ELSE ''
END

Filters

The template includes the following filters:

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Manager-Employee Assignment

The Manager-Employee Assignment report uses the Employee Details - Personal topic to display information about employee-manager assignments, with the records grouped by manager. For example, a user might generate this report to see which employees report to a specific manager.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager As Of</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager Derived Method</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Manager Derived Method

The Manager Derived Method field displays the manager derived method. It uses the following expression:

```
CASE
    WHEN EmployeeManager.DerivationMethod = 1 THEN 'Direct Report'
    WHEN EmployeeManager.DerivationMethod = 2 THEN 'Derived by Org'
    WHEN EmployeeManager.DerivationMethod = 3 THEN 'Derived by Position'
ELSE ''
END
```
Filters

The template includes the following filters:

Filters

- Effective Start
- Effective End
- Include my current employees only

Minimum Wage Change

The Minimum Wage Change report uses the Pay Wage Change topic to display information about employees who have received a raise or who were qualified for a raise to their minimum wage based on configuration in the Minimum Wage screen. The report output displays a list of wage changes sorted by the effective start date, with the employee’s name, current rate, and new rate.

The details in this topic and template are up to date as of the last time the Employee Minimum Wage Update background job was run.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Start</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
New Hires

The New Hires report uses the HR Profile topic to display a list of active employees grouped by department. It contains information about the employees such as hire date, seniority date, status, location, position title, manager, pay type, and pay class. You can use this template to view a list of active employees in each department and their work information.

**Note:** Multiple rows may be displayed for employees who are assigned more than one manager.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Recent Hire Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Original Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Class</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Group</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Base Rate

Gender

Filters

The template includes the following filters:

New Hires by Location

The New Hires by Location report uses the HR Profile topic to display a list of employees with a recent hire date within the report date range, with the records grouped by location. You can use this template to report on the new hires at each location of your organization, within a date range or as of a specific date. This report includes records for both completely new employees and rehires.

Note: Multiple rows may be displayed for employees who are assigned more than one manager.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Recent Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Original Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Manager
Pay Class
Pay Group
Base Rate
Gender

Filters

The template includes the following filters:

Field Name | Group by | Sort Order | Totals
---|---|---|---
Location | Yes | Ascending | 
Employee | | | 
Term. Date | | | 
Term. Type | | | 
Status Reason | | | 
Seniority Date | | | 

Terminated Employees by Location

The Terminated Employees by Location report uses the HR Profile topic to display details for employees with a terminated employment status, with the records listed by location. You can use this report to view a list of terminated employees in each location, with the employment and work information that you need to perform post-employment procedures.

**Note:** If multiple managers are allowed, multiple rows per employee may be displayed.

Fields

The template includes the following fields:
The **Term. Type** custom field displays the type of termination for the employee. It uses the following expression:

```sql
CASE WHEN EmploymentStatusReason.IsVoluntaryReason = 'true' THEN 'Voluntary' WHEN EmploymentStatusReason.IsVoluntaryReason = 'false' THEN 'Involuntary' ELSE 'Unknown' END
```

**Filters**

The template includes the following filters:

```
And Time Period Equal True
And Primary Work Assignment Equal @EffectiveEnd
And Term. Date Less Than Equal @EffectiveStart
And Term. Date Greater Than Equal Terminated
And Employment Status Group Name In Terminated
```

**Turnover by Location**

The Turnover by Location report uses the Employee Turnover topic to display the headcount of employees at the start and end date of the selected time period along with the terminated employee counts, turnover rate, termination reason and gender of the employee. This report displays data from the last complete calendar quarter by default. The standard turnover rate formula is used in the report:

```
Total Termination (end of period) / ((Headcount at Start + Headcount at End)/2) * 100.
```

**Note:** It is recommended that you add only custom fields to this report. Adding standard fields can affect the data accuracy.
**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Headcount At Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Headcount At End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Terminations At End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turnover Rate</td>
<td></td>
<td></td>
<td>Custom</td>
</tr>
<tr>
<td>Voluntary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Involuntary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reason Not Specified</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gender Not Specified</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Headcount At Start**

The **Headcount At Start** custom field displays the number of employees who had the selected employee status at the start of the period. It uses the following expression:

```
COUNT(CASE WHEN @EffectiveStart BETWEEN StatusAtStartCustom.EffectiveStart
AND ISNULL(StatusAtStartCustom.EffectiveEnd, DATEADD(YEAR, 50, GETDATE()))
AND StatusAtStartCustom.EmploymentStatusId IS NOT NULL THEN 'Y' ELSE NULL END)
```

**Headcount At End**

The **Headcount At End** custom field displays the number of employees who had the selected employment status at the end of the period. It uses the following expression:

```
COUNT(CASE WHEN @EffectiveEnd BETWEEN StatusAtEndCustom.EffectiveStart AND
ISNULL(StatusAtEndCustom.EffectiveEnd, DATEADD(YEAR, 50, GETDATE()))
AND StatusAtEndCustom.EmploymentStatusId IS NOT NULL THEN 'Y' ELSE NULL END)
```

**Terminations At End**

The **Terminations At End** custom field displays the number of terminated employees at the end of the period. It uses the following expression:

```
COUNT(CASE WHEN @EffectiveEnd BETWEEN TerminationAtEndCustom.EffectiveStart AND
ISNULL(TerminationAtEndCustom.EffectiveEnd, DATEADD(YEAR, 50, GETDATE()))
AND TerminationAtEndCustom.EmploymentStatusId IS NOT NULL THEN 'Y' ELSE NULL END)
```
Turnover Rate

The **Turnover Rate** custom field displays the turnover rate. It uses the following expression:

```
ISNULL(CONVERT(DECIMAL(19, 2), ROUND(((COUNT(CASE WHEN @EffectiveEnd BETWEEN TerminationAtEndCustom.EffectiveStart AND ISNULL(TerminationAtEndCustom.EffectiveEnd, DATEADD(YEAR, 50, GETDATE())) AND TerminationAtEndCustom.EmploymentStatusId IS NOT NULL THEN 'Y' ELSE NULL END) / (NULLIF((COUNT(CASE WHEN @EffectiveStart BETWEEN StatusAtStartCustom.EffectiveStart AND ISNULL(StatusAtStartCustom.EffectiveEnd, DATEADD(YEAR, 50, GETDATE()))) AND StatusAtStartCustom.EmploymentStatusId IS NOT NULL THEN 'Y' ELSE NULL END) + COUNT(CASE WHEN @EffectiveEnd BETWEEN StatusAtEndCustom.EffectiveStart AND ISNULL(StatusAtEndCustom.EffectiveEnd, DATEADD(YEAR, 50, GETDATE())) AND StatusAtEndCustom.EmploymentStatusId IS NOT NULL THEN 'Y' ELSE NULL END)) / 2.0, 0.0)) * 100.0, 2)), 0.0)
```

Voluntary

The **Voluntary** custom field displays the number of employees who were terminated with a voluntary reason. It uses the following expression:

```
COUNT(CASE WHEN [TerminationAtEndCustom].EmploymentStatusId IS NOT NULL AND EmploymentStatusReason.IsVoluntaryReason = 1 Then 'Y' ELSE NULL END)
```

Involuntary

The **Involuntary** custom field displays the number of employees who were terminated with an involuntary reason. It uses the following expression:

```
COUNT(CASE WHEN [TerminationAtEndCustom].EmploymentStatusId IS NOT NULL AND EmploymentStatusReason.IsVoluntaryReason = 0 Then 'Y' ELSE NULL END)
```

Reason Not Specified

The **Reason Not Specified** custom field displays who were terminated without a specified reason. It uses the following expression:

```
COUNT(CASE WHEN [TerminationAtEndCustom].EmploymentStatusId IS NOT NULL AND EmploymentStatusReason.IsVoluntaryReason IS NULL Then 'Y' ELSE NULL END)
```

Female

The **Female** custom field displays the number of female employees who were terminated. It uses the following expression:

```
COUNT(CASE WHEN [TerminationAtEndCustom].EmploymentStatusId IS NOT NULL AND Employee.Gender = 'F' THEN 'Y' ELSE NULL END)
```

Male

The **Male** custom field displays the number of male employees who were terminated. It uses the following expression:
COUNT(CASE WHEN [TerminationAtEndCustom].EmploymentStatusId IS NOT NULL
AND Employee.Gender = 'M' THEN 'Y' ELSE NULL END)

**Gender Not Specified**

The **Gender Not Specified** custom field displays the number of terminated employees who did not have a specified gender. It uses the following expression:

COUNT(CASE WHEN [TerminationAtEndCustom].EmploymentStatusId IS NOT NULL
AND Employee.Gender IS NULL THEN 'Y' ELSE NULL END)

**Filters**

This template includes the following filters:

![Filters](image)

**Events**

The **Human Resources > Events** category contains reports about HR Incidents that have occurred in the organization. The data for these reports comes from the **HR Incidents** tab in My HR and **HR Admin > HR Incidents**.

**HR Incidents**

The HR Incidents report uses the Safety and Health Incidents topic to display information about HR incidents, including employee name, incident date, and case number.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employment Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Incident Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Case No</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Filters

The template includes the following filters:

- And Incident Date Greater Than Equal *
- And Incident Date Less Than Equal
- And Manager Effective End Empty
- And Employee Employment Status Effective End Empty

Export Template

The Human Resources > Export Template category contains reports that can be used as templates to export data, such as ConnectedPay data for an ICP.

ConnectedPay - Employee Properties Export

Before You Begin: Although this report is available for all clients, it only generates data if you have ConnectedPay. If you don’t have ConnectedPay, this report doesn’t generate any data.

Administrators can use the ConnectedPay - Employee Properties Export report to export data to a non-Ceridian ICP for payroll processing. The report uses the topic by the same name to display core employee details and ConnectedPay employee properties that are required by an ICP to process payroll.

Learning Reports

The Learning category contains reports that you can use to view information from the Learning Management module.

Certifications

The Learning > Certifications category contains reports that you can use to view information about employee certifications.
Employee Certifications

The Employee Certifications report uses the Employee Certifications topic to display a list of employees and the certifications that they currently hold.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Certification</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Effective Start</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Effective End</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Assigned By</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Assigned By

The Assigned By custom field displays who assigned the certification. It uses the following expression:

```
CASE
    WHEN [LMSEmployeeCertification].[AssignedByUserId] IS NOT NULL THEN [EmployeeManager].ManagerDisplayName
    WHEN [LMSEmployeeCertification].[TrainingProgramId] IS NOT NULL THEN COALESCE(TrainingProgramCulture.ShortName, TrainingProgram.ShortName)
    WHEN [LMSEmployeeCertification].[CourseId] IS NOT NULL THEN COALESCE(CourseCulture.ShortName, Course.ShortName)
END
```

Filters

The template includes the following filters:
Expiring Certifications

The Expiring Certifications report uses the Employee Certifications topic to display a list of employee certifications that are going to expire in the next 30 days.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Days Until Expiration</td>
<td></td>
<td>Smallest to largest</td>
<td></td>
</tr>
<tr>
<td>Certification</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Effective End</td>
<td></td>
<td>Oldest to newest</td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Days Until Expiration

The Days Until Expiration custom field displays the number of days remaining before the certification expires. It uses the following expression:

\[
\text{DATEDIFF}(dd, \text{CURRENT\_TIMESTAMP}, \text{LMSEmployeeCertification.EffectiveEnd})
\]

Filters

The template includes the following filters:
Courses and Learning Plans

The Learning > Courses and Learning Plans category contains reports that you can use to view information about the courses and learning plans that are configured in the Learning Setup feature.

Employee Course Enrollment Details

The Employee Course Enrollment Details report uses the Employee Course Details topic to display details about course enrollments that are currently in progress.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Course</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Course Start Date</td>
<td></td>
<td>Oldest to newest</td>
<td></td>
</tr>
<tr>
<td>Course Type</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Enrollment Type</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
Employee Course Results

The Employee Course Results report uses the Employee Course Details topic to display details of course results such as score, enrollment status, and course completion date.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Course Start Date</td>
<td></td>
<td>Oldest to newest</td>
<td></td>
</tr>
<tr>
<td>Course Result</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Course Score</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Course Enrollment Status</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Completion Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
Onboarding Reports

The Onboarding category contains reports that display information from the Onboarding feature.

Onboarding Tasks

The Onboarding > Onboarding Tasks category contains reports that display information about the onboarding tasks that are configured for your new hires. This includes information such as task status, task type, due date, completed date, and employee and manager details.

Incomplete Tasks Due Within N Days

The Incomplete Tasks Due Within N Days report uses the Onboarding Details topic to display a list of onboarding tasks that are due within a selected number (N) of days. You can use this report to view a list of tasks that have upcoming due dates. By default, the report is filtered to display records with a Hire Date of today’s date.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Due Date</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Filters**

The template includes the following filters:

![Filters](image)

**Onboarding Tasks by Due Date**

The Onboarding Tasks by Due Date report uses the Onboarding Details topic to display a list of due dates and all associated tasks with details including task status, task type, and employee. By default, the report is filtered to display records with a **Hire Date** of today’s date.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The Onboarding Tasks by New Hire report uses the Onboarding Details topic to display a list of new hires and all of the tasks that have been assigned to them, along with their employee details, current work assignment, and manager. By default, the report is filtered to display records with a Hire Date of today’s date.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Field Name</td>
<td>Group by</td>
<td>Sort Order</td>
<td>Totals</td>
</tr>
<tr>
<td>------------------</td>
<td>----------</td>
<td>------------</td>
<td>--------</td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:

- **Time Period**: Between
- **End Date**: 8/14/2017
- **Employee Display Name**: Please select a value
- **Hire Date**: Less Than Equal to @EffectiveEnd
- **Hire Date**: Greater Than Equal to @EffectiveStart
- **Task Name**: Equal
- **Onboarding Policy Name**: In
- **Work Assignment Effective End**: Empty
- **Manager Effective End**: Empty

**Onboarding Tasks by Task Name**

The Onboarding Tasks by Task Name report uses the Onboarding Details topic to display a list of onboarding tasks for new hires and their employee details with current work assignment and manager details.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>-----------</td>
<td>-----</td>
<td>-------</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Task Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Due Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Completed Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Filters

The template includes the following filters:

- **Time Period**: Between Start Date and End Date
- **Employee Display Name**: Choose Employees

### Onboarding Tasks by Task Status

The Onboarding Tasks by Task Status report uses the Onboarding Details topic to display a list of task statuses and their associated task details, with the records grouped by their status.

### Fields

The template includes the following fields:
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Due Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Task Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Completed Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:

**Onboarding Tasks Past Due**

The Onboarding Tasks Past Due report uses the Onboarding Details topic to display a list of incomplete new hire tasks that have passed their due dates, with employee details including current work assignment and manager.

**Fields**

The template includes the following fields:
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Task Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Due Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Days Past Due</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:

The **Organization** category contains reports that display information about your organization’s jobs and positions. HR administrators can use these reports to view information such as headcounts and equal employment opportunity information.
Jobs

The Organization > Jobs category contains reports that display information about the jobs that are configured for your organization in Org Setup > Jobs and Positions.

Jobs with No EEO Designation

The Jobs with No EEO Designation report uses the Job Configuration Data topic to display jobs that have been configured without an EEO-1 Category.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>EEO-1 Job Category</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Family</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Function</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:

Filters

And EEO-1 Job Category Empty

Positions

The Organization > Positions category contains reports that display information about the positions that are configured for your organization in Org Setup > Jobs and Positions.

Position Management

The Position Management report uses the Position Management topic to display budgeted, actual, and open position headcount, as well as the name, department, and location of each position.

Fields

The template contains the following fields:
### Field Name

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Budgeted Headcount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual Headcount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td># of Openings</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Custom Fields

#### Actual Headcount

The Actual Headcount field displays the actual position headcount. It uses the following expression:

\[
\text{SUM(HRDeptJobHeadCount.ActualHeadCount)}
\]

#### # of Openings

The # of Openings field displays the open position headcount. It uses the following expression:

\[
\text{DeptJobAssignment.BudgetedHeadCount} - \text{SUM(HRDeptJobHeadCount.ActualHeadCount)}
\]

### Filters

The template contains the following filters:

- And Employee Employment Status Effective End Empty
- And Work Assignment Effective End Empty
- And Position Effective End Empty

### Payroll Reports

The Payroll category contains reports that display your organization's payroll information. The data for these reports comes from the Payroll feature and from the pay register.
Miscellaneous

401k Details

The 401k Details template uses the Payroll - Deduction Details topic to display information on an employees' 401k profiles, including employee details, deduction name, and state and federal amounts.

Fields

This template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee SSN/SIN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Original Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rehire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employment Start Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Class</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Class Ledger Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Default Normal Weekly Hours</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deduction</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fixed Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Defined Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Defined Percent</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Additional Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Additional Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arrears Payment Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

This template includes the following filters:
When you run this report, you can configure the filters as follows:

- **Effective Start**: Report results include records with Pay Run Result Committed Pay Date on this date and later (mandatory).
- **Effective End**: Report results include records with Pay Run Result Committed Pay Date up to this date.
- **Include my current employees only**: Select True and the report includes records for all employees that you have access to now, regardless of the time period you specified for the report. Select False and the report includes all employees that you had access to during the specified time period.
  
  **Note**: This option is only available if you have access to the Historical Employee Data feature. If you don’t see this option when you run the report, the report will only include records for the employees you currently have access to, regardless of the time period.
- **Pay Run Deduction Committed Pay Date**: Report includes records that have a Pay Run Deduction Committed Pay Date between the Employee Employment Status Effective Start and End dates.
- **Pay Run Result Committed Pay Date**: This filter takes the dates that you entered for Effective Start and Effective End.
- **Deduction**: Select the deductions in the drop-down list that you want to include in the report.
- **Work Assignment Effective End**: Report includes records that don’t have a Work Assignment Effective End date.

**ACA - Payroll with Earning Codes**

The ACA - Payroll with Earning Codes report uses the ACA - Payroll with Earning Codes topic to display average work hours based on the earning hours data from the Payroll feature and earning codes and measurement period start and end dates entered at report run time.
Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Original Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employment Status Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Hours</td>
<td></td>
<td></td>
<td>Column Total:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Sum</td>
</tr>
<tr>
<td>Average Daily Hours</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average Weekly Hours</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average Monthly Hours</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Average Daily Hours

The **Average Daily Hours** custom field displays the average daily hours. It uses the following expression:

```sql
CAST(SUM(PRPayRunEarningPermanent.Units / PPACACustom.DaysInMeasurementPeriod) AS DECIMAL(19, 3))
```

Average Weekly Hours

The **Average Weekly Hours** custom field displays the average weekly hours. It uses the following expression:

```sql
CAST(SUM(PRPayRunEarningPermanent.Units / PPACACustom.WeeksInMeasurementPeriod) AS DECIMAL(19, 3))
```

Average Monthly Hours

The **Average Monthly Hours** custom field displays the average monthly hours. It uses the following expression:

```sql
CAST(SUM(PRPayRunEarningPermanent.Units / PPACACustom.MonthsInMeasurementPeriod) AS DECIMAL(19, 3))
```
Filters

This template includes the following filters:

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deduction</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deduction Schedule</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deduction Effective Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deduction Effective End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deduction Source</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arrear Multiple Limit Option</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deduction Param Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deduction Param Default Value</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deduction Param Value</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deduction Limit Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deduction Default</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deduction Default Limit Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deduction Default Limit Percent</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Employee Deduction Limit Limit Amount
Employee Deduction Limit Limit Percent

Custom Fields

Deduction Param Name

The Deduction Param Name custom field displays the deduction parameter name. It uses the following expression:

\[
\text{COALESCE(PRDeductionParam.ShortName, EmployeePayrollProfilePRDeduction.DFElementParamShortName)}
\]

Filters

The following filters are configured for the template:

Filters

- Start Date
- End Date

And Employment Status Group Name In

And Deduction Name Not Empty

Or Earning Name Not Empty

And Work Assignment Effective End Empty

And Employee Name In

Employee Payroll Earnings Profile

The Employee Payroll Earnings Profile report uses the Employee Payroll Profile topic to display employee payroll earnings based on the values specified in My HR > Payroll Elections > Earnings.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earning</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earning Schedule</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------------</td>
<td>---</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earning Effective Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earning Effective End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earning Source</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earning Work Assignment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earning Param Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earning Param Default Value</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earning Param Value</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earning Limit Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earning Limit Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earning Default Limit Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earning Default Limit Percent</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Earning Limit Limit Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Earning Limit Limit Percent</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Earning Work Assignment**

The **Earning Work Assignment** custom field displays the earning work assignment. It uses the following expression:

```
DeptJob.ShortName + ' ' + OrgUnit.ShortName
```

**Earning Param Name**

The **Earning Param Name** custom field displays the earnings parameter name. It uses the following expression:

```
COALESCE(PREarningParam.ShortName,
EmployeePayrollProfilePREarning.DFElementParamShortName)
```

**Filters**

The following filters are configured for the template:
Workers Compensation

The Workers Compensation report is based on the Workers Compensation topic. This template allows users to report on details such as WCB account numbers and employee information (e.g., name, pay group, etc.).

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>WCB Code</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee Display Name</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>WCB Account Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee State Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal Entity Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Group Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Badge</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employer Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employer Total Committed Premium</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Employee Total Committed Premium**

**Total WCB Assessable Value**

**Total Limited WCB Assessable Value**

**Total Excess Value**

### Custom Fields

#### Total Excess Value

The **Total Excess Value** custom field displays the workers compensation total excess value. It uses the following expression:

\[
\text{ISNULL(PRPayRunWorkersCompView.TotalWcbAssessableWages, 0)} - \text{ISNULL(PRPayRunWorkersCompView.LimitedWCBAssessableWages, 0)}
\]

### Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Start</td>
<td>*</td>
</tr>
<tr>
<td>Effective End</td>
<td>*</td>
</tr>
</tbody>
</table>

And Pay Group Name In

- Please select a value

### Payroll Audits

The **Payroll > Payroll Audits** category contains reports that display payroll audit information.

#### Active Employees Not Paid

The Active Employees Not Paid audit report uses the Pay Run - Employee Details topic to return results for active status employees with no pay for the selected pay group and pay period.

### Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
</table>
Number
Display Name
Status Group
Department
Pay Type Group
Location

**Filters**

The template includes the following filters:

![Filters](image)

**Deduction Limit Violations**

The Deduction Limit Violations audit report uses the Pay Run - Deductions topic to return results for employees with deductions that exceed any limits set on those deductions (configured in Payroll Setup > Deduction Definition) for the selected pay group and pay period.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal Entity Name</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Number</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Limit Type</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deduction Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expected Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Limit Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Over Limit Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Template</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Type</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run</td>
</tr>
<tr>
<td>Pay Group: Select an...</td>
</tr>
<tr>
<td>And</td>
</tr>
</tbody>
</table>

Deductions Not Taken

The Deductions Not Taken audit report uses the Pay Run - Employee Deductions topic to return results for any employees with scheduled deductions that were not taken for the selected pay group and pay period.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deduction Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amount Not Taken</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal Entity Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Template</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Amount Not Taken

The Amount Not Taken custom field displays the difference between the scheduled deduction amount and the amount that was actually taken. It uses the following expression:

```
CASE WHEN DeductionAmount < 0 THEN DeductionScheduledAmount ELSE DeductionScheduledAmount - DeductionAmount END
```
Duplicate Bank Accounts

The Duplicate Bank Accounts audit report uses the Pay Run - Employee Bank accounts topic to return results if the number of duplicate bank accounts for the selected pay group and pay period exceeds the amount set in System Admin > Client Properties in the Client Payroll Properties tab.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Count</td>
<td>Z to A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Display Name</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Account Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:

Earning Limit Violations

The Earning Limit Violations audit report uses the Pay Run - Earning Limit Violations topic to return results for any employees with earnings that exceed any limits set for the earnings in question (configured in Payroll Setup > Earning Definition) for the selected pay group and pay period.

Fields

The template includes the following fields:
### Field Name

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal Entity Name</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earning Name</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Limit Type</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expected Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Limit Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Over Limit Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Template</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Type</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run</td>
</tr>
</tbody>
</table>

### Employee Primary Address Change

The Employee Primary Address Change audit report uses the Pay Run - Employee Address Changes topic to return results for any employees whose primary address changed during the selected pay group's selected pay period.

### Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postal Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>County</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Filters

The template includes the following filters:

Inactive Employees

The Inactive Employees audit report uses the Pay Run - Employee Details topic to return results for any employees whose status changed to inactive during the selected pay group's selected pay period.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status Group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Terminated On Pay Period</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
Invalid SSN-SIN

The Invalid SSN-SIN audit report uses the Pay Run - Invalid SSN topic to return results for any employees with invalid Social Security Numbers or Social Insurance Numbers during the selected pay group's selected pay period.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SIN/SSN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expiry Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run</td>
<td></td>
</tr>
<tr>
<td>* Pay Group</td>
<td></td>
</tr>
<tr>
<td>Selected</td>
<td></td>
</tr>
<tr>
<td>Selected</td>
<td></td>
</tr>
<tr>
<td>Period</td>
<td></td>
</tr>
<tr>
<td>Option...</td>
<td></td>
</tr>
</tbody>
</table>

Missing Employee Org Assignment

The Missing Employee Org Assignment audit report uses the Pay Run - Employee Missing Org topic to return results for any employees who do not have org assignments during the selected pay group's selected pay period.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Display</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Source Org Unit Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Source Effective Start</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Filters

The template includes the following filters:

![Filters](image)

Multi-State Threshold Taxation Status

The Multi-State Threshold Taxation Status report uses the Multi-State Threshold Taxation topic to return results for the number of multi-state taxation thresholds that have been affected by earnings in the selected pay group and pay period.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>State</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Type</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Remainder</td>
<td></td>
<td>Smallest to Largest</td>
<td></td>
</tr>
<tr>
<td>Threshold</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Period Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Balance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attained</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Remainder

The **Remainder** custom field displays the remainder amount. It uses the following expression:

```
CASE WHEN PRMultiStateThresholdTaxation.Remainder >= 0 THEN PRMultiStateThresholdTaxation.Remainder ELSE 0.00 END
```
Filters

The template includes the following filters:

```
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SIN/SSN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Deductions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal Entity Name</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

Negative Deductions

The Negative Deductions audit report uses the Pay Run - Result topic to return results for any negative deduction amounts for employees in the selected pay group and pay period.

Fields

The template includes the following fields:

```
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SIN/SSN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Deductions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal Entity Name</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```
The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run</td>
</tr>
<tr>
<td>* Pay Group</td>
</tr>
</tbody>
</table>

The Negative Earnings audit report uses the Pay Run - Result topic to return results for any negative earning amounts for employees in the selected pay group and pay period.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SIN/SSN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Earnings</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal Entity Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Template</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The template includes the following filters:
**Negative Taxes**

The Negative Taxes audit report uses the Pay Run - Employee taxes topic to return results for any negative tax amounts for employees in the selected pay group and pay period.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tax Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tax Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal Entity Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Template</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:

![Filters](image)

**Negative Total Taxes**

The Negative Total Taxes audit report uses the Pay Run - Result topic to return results for any negative total tax amounts for employees in the selected pay group and pay period.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SIN/SSN</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Total Employer Taxes
Total Employee Taxes
Legal Entity Name
Check Type
Check Template

Filters
The template includes the following filters:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Business Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total WFM Hours</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hours Paid Mapped</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payroll</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hours Paid Difference</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Paid Out in Advance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Payroll Retroactive Pay</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run</td>
</tr>
<tr>
<td>* Pay Group</td>
</tr>
<tr>
<td>Selected Period</td>
</tr>
<tr>
<td>Selected Option</td>
</tr>
<tr>
<td>And Is Paid Out in Advance Equal True</td>
</tr>
<tr>
<td>And Is Payroll Retroactive Pay Equal False</td>
</tr>
</tbody>
</table>

Terminated Employees

The Terminated Employees audit report uses the Pay Run - Employee Details topic to return results for any employees whose status changed to terminated during the selected pay group's selected pay period.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status Group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Employee Terminated On Pay Period</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run</td>
</tr>
<tr>
<td>* Pay Group</td>
</tr>
<tr>
<td>Selected Period</td>
</tr>
<tr>
<td>Selected Option</td>
</tr>
<tr>
<td>And Include Employee in Terminated Employees Report Equal True</td>
</tr>
</tbody>
</table>
**Zero Dollar Checks**

The Zero Dollar Checks audit report uses the Pay Run - Zero Dollar Checks topic to return results for any checks with zero dollars for the selected pay group and pay period.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Type Group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal Entity Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Template</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:

![Filters](image)

**Register Data**

The **Payroll > Register Data** category contains reports that display information from the payroll register. You can use the reports in this category to view information about earnings, deductions, garnishments, wages and taxes from the register.

**Categories of Deductions by Pay**

The Categories of Deductions by Pay report uses the Payroll Register by Pay Run topic to display a list of current deductions by employee for each deduction category.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>-------------</td>
<td>-----</td>
<td>-------</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deferred Comp</td>
<td></td>
<td>Column Total: Sum</td>
<td></td>
</tr>
<tr>
<td>Pre Tax</td>
<td></td>
<td>Column Total: Sum</td>
<td></td>
</tr>
<tr>
<td>Post Tax</td>
<td></td>
<td>Column Total: Sum</td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Deferred Comp**

The **Deferred Comp** field displays deferred comp deductions. It uses the following expression:

```sql
CASE
WHEN PRPayRunRegister.RecordType = 'Deduction'
AND PRPayRunRegister.RecordCategory = 'Deferred Compensation'
THEN PRPayRunRegister.Amount
ELSE 0.00
END
```

**Pre Tax**

The **Pre Tax** field displays pre-tax deductions. It uses the following expression:

```sql
CASE
WHEN PRPayRunRegister.RecordType = 'Deduction'
AND PRPayRunRegister.RecordCategory = 'Pre-Tax'
THEN PRPayRunRegister.Amount
ELSE 0.00
END
```

**Post Tax**

The **Post Tax** field displays post tax deductions. It uses the following expression:

```sql
CASE
WHEN PRPayRunRegister.RecordType = 'Deduction'
AND PRPayRunRegister.RecordCategory = 'Post-Tax'
THEN PRPayRunRegister.Amount
ELSE 0.00
END
```

**Filters**

The template includes the following filters:
Categories of Deductions by Range

The Categories of Deductions by Range report uses the Payroll Register by Date Range topic to display a list of employees and their total deductions for each category within the specified date range. You can use this report to analyze deduction amounts by category for a custom date range.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Group</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deferred Comp</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>Pre Tax</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>Post Tax</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
</tbody>
</table>

Custom Fields

Deferred Comp

The Deferred Comp custom field displays the deferred comp deductions. It uses the following expression:

```sql
CASE WHEN PRPayRunRegisterPeriod.RecordType = 'Deduction' AND PRPayRunRegisterPeriod.RecordCategory = 'Deferred Compensation' THEN PRPayRunRegisterPeriod.Amount ELSE 0.00 END
```
The **Pre Tax** custom field displays the pre-tax deductions. It uses the following expression:

```sql
CASE WHEN PRPayRunRegisterPeriod.RecordType = 'Deduction' AND PRPayRunRegisterPeriod.RecordCategory = 'Pre-Tax' THEN PRPayRunRegisterPeriod.Amount ELSE 0.00 END
```

**Post Tax**

The **Post Tax** custom field displays the post-tax deductions. It uses the following expression:

```sql
CASE WHEN PRPayRunRegisterPeriod.RecordType = 'Deduction' AND PRPayRunRegisterPeriod.RecordCategory = 'Post-Tax' THEN PRPayRunRegisterPeriod.Amount ELSE 0.00 END
```

**Filters**

The template includes the following filters:

```
Date Range: Between

Country

Legal Entity Name

Employee Display Name

Record Type: Deduction, Deduction Arrears

Pay Group

Date Range By Register
```

**Categories of Earnings by Pay**

The Categories of Earnings by Pay report uses the Payroll Register by Pay Run topic to display current earnings categories by employee.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
</tbody>
</table>
Normal Earnings

The **Normal Earnings** field displays the current normal earnings. It uses the following expression:

```
CASE
  WHEN PRPayRunRegister.RecordType = 'Earning'
  AND PRPayRunRegister.RecordCategory = 'Normal'
  THEN PRPayRunRegister.Amount
  ELSE 0.00
END
```

Taxable Benefits

The **Taxable Benefits** field displays the current taxable benefits. It uses the following expression:

```
CASE
  WHEN PRPayRunRegister.RecordType = 'Earning'
  AND PRPayRunRegister.RecordCategory = 'Taxable Benefit'
  THEN PRPayRunRegister.Amount
  ELSE 0.00
END
```

Reimbursements

The **Reimbursements** field displays the current reimbursement earnings. It uses the following expression:

```
CASE
  WHEN PRPayRunRegister.RecordType = 'Earning'
  AND PRPayRunRegister.RecordCategory = 'Reimbursement'
  THEN PRPayRunRegister.Amount
  ELSE 0.00
END
```

Memos

The **Memos** field displays the current memo earnings. It uses the following expression:

```
CASE
  WHEN PRPayRunRegister.RecordType = 'Earning'
```

AND PRPayRunRegister.RecordCategory = 'Memo Calc'
THEN PRPayRunRegister.Amount
ELSE 0.00
END

**Filters**

The template includes the following filters:

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Group</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Normal Earnings</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>Taxable Benefits</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>Reimbursements</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>Memos</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
</tbody>
</table>

**Custom Fields**

**Normal Earnings**
The **Normal Earnings** custom field displays the amount of normal earnings for the current range. It uses the following expression:

```sql
CASE
  WHEN PRPayRunRegisterPeriod.RecordType = 'Earning'
  AND PRPayRunRegisterPeriod.RecordCategory = 'Normal'
  THEN PRPayRunRegisterPeriod.Amount
  ELSE 0.00
END
```

**Taxable Benefits**

The **Taxable Benefits** custom field displays the amount of taxable benefits for the current range. It uses the following expression:

```sql
CASE
  WHEN PRPayRunRegisterPeriod.RecordType = 'Earning'
  AND PRPayRunRegisterPeriod.RecordCategory = 'Taxable Benefit'
  THEN PRPayRunRegisterPeriod.Amount
  ELSE 0.00
END
```

**Reimbursements**

The **Reimbursements** custom field displays the amount of reimbursements for the current range. It uses the following expression:

```sql
CASE
  WHEN PRPayRunRegisterPeriod.RecordType = 'Earning'
  AND PRPayRunRegisterPeriod.RecordCategory = 'Reimbursement'
  THEN PRPayRunRegisterPeriod.Amount
  ELSE 0.00
END
```

**Memos**

The **Memos** custom field displays the amount of memo earnings for the current range. It uses the following expression:

```sql
CASE
  WHEN PRPayRunRegisterPeriod.RecordType = 'Earning'
  AND PRPayRunRegisterPeriod.RecordCategory = 'Memo Calc'
  THEN PRPayRunRegisterPeriod.Amount
  ELSE 0.00
END
```

**Filters**

The template includes the following filters:
Categories of Taxes by Pay

The Categories of Taxes by Pay report uses the Payroll Register by Pay Run topic to display current tax categories by employee.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EE Federal Tax</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>EE State/Prov Tax</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>EE Local Tax</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>ER Federal Tax</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>ER State/Prov Tax</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>ER Local Tax</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
</tbody>
</table>

Custom Fields

EE Federal Tax
The **EE Federal Tax** field displays the current employer federal tax. It uses the following expression:

```
CASE
  WHEN PRPayRunRegister.RecordType = 'Tax'
       AND PRPayRunRegister.RecordCategory = 'Federal'
       AND PRPayRunRegister.ImpactsNetPay = 'True'
  THEN PRPayRunRegister.Amount
  ELSE 0.00
END

EE State/Prov Tax

The **EE State/Prov Tax** field displays the EE state/provincial tax. It uses the following expression:

```
CASE
  WHEN PRPayRunRegister.RecordType = 'Tax'
       AND PRPayRunRegister.RecordCategory = 'State/Province'
       AND PRPayRunRegister.ImpactsNetPay = 'True'
  THEN PRPayRunRegister.Amount
  ELSE 0.00
END

EE Local Tax

The **EE Local Tax** field displays the EE local tax. It uses the following expression:

```
CASE
  WHEN PRPayRunRegister.RecordType = 'Tax'
       AND PRPayRunRegister.RecordCategory <> 'Federal'
       AND PRPayRunRegister.RecordCategory <> 'State/Province'
       AND PRPayRunRegister.ImpactsNetPay = 'True'
  THEN PRPayRunRegister.Amount
  ELSE 0.00
END

ER Federal Tax

The **ER Federal Tax** field displays the EE federal tax. It uses the following expression:

```
CASE
  WHEN PRPayRunRegister.RecordType = 'Tax'
       AND PRPayRunRegister.RecordCategory = 'Federal'
       AND PRPayRunRegister.ImpactsNetPay = 'False'
  THEN PRPayRunRegister.Amount
  ELSE 0.00
END

ER State/Prov Tax
The **ER State/Prov Tax** field displays the ER state/provincial tax. It uses the following expression:

```
CASE
  WHEN PRPayRunRegister.RecordType = 'Tax'
  AND PRPayRunRegister.RecordCategory = 'State/Province'
  AND PRPayRunRegister.ImpactsNetPay = 'False'
  THEN PRPayRunRegister.Amount
  ELSE 0.00
END
```

**ER Local Tax**

The **ER Local Tax** field displays the ER local tax. It uses the following expression:

```
CASE
  WHEN PRPayRunRegister.RecordType = 'Tax'
  AND PRPayRunRegister.RecordCategory <> 'Federal'
  AND PRPayRunRegister.RecordCategory <> 'State/Province'
  AND PRPayRunRegister.ImpactsNetPay = 'False'
  THEN PRPayRunRegister.Amount
  ELSE 0.00
END
```

**Filters**

The template includes the following filters:

- **PR Pay Run Id**
- **Legal Entity Name**
- **Employee Display Name**
- **Record Type**
- **Pay Group**
- **Selected Period**

**Categories of Taxes by Range**

The Categories of Taxes by Range report uses the Payroll Register by Date Range topic to display date range sums for tax categories by employee. Administrators can use this report to analyze tax amounts by category for a custom date range.

**Fields**

The template includes the following fields:
Field Name | Group by | Sort Order | Totals
---|---|---|---
Pay Group | Yes | Ascending |
Legal Entity | Yes | Ascending |
Employee
EE Federal Tax | | | Column: Sum
EE State/Prov Tax | | | Column: Sum
EE Local Tax | | | Column: Sum
ER Federal Tax | | | Column: Sum
ER State/Prov Tax | | | Column: Sum
ER Local Tax | | | Column: Sum

**Custom Fields**

**EE Federal Tax**

The **EE Federal Tax** custom field displays the employee amount of federal tax for the date range. It uses the following expression:

```
CASE WHEN PRPayRunRegisterPeriod.RecordType = 'Tax' AND
       PRPayRunRegisterPeriod.RecordCategory = 'Federal' AND
       PRPayRunRegisterPeriod.ImpactsNetPay = 'True' THEN
       PRPayRunRegisterPeriod.Amount ELSE 0.00 END
```

**EE State/Prov Tax**

The **EE State/Prov Tax** custom field displays the employee amount of state or provincial tax for the date range. It uses the following expression:

```
CASE WHEN PRPayRunRegisterPeriod.RecordType = 'Tax' AND
       PRPayRunRegisterPeriod.RecordCategory = 'State/Province' AND
       PRPayRunRegisterPeriod.ImpactsNetPay = 'True' THEN
       PRPayRunRegisterPeriod.Amount ELSE 0.00 END
```

**EE Local Tax**

The **EE Local Tax** custom field displays the employee amount of local tax for the date range. It uses the following expression:

```
CASE WHEN PRPayRunRegisterPeriod.RecordType = 'Tax'
       AND PRPayRunRegisterPeriod.RecordCategory <> 'Federal'
       AND PRPayRunRegisterPeriod.RecordCategory <> 'State/Province'
       AND PRPayRunRegisterPeriod.ImpactsNetPay = 'True'
       THEN PRPayRunRegisterPeriod.Amount
       ELSE 0.00
       END
```

**ER Federal Tax**
The ER Federal Tax custom field displays the employer amount of federal tax for the date range. It uses the following expression:

```
CASE WHEN PRPayRunRegisterPeriod.RecordType = 'Tax' AND
      PRPayRunRegisterPeriod.RecordCategory = 'Federal' AND
      PRPayRunRegisterPeriod.ImpactsNetPay = 'False' THEN
      PRPayRunRegisterPeriod.Amount ELSE 0.00 END
```

**ER State/Prov Tax**

The EE State/Prov Tax custom field displays the employer amount of state or provincial tax for the date range. It uses the following expression:

```
CASE WHEN PRPayRunRegisterPeriod.RecordType = 'Tax' AND
      PRPayRunRegisterPeriod.RecordCategory = 'State/Province' AND
      PRPayRunRegisterPeriod.ImpactsNetPay = 'False' THEN
      PRPayRunRegisterPeriod.Amount ELSE 0.00 END
```

**ER Local Tax**

The EE Local Tax custom field displays the employer amount of local tax for the date range. It uses the following expression:

```
CASE
    WHEN PRPayRunRegisterPeriod.RecordType = 'Tax'
    AND PRPayRunRegisterPeriod.RecordCategory <> 'Federal'
    AND PRPayRunRegisterPeriod.RecordCategory <> 'State/Province'
    AND PRPayRunRegisterPeriod.ImpactsNetPay = 'False'
    THEN PRPayRunRegisterPeriod.Amount
    ELSE 0.00
END
```

**Filters**

The template includes the following filters:
Detailed Check and Deposit by Pay

The Detailed Check and Deposit by Pay report uses the Payroll Register by Pay Run topic to display details about each employee’s payments, including pay period, current amount, disbursement method, and deposit to account. Administrators can use this report to view the detailed amounts of employees’ checks and direct deposits, and use this information to reconcile the amounts impounded by Ceridian or cleared by their bank.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Period</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Disbursement Method</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cur Amt</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Record Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deposit to Account</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
Detailed Garnishments CA by Pay

The Detailed Garnishments CA by Pay report uses the Payroll Register by Pay Run topic to display details about garnishment amounts such as vendor name, current amount, and disbursement method. Administrators can use this report to view the detailed amounts of garnishments for reconciling employee withholding amounts to the impounded totals.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Period</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Vendor Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Cur Amt</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Record Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payee Funded</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sequence Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disbursement Method</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:
Detailed Garnishments US by Pay

The Detailed Garnishments US by Pay report uses the Payroll Register by Pay Run topic to display employee details for reconciling garnishment impounds. Administrators can use this report to review the detailed amounts of garnishments for reconciling employee withholding amounts to the impounded total, and for identifying amounts to be remitted.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Period</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Vendor Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Responsible Remitter</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cur Amt</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Record Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payee Funded</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disbursement Method</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Responsible Remitter

The Responsible Remitter custom field indicates if the client is responsible for remitting funds to an agency, or if Ceridian impounds the funds to remit on the client's behalf. It uses the following expression:
CASE WHEN PRPayRunRegister.RecordType = 'Garnishment' AND PRPayRunRegister.IsHoldDisbursementGarn = 'True' THEN 'Client Responsible' ELSE CASE WHEN PRPayRunRegister.RecordType = 'Garnishment' AND PRPayRunRegister.IsHoldDisbursementGarn = 'False' THEN 'Ceridian Impound' ELSE 'Null' END END

Filters

The template includes the following filters:

Field Name | Group by | Sort Order | Totals
---|---|---|---
Pay Group | Yes | Ascending | 
Legal Entity | Yes | Ascending | 
Employee | Yes | A to Z | 
Record Code | | | 
Date Range Net | | | Column: Sum

Detailed Net Pay by Range

The Detailed Net Pay by Range report uses the Payroll Register by Date Range topic to display the total net pay for each employee within the specified date range.

Filters

The template includes the following filters:
The Detailed Tax Deposit CA by Pay report uses the Payroll Register by Pay Run topic to display details about tax amounts such as tax category, current amount, and disbursement method. Administrators can use this report to view the detailed amounts of taxes for reconciling employee and employer amounts to the impounded totals.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Period</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>RP Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Tax Category-Code</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Cur Amount</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Funds Disbursed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disbursement Method</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Custom Fields

Tax Category-Code

The **Tax Category-Code** custom field displays the tax category-code for the record. It uses the following expression:

```
PRPayRunRegister.RecordCategory + ' - ' + PRPayRunRegister.RecordCode
```

Filters

The template includes the following filters:

### Filters

<table>
<thead>
<tr>
<th>Field</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Period</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Tax Code</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Responsible Remitter</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tax Category</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cur Amt</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Detailed Tax Deposit US by Pay**

The **Detailed Tax Deposit US by Pay** report uses the Payroll Register by Pay Run topic to display details about tax amounts such as tax category, tax code, current amount, and disbursement method. Administrators can use this report to view the detailed amounts of taxes for reconciling employee and employer amounts to the impounded total, and for identifying amounts to be remitted.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Period</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Tax Code</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Responsible Remitter</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tax Category</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cur Amt</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Funds Disbursed

Disbursement Method

### Custom Fields

#### Responsible Remitter

The **Responsible Remitter** custom field indicates if the client is responsible for remitting funds to an agency, or if Ceridian impounds the funds to remit on the client’s behalf. It uses the following expression:

```
CASE WHEN PRPayRunRegister.RecordType = 'Tax' AND
PRPayRunRegister.PayeeDisbursementMethod = 'Cust Resp Taxes' THEN 'Client Responsible'
ELSE CASE WHEN PRPayRunRegister.RecordType = 'Tax' AND
PRPayRunRegister.PayeeDisbursementMethod = 'Impound Tax' THEN 'Ceridian Impound'
ELSE 'Null' END END
```

#### Tax Category

The **Tax Category** custom field uses the following expression:

```
CASE WHEN PRPayRunRegister.RecordType = 'Tax' AND
PRPayRunRegister.RecordCategory <> 'Federal' AND
PRPayRunRegister.RecordCategory <> 'State/Province'
THEN 'Local'
ELSE PRPayRunRegister.RecordCategory END
```

### Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>PR Pay Run Id</td>
<td></td>
</tr>
<tr>
<td>Legal Entity Name</td>
<td>Please select a value</td>
</tr>
<tr>
<td>Employee Display Name</td>
<td>Please select a value</td>
</tr>
<tr>
<td>Record Type</td>
<td>Tax</td>
</tr>
</tbody>
</table>

And **Register by Pay Run Employee Country** Contains **USA**

And **Register by Pay Run Period Current Amount Not Equal** 0

### Detailed Vendor Payments by Pay

The **Detailed Vendor Payments by Pay** report uses the **Payroll Register by Pay Run** topic to display the detailed amounts of payments made to third-party vendors. It includes details about
the payments such as the vendor name, amount, employee, record code, and disbursement method.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Period</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Name of Vendor Paid</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Payment Tracking Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Cur Amount</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>Record Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payee Funded</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disbursement Method</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:

**Filters**

- P R Pay Run Id
- Legal Entity Name
- Employee Display Name
- Record Type

**Earnings and Deductions by Pay**

The Earnings and Deductions by Pay report uses the Payroll Register by Pay Run topic to display current and YTD earning and deduction amounts.
Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Record Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Earnings</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>Current Deductions</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>YTD Earnings</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>YTD Deductions</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
</tbody>
</table>

Custom Fields

**Current Earnings**

The **Current Earnings** field displays the current earnings. It uses the following expression:

```
CASE
  WHEN PRPayRunRegister.RecordType = 'Earning'
  THEN PRPayRunRegister.Amount
  ELSE 0.00 END
```

**Current Deductions**

The **Current Deductions** field displays the current deductions. It uses the following expression:

```
CASE
  WHEN PRPayRunRegister.RecordType = 'Deduction'
  THEN PRPayRunRegister.Amount
  ELSE 0.00 END
```

**YTD Earnings**

The **YTD Earnings** field displays year-to-date earnings. It uses the following expression:

```
CASE
  WHEN PRPayRunRegister.RecordType = 'Earning'
  THEN PRPayRunRegister.PayRunAmountYTD
  ELSE 0.00 END
```

**YTD Deductions**
The **YTD Deductions** field displays year-to-date deductions. It uses the following expression:

```sql
CASE
    WHEN PRPayRunRegister.RecordType = 'Deduction'
    THEN PRPayRunRegister.PayRunAmountYTD
    ELSE 0.00
END
```

**Filters**

The template includes the following filters:

**Earnings and Deductions by Range**

The Earnings and Deductions by Range report uses the Payroll Register by Date Range topic to display employees’ YTD and date range totals for selected earning and deduction codes.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Group</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Record Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Range</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earnings</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deductions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>YTD Earnings</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
</tbody>
</table>
YTD Deductions | | | Column Total: Sum

**Custom Fields**

**Date Range Earnings**

The **Date Range Earnings** field displays the earnings amounts for the selected date range. It uses the following expression:

```
CASE
  WHEN PRPayRunRegisterPeriod.RecordType = 'Earning'
  THEN PRPayRunRegisterPeriod.Amount
  ELSE 0.00
END
```

**Date Range Deductions**

The **Current Deductions** field displays the deduction amounts for the selected date range. It uses the following expression:

```
CASE
  WHEN PRPayRunRegisterPeriod.RecordType = 'Deduction'
  THEN PRPayRunRegisterPeriod.Amount
  ELSE 0.00
END
```

**YTD Earnings**

The **YTD Earnings** field displays year-to-date earnings. It uses the following expression:

```
CASE
  WHEN PRPayRunRegister.RecordType = 'Earning'
  THEN PRPayRunRegister.PayRunAmountYTD
  ELSE 0.00
END
```

**YTD Deductions**

The **YTD Deductions** field displays year-to-date deductions. It uses the following expression:

```
CASE
  WHEN PRPayRunRegister.RecordType = 'Deduction'
  THEN PRPayRunRegister.PayRunAmountYTD
  ELSE 0.00
END
```

**Filters**

The template includes the following filters:
Earnings and Hours by Pay

The Earnings and Hours by Pay report uses the Payroll Register by Pay Run topic to display current and YTD hour and earning amounts.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Record Category</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Record Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Hours</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>Current Earnings</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>YTD Hours</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>YTD Earnings</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Filters

The template includes the following filters:

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Group</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Record Category</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Record Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Range Hours</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>Date Range Earnings</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>YTD Hours</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>YTD Earnings</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
</tbody>
</table>
**Custom Fields**

**Date Range Hours**

The **Date Range Hours** custom field displays current hours used with the rate to derive earnings. It uses the following expression:

```
CASE WHEN PRPayRunRegisterPeriod.IsPremiumEarning = 'True' THEN 0.00 ELSE PRPayRunRegisterPeriod.Hours END
```

**YTD Hours**

The **YTD Hours** custom field displays the date range YTD hours. It uses the following expression:

```
CASE WHEN PRPayRunRegisterPeriod.IsPremiumEarning = 'True' THEN 0.00 ELSE PRPayRunRegisterPeriod.HoursYTD END
```

**Filters**

The template includes the following filters:

**Filters**

- **Date Range**
  - Between

- **Country**
  - Please select a value

- **Legal Entity Name**
  - Please select a value

- **Employee Display Name**
  - Please select a value

- **Record Type**
  - Earning

- **And Pay Group**
  - In

- **And Record Code**
  - Contains

- **And Location**
  - In

**Gross to Net by Range**

The **Gross to Net by Range** report uses the Payroll Register by Date Range topic to display a list of employees with their totals for the specified date range of gross, deduction, garnishment, tax, and net.

**Fields**

The template includes the following fields:
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Group</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Gross</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>Deduction</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>Garnishment</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>Tax</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>Net</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
</tbody>
</table>

**Custom Fields**

**Gross**

The **Gross** field displays the gross amount for the date range. It uses the following expression:

```sql
CASE WHEN PRPayRunRegisterPeriod.RecordType = 'Earning' AND
      PRPayRunRegisterPeriod.ImpactsNetPay = 'True' THEN
      PRPayRunRegisterPeriod.Amount ELSE 0.00 END
```

**Deductions**

The **Deductions** field displays the deduction amount for the date range. It uses the following expression:

```sql
CASE WHEN PRPayRunRegisterPeriod.RecordType = 'Deduction' AND
      PRPayRunRegisterPeriod.ImpactsNetPay = 'True' THEN
      PRPayRunRegisterPeriod.Amount ELSE 0.00 END
```

**Garnishments**

The **Garnishments** field displays the garnishments amount for the date range. It uses the following expression:

```sql
CASE WHEN PRPayRunRegisterPeriod.RecordType = 'Garnishment' AND
      PRPayRunRegisterPeriod.ImpactsNetPay = 'True' THEN
      PRPayRunRegisterPeriod.Amount ELSE 0.00 END
```

**Taxes**

The **Taxes** field displays the tax amount for the date range. It uses the following expression:

```sql
CASE WHEN PRPayRunRegisterPeriod.RecordType = 'Tax' AND
      PRPayRunRegisterPeriod.ImpactsNetPay = 'True' THEN
      PRPayRunRegisterPeriod.Amount ELSE 0.00 END
```

**Net**

The **Net** field displays the net amount for the date range. It uses the following expression:
CASE WHEN PRPayRunRegisterPeriod.RecordType = 'Net' THEN
PRPayRunRegisterPeriod.Amount ELSE 0.00 END

**Filters**

The template includes the following filters:

![Filters](image)

**Gross to Net Current by Check**

The Gross to Net Current by Check report uses the Payroll Register by Pay Run topic to display current total gross to net amounts by check.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run Name</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Check Order</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Check Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Curr Gross</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>Curr Deductions</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>Curr Garnishments</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>Curr Taxes</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>Curr Net</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
</tbody>
</table>
Custom Fields

Curr Gross

The **Curr Gross** field displays the current gross amount. It uses the following expression:

```sql
CASE WHEN PRPayRunRegister.RecordType = 'Earning' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN PRPayRunRegister.Amount ELSE 0.00 END
```

Curr Deductions

The **Curr Deductions** field displays the current deduction amount. It uses the following expression:

```sql
CASE WHEN PRPayRunRegister.RecordType = 'Deduction' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN PRPayRunRegister.Amount ELSE 0.00 END
```

Curr Garnishments

The **Curr Garnishments** field displays the current garnishments amount. It uses the following expression:

```sql
CASE WHEN PRPayRunRegister.RecordType = 'Garnishment' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN PRPayRunRegister.Amount ELSE 0.00 END
```

Curr Taxes

The **Curr Taxes** field displays the current tax amount. It uses the following expression:

```sql
CASE WHEN PRPayRunRegister.RecordType = 'Tax' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN PRPayRunRegister.Amount ELSE 0.00 END
```

Curr Net

The **Curr Net** field displays the current net amount. It uses the following expression:

```sql
CASE WHEN PRPayRunRegister.RecordType = 'Net' THEN PRPayRunRegister.Amount ELSE 0.00 END
```

Filters

The template includes the following filters:
The Gross to Net Current by Pay report uses the Payroll Register by Pay Run topic to display current total gross to net amounts by employee.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Curr Gross</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>Curr Deductions</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>Curr Garnishments</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>Curr Taxes</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>Curr Net</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
</tbody>
</table>

**Custom Fields**

**Curr Gross**

The **Curr Gross** field displays the current gross amount. It uses the following expression:

```sql
CASE
  WHEN PRPayRunRegister.RecordType = 'Earning'
  AND PRPayRunRegister.ImpactsNetPay = 'True'
  THEN PRPayRunRegister.Amount
  ELSE 0.00
END
```

**Curr Deductions**
The **Curr Deductions** field displays the current deduction amount. It uses the following expression:

```sql
CASE
    WHEN PRPayRunRegister.RecordType = 'Deduction'
    AND PRPayRunRegister.ImpactsNetPay = 'True'
    THEN PRPayRunRegister.Amount
    ELSE 0.00
END
```

**Curr Garnishments**

The **Curr Garnishments** field displays the current garnishments amount. It uses the following expression:

```sql
CASE
    WHEN PRPayRunRegister.RecordType = 'Garnishment'
    AND PRPayRunRegister.ImpactsNetPay = 'True'
    THEN PRPayRunRegister.Amount
    ELSE 0.00
END
```

**Curr Taxes**

The **Curr Taxes** field displays the current tax amount. It uses the following expression:

```sql
CASE
    WHEN PRPayRunRegister.RecordType = 'Tax'
    AND PRPayRunRegister.ImpactsNetPay = 'True'
    THEN PRPayRunRegister.Amount
    ELSE 0.00
END
```

**Curr Net**

The **Curr Net** field displays the current net amount. It uses the following expression:

```sql
CASE
    WHEN PRPayRunRegister.RecordType = 'Net'
    THEN PRPayRunRegister.Amount
    ELSE 0.00
END
```

**Filters**

The template contains the following filters:
Gross to Net MTD by Pay

The Gross to Net MTD by Pay report uses the Payroll Register by Pay Run topic to display MTD total gross to net amounts by employee.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MTD Gross</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>MTD Deductions</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>MTD Garnishments</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>MTD Taxes</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>MTD Net</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
</tbody>
</table>

Custom Fields

MTD Gross

The MTD Gross custom field displays the MTD total gross. It uses the following expression:

```
CASE WHEN PRPayRunRegister.RecordType = 'Earning' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN PRPayRunRegister.PayRunAmountMTD ELSE 0.00 END
```

MTD Deductions

The MTD Deductions custom field displays the MTD total deduction. It uses the following expression:
CASE WHEN PRPayRunRegister.RecordType = 'Deduction' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN PRPayRunRegister.PayRunAmountMTD ELSE 0.00 END

MTD Garnishments

The **MTD Garnishments** custom field displays the MTD total garnishments. It uses the following expression:

```
CASE WHEN PRPayRunRegister.RecordType = 'Garnishment' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN PRPayRunRegister.PayRunAmountMTD ELSE 0.00 END
```

MTD Taxes

The **MTD Taxes** custom field displays the MTD total tax. It uses the following expression:

```
CASE WHEN PRPayRunRegister.RecordType = 'Tax' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN PRPayRunRegister.PayRunAmountMTD ELSE 0.00 END
```

MTD Net

The **MTD Net** custom field displays the MTD total net. It uses the following expression:

```
CASE WHEN PRPayRunRegister.RecordType = 'Earning' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN PRPayRunRegister.PayRunAmountMTD ELSE CASE WHEN PRPayRunRegister.RecordType = 'Deduction' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN (PRPayRunRegister.PayRunAmountMTD * (-1)) ELSE CASE WHEN PRPayRunRegister.RecordType = 'Tax' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN (PRPayRunRegister.PayRunAmountMTD * (-1)) ELSE CASE WHEN PRPayRunRegister.RecordType = 'Garnishment' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN (PRPayRunRegister.PayRunAmountMTD * (-1)) ELSE 0.00 END END END END
```

Filters

The template contains the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th>Pay Group</th>
<th>Selected Period</th>
<th>Pay Run Id</th>
<th>Legal Entity Name</th>
<th>Employee Display Name</th>
<th>Record Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Select an Other</td>
<td>Select an Option...</td>
<td></td>
<td>Please select a value</td>
<td>Please select a value</td>
<td>Please select a value</td>
</tr>
</tbody>
</table>
**Gross to Net QTD by Pay**

The Gross to Net QTD by Pay report uses the Payroll Register by Pay Run topic to display quarter-to-date total gross to net amounts by employee.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>QTD Gross</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>QTD Deductions</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>QTD Garnishments</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>QTD Taxes</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>QTD Net</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
</tbody>
</table>

**Custom Fields**

**QTD Gross**

The **QTD Gross** custom field displays the QTD gross amount. It uses the following expression:

```
CASE WHEN PRPayRunRegister.RecordType = 'Earning' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN PRPayRunRegister.PayRunAmountQTD ELSE 0.00 END
```

**QTD Deductions**

The **QTD Deductions** custom field displays the QTD deduction amount. It uses the following expression:

```
CASE WHEN PRPayRunRegister.RecordType = 'Deduction' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN PRPayRunRegister.PayRunAmountQTD ELSE 0.00 END
```

**QTD Garnishments**

The **QTD Garnishments** custom field displays the QTD garnishment amount. It uses the following expression:

```
CASE WHEN PRPayRunRegister.RecordType = 'Garnishment' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN PRPayRunRegister.PayRunAmountQTD ELSE 0.00 END
```

**QTD Taxes**
The **QTD Taxes** custom field displays the QTD tax amount. It uses the following expression:

```
CASE WHEN PRPayRunRegister.RecordType = 'Tax' AND
      PRPayRunRegister.ImpactsNetPay = 'True' THEN
      PRPayRunRegister.PayRunAmountQTD ELSE 0.00 END
```

**QTD Net**

The **QTD Net** custom field displays the QTD net amount. It uses the following expression:

```
CASE WHEN PRPayRunRegister.RecordType = 'Earning' AND
      PRPayRunRegister.ImpactsNetPay = 'True' THEN
      PRPayRunRegister.PayRunAmountQTD ELSE CASE WHEN
      PRPayRunRegister.RecordType = 'Deduction' AND
      PRPayRunRegister.ImpactsNetPay = 'True' THEN
      (PRPayRunRegister.PayRunAmountQTD * (-1)) ELSE CASE WHEN
      PRPayRunRegister.RecordType = 'Tax' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN
      (PRPayRunRegister.PayRunAmountQTD * (-1)) ELSE CASE WHEN
      PRPayRunRegister.RecordType = 'Garnishment' AND
      PRPayRunRegister.ImpactsNetPay = 'True' THEN
      (PRPayRunRegister.PayRunAmountQTD * (-1)) ELSE 0.00 END END END END
```

**Filters**

The template contains the following filters:

```
Filters

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run Id</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity Name</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee Display Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Record Type</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

**Gross to Net YTD by Pay**

The Gross to Net YTD by Pay report uses the Payroll Register by Pay Run topic to display YTD total gross to net amounts by employee.

**Fields**

The template includes the following fields:

```
Field Name | Group by | Sort Order | Totals |
-----------|----------|------------|--------|
Pay Run Name | Yes      | A to Z     |        |
Legal Entity | Yes      | Ascending  |        |
Employee    |          |            |        |
```
**Custom Fields**

**YTD Gross**

The **YTD Gross** custom field displays the YTD gross amount. It uses the following expression:

```sql
CASE WHEN PRPayRunRegister.RecordType = 'Earning' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN PRPayRunRegister.PayRunAmountYTD ELSE 0.00 END
```

**YTD Deductions**

The **YTD Deductions** custom field displays the YTD deduction amount. It uses the following expression:

```sql
CASE WHEN PRPayRunRegister.RecordType = 'Deduction' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN PRPayRunRegister.PayRunAmountYTD ELSE 0.00 END
```

**YTD Garnishments**

The **YTD Garnishments** custom field displays the YTD gross amount. It uses the following expression:

```sql
CASE WHEN PRPayRunRegister.RecordType = 'Garnishment' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN PRPayRunRegister.PayRunAmountYTD ELSE 0.00 END
```

**YTD Taxes**

The **YTD Taxes** custom field displays the YTD taxes amount. It uses the following expression:

```sql
CASE WHEN PRPayRunRegister.RecordType = 'Tax' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN PRPayRunRegister.PayRunAmountYTD ELSE 0.00 END
```

**YTD Net**

The **YTD Net** custom field displays the YTD net amount. It uses the following expression:

```sql
CASE WHEN PRPayRunRegister.RecordType = 'Earning' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN PRPayRunRegister.PayRunAmountYTD ELSE CASE WHEN PRPayRunRegister.RecordType = 'Deduction' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN (PRPayRunRegister.PayRunAmountYTD * (-1)) ELSE CASE WHEN
```
PRPayRunRegister.RecordType = 'Tax' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN (PRPayRunRegister.PayRunAmountYTD * (-1)) ELSE CASE WHEN PRPayRunRegister.RecordType = 'Garnishment' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN (PRPayRunRegister.PayRunAmountYTD * (-1)) ELSE 0.00 END END END END

Filters

The template contains the following filters:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Record Category</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Record Code</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Current Deductions|         |            | Column Total: Sum
| MTD Deductions   |          |            | Column Total: Sum
| QTD Deductions   |          |            | Column Total: Sum
| YTD Deductions   |          |            | Column Total: Sum

To-Date Deductions by Pay

The To-Date Deductions by Pay report uses the Payroll Register by Pay Run topic to display current, month-to-date, quarter-to-date, and year-to-date deduction amounts. Administrators can use this report to view the detailed amounts of deductions (individual codes and custom subsets) for reconciling totals used to justify amounts sent to vendors and other third parties.

Fields

The template includes the following fields:
**Filters**

The template includes the following filters:

**To-Date Deductions by Range**

The To-Date Deductions by Range report uses the Payroll Register by Date Range topic to display employee totals for month, quarter, year, and date range for each deduction. The report contains a row for each selected deduction code with columns for date range, MTD, QTD, and YTD amounts.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Group</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Record Category</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Record Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Range Deductions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MTD Deductions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>QTD Deductions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>YTD Deductions</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:
The To-Date Earnings by Pay report uses the Payroll Register by Pay Run topic to display current, month-to-date, quarter-to-date, and year-to-date earning amounts. Administrators can use this report to view the detailed hours and earnings (individual codes and custom sub-sets) for reconciling total labor expenses on the primary org unit.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
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</tr>
<tr>
<td>Record Category</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Record Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Earnings</td>
<td></td>
<td>Column Total: Sum</td>
<td></td>
</tr>
<tr>
<td>MTD Earnings</td>
<td></td>
<td>Column Total: Sum</td>
<td></td>
</tr>
<tr>
<td>QTD Earnings</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>YTD Earnings</td>
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<td>Column Total: Sum</td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
To-Date Earnings by Range

The To-Date Earnings by Range report uses the Payroll Register by Date Range topic to display a row for each selected earnings code, grouped by employee, with columns for date range, MTD, QTD, and YTD amounts.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Group</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
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</tr>
<tr>
<td>Employee</td>
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<td>A to Z</td>
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</tr>
<tr>
<td>Record Code</td>
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<td>Date Range Earnings</td>
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<td>Column: Sum</td>
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<td>MTD Earnings</td>
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<tr>
<td>QTD Earnings</td>
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</tr>
<tr>
<td>YTD Earnings</td>
<td></td>
<td>Column: Sum</td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
To-Date Garnishments by Pay

The To-Date Garnishments by Pay report uses the Payroll Register by Pay Run topic to display current, month-to-date, quarter-to-date, and year-to-date garnishment amounts. Administrators can use this report to view the detailed amounts of garnishments (individual codes and custom subsets) for reconciling totals used to justify amounts sent to courts and other third parties.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Record Category</td>
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<td></td>
<td></td>
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<tr>
<td>Record Code</td>
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<tr>
<td>Current Garnishments</td>
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</tr>
<tr>
<td>MTD Garnishments</td>
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<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>QTD Garnishments</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>YTD Garnishments</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
</tbody>
</table>
The template includes the following filters:

**Filters**

P R Pay Run Id

Legal Entity Name

Employee Display Name

Record Type

And Record Category Contains

**To-Date Garnishments by Range**

The To-Date Garnishments by Range report uses the Payroll Register by Date Range topic to display a row for each selected garnishment code grouped by employee, with columns for data range, MTD, QTD, and YTD amounts. Administrators can use this report to view totals for month, quarter, year, and date range for each garnishment.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Group</td>
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<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
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<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Record Category</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Record Code</td>
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<td></td>
</tr>
<tr>
<td>Date Range Garnishments</td>
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<td>Column: Sum</td>
<td></td>
</tr>
<tr>
<td>MTD Garnishments</td>
<td></td>
<td>Column: Sum</td>
<td></td>
</tr>
<tr>
<td>QTD Garnishments</td>
<td></td>
<td>Column: Sum</td>
<td></td>
</tr>
<tr>
<td>YTD Garnishments</td>
<td></td>
<td>Column: Sum</td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:
To-Date Gross to Net by Pay

The To-Date Gross to Net by Pay report uses the Payroll Register by Pay Run topic to display current, month-to-date, quarter-to-date, and year-to-date gross to net amounts.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run Name</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Legal Entity Name</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Record Order</td>
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</tr>
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<td>MTD Amount</td>
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<td>Column Total: Sum</td>
</tr>
<tr>
<td>QTD Amount</td>
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<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>YTD Amount</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
To-Date Gross to Net Summary by Pay

The To-Date Gross to Net Summary by Pay report uses the Payroll Register by Pay Run topic to display a row for each total: earnings, deductions, garnishments, taxes and net, with the records grouped by employee. It includes columns for current, MTD, QTD and YTD. Administrators can use this report to view employee gross-to-net totals with a selected to-date.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
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</tr>
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<td>Employee</td>
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<tr>
<td>MTD Amount</td>
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<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>QTD Amount</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>YTD Amount</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>Record Order</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
To-Date Gross to Net Summary by Range

The To-Date Gross to Net Summary by Range report uses the Payroll Register by Date Range topic to display a row for each total: earnings, deductions, garnishments, taxes, and net, with records grouped by employee. The report contains columns for date range, MTD, QTD, and YTD amounts. Administrators can use this report to review employee totals for month, quarter, year, and date range, for each record type.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Group</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
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</tr>
<tr>
<td>Employee Display</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Record Type</td>
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<td></td>
</tr>
<tr>
<td>Date Range Amount</td>
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<td>Column: Sum</td>
</tr>
<tr>
<td>MTD Amount</td>
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<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>QTD Amount</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>YTD Amount</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>Record Order</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:
To-Date Net Pay by Pay

The To-Date Net Pay by Pay report uses the Payroll Register by Pay Run topic to display current, month-to-date, quarter-to-date, and year-to-date net pay amounts. Administrators can use this report to view the detailed amounts of net pay (individual codes and custom sub-sets) for reconciling totals to bank statements.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
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<td>Ascending</td>
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<td>Column Total: Sum</td>
</tr>
<tr>
<td>QTD Net Pay</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
<tr>
<td>YTD Net Pay</td>
<td></td>
<td></td>
<td>Column Total: Sum</td>
</tr>
</tbody>
</table>

Custom Fields

Current Net Pay

The Current Net Pay custom field displays the current net pay amount. It uses the following expression:
CASE WHEN PRPayRunRegister.RecordType = 'Earning' AND 
PRPayRunRegister.ImpactsNetPay = 'True' THEN PRPayRunRegister.Amount ELSE 
CASE WHEN PRPayRunRegister.RecordType = 'Deduction' AND 
PRPayRunRegister.ImpactsNetPay = 'True' THEN (PRPayRunRegister.Amount * (-1)) ELSE CASE WHEN PRPayRunRegister.RecordType = 'Tax' AND 
PRPayRunRegister.ImpactsNetPay = 'True' THEN (PRPayRunRegister.Amount * (-1)) ELSE CASE WHEN PRPayRunRegister.RecordType = 'Garnishment' AND 
PRPayRunRegister.ImpactsNetPay = 'True' THEN (PRPayRunRegister.Amount * (-1)) ELSE 0.00 END END END END

**MTD Net Pay**

The **MTD Net Pay** custom field displays the MTD net pay amount. It uses the following expression:

CASE WHEN PRPayRunRegister.RecordType = 'Earning' AND 
PRPayRunRegister.ImpactsNetPay = 'True' THEN 
PRPayRunRegister.PayRunAmountMTD ELSE CASE WHEN 
PRPayRunRegister.RecordType = 'Deduction' AND 
PRPayRunRegister.ImpactsNetPay = 'True' THEN 
(PRPayRunRegister.PayRunAmountMTD * (-1)) ELSE CASE WHEN 
PRPayRunRegister.RecordType = 'Tax' AND PRPayRunRegister.ImpactsNetPay = 
'True' THEN (PRPayRunRegister.PayRunAmountMTD * (-1)) ELSE CASE WHEN 
PRPayRunRegister.RecordType = 'Garnishment' AND 
PRPayRunRegister.ImpactsNetPay = 'True' THEN 
(PRPayRunRegister.PayRunAmountMTD * (-1)) ELSE 0.00 END END END END

**QTD Net Pay**

The **QTD Net Pay** custom field displays the QTD net pay amount. It uses the following expression:

CASE WHEN PRPayRunRegister.RecordType = 'Earning' AND 
PRPayRunRegister.ImpactsNetPay = 'True' THEN 
PRPayRunRegister.PayRunAmountQTD ELSE CASE WHEN 
PRPayRunRegister.RecordType = 'Deduction' AND 
PRPayRunRegister.ImpactsNetPay = 'True' THEN 
(PRPayRunRegister.PayRunAmountQTD * (-1)) ELSE CASE WHEN 
PRPayRunRegister.RecordType = 'Tax' AND PRPayRunRegister.ImpactsNetPay = 
'True' THEN (PRPayRunRegister.PayRunAmountQTD * (-1)) ELSE CASE WHEN 
PRPayRunRegister.RecordType = 'Garnishment' AND 
PRPayRunRegister.ImpactsNetPay = 'True' THEN 
(PRPayRunRegister.PayRunAmountQTD * (-1)) ELSE 0.00 END END END END

**YTD Net Pay**

The **YTD Net Pay** custom field displays the YTD net pay amount. It uses the following expression:

CASE WHEN PRPayRunRegister.RecordType = 'Earning' AND 
PRPayRunRegister.ImpactsNetPay = 'True' THEN 
PRPayRunRegister.PayRunAmountYTD ELSE CASE WHEN 
PRPayRunRegister.RecordType = 'Deduction' AND 
PRPayRunRegister.ImpactsNetPay = 'True' THEN 
(PRPayRunRegister.PayRunAmountYTD * (-1)) ELSE CASE WHEN 
PRPayRunRegister.RecordType = 'Tax' AND PRPayRunRegister.ImpactsNetPay = 
'True' THEN (PRPayRunRegister.PayRunAmountYTD * (-1)) ELSE CASE WHEN 
PRPayRunRegister.RecordType = 'Garnishment' AND 
PRPayRunRegister.ImpactsNetPay = 'True' THEN 
(PRPayRunRegister.PayRunAmountYTD * (-1)) ELSE 0.00 END END END END
'True' THEN (PRPayRunRegister.PayRunAmountYTD * (-1)) ELSE CASE WHEN PRPayRunRegister.RecordType = 'Garnishment' AND PRPayRunRegister.ImpactsNetPay = 'True' THEN (PRPayRunRegister.PayRunAmountYTD * (-1)) ELSE 0.00 END END END

**Filters**

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th>P R Pay Run Id</th>
<th>Pay Group</th>
<th>Selected Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal Entity Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee Display Name</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Record Type</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
</tbody>
</table>

**To-Date Taxes by Pay**

The To-Date Taxes by Pay report uses the Payroll Register by Pay Run topic to display current, month-to-date, quarter-to-date, and year-to-date tax amounts. Administrators can use this report to view the detailed amounts of taxes (individual codes and custom sub-sets) for reconciling totals used to justify amounts remitted to agencies.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Record Category</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Record Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Taxes</td>
<td></td>
<td>Column Total: Sum</td>
<td></td>
</tr>
<tr>
<td>MTD Taxes</td>
<td></td>
<td>Column Total: Sum</td>
<td></td>
</tr>
<tr>
<td>QTD Taxes</td>
<td></td>
<td>Column Total: Sum</td>
<td></td>
</tr>
<tr>
<td>YTD Taxes</td>
<td></td>
<td>Column Total: Sum</td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:
To-Date Taxes by Range

The To-Date Taxes by Range report uses the Payroll Register by Date Range topic to display a row for each selected tax code for each employee, with columns for data range, MTD, QTD, and YTD amounts. Administrators can use this report to view totals for month, quarter, year, and date range for each tax.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Group</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Payer and Code</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Range Taxes</td>
<td></td>
<td>Column: Sum</td>
<td></td>
</tr>
<tr>
<td>MTD Taxes</td>
<td></td>
<td>Column: Sum</td>
<td></td>
</tr>
<tr>
<td>QTD Taxes</td>
<td></td>
<td>Column: Sum</td>
<td></td>
</tr>
<tr>
<td>YTD Taxes</td>
<td></td>
<td>Column: Sum</td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Payer and Code

The Payer and Code custom field displays the record code by source. It uses the following expression:

```
CASE WHEN PRPayRunRegisterPeriod.ImpactsNetPay = 1 THEN 'EE - ' + 
PRPayRunRegisterPeriod.RecordCode WHEN 
PRPayRunRegisterPeriod.ImpactsNetPay = 0 THEN 'ER - ' +
```
Filters

The template includes the following filters:

To-Date Vendor Payments by Pay

The To-Date Vendor Payments by Pay report uses the Payroll Register by Pay Run topic to display details about third-party vendor payments, including current, MTD, QTD, and YTD amounts, vendor name, and disbursement method. You can use this report to view employees’ current, month, quarter, and annual earnings and deductions for reconciling payments to vendors.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Period</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Current Vendor Paid</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Record Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cur Amount</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>MTD Amount</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
</tbody>
</table>
The template includes the following filters:

**Filters**

The template includes the following fields:

**YTD Wage Analysis by Pay**

The YTD Wage Analysis by Pay report is based on the Payroll Register by Pay Run topic. This report allows you to compare wage-impacting earnings and deductions against agency wages. You can use the report to review limited YTD wages and the resulting YTD tax accumulation.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Group</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>YTD Amount</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
<tr>
<td>YTD Total Wages</td>
<td></td>
<td></td>
<td>Column: Sum</td>
</tr>
</tbody>
</table>
YTD Limited Wages  |  Column: Sum
YTD Tax  |  Column: Sum

Custom Fields

Type

The **Type** custom field displays the record type. It uses the following expression:

```sql
CASE WHEN PRPayRunRegister.RecordType = 'Earning' THEN CONCAT(' ', PRPayRunRegister.RecordType) WHEN PRPayRunRegister.IsWCBDeduction = 1 THEN 'WCB' ELSE PRPayRunRegister.RecordType END
```

YTD Amount

The **YTD Amount** custom field displays the year-to-date amount for the employee. It uses the following expression:

```sql
CASE WHEN PRPayRunRegister.RecordType = 'Earning' THEN PRPayRunRegister.PayRunAmountYTD WHEN PRPayRunRegister.IsWCBDeduction = 1 THEN 0.00 WHEN PRPayRunRegister.RecordType = 'Deduction' THEN -1 * PRPayRunRegister.PayRunAmountYTD ELSE 0.00 END
```

YTD Tax

The **YTD Tax** custom field displays the year-to-date amount of tax for the employee. It uses the following expression:

```sql
CASE WHEN PRPayRunRegister.RecordType = 'Tax' THEN PRPayRunRegister.PayRunAmountYTD WHEN PRPayRunRegister.IsWCBDeduction = 1 THEN PRPayRunRegister.PayRunAmountYTD ELSE 0.00 END
```

Filters

The template includes the following filters:
The Payroll > Third Party Payments category contains reports that display information about third party payments from the payroll features.

**Arrestment Payments Full Details**

**Before You Begin:** This report is for customers who use the UK Payroll feature.

The Arrestment Payments Full Details report uses the Pay Run - UK Arrestment Payments topic to display full details of arrestment payments for a particular pay group and pay run.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer Name</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employer Tax Reference</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payee Name</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>Value</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employer Reference Number</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payment From</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payment To</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee First Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Surname</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Initials</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NI Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arrestment Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reference Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Issuing Body</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Monthly Amount Due</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual Deduction</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reason for Difference</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Died</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Received Adoption Pay</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Received Maternity Pay</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Received Paternity Pay</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Received Sick Pay</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Arrears Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arrears Paid Back Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Deducted MTD</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Deducted QTD</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Deducted YTD</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Amount Deducted</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Amount in Arrears</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Debt</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Amount Paid</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Total Amount Paid**

The **Total Amount Paid** custom field displays the total amount that was paid. It uses the following expression:
Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th>Pay Run</th>
<th>* Pay Group</th>
<th>Select an Option...</th>
<th>* True</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Use Committed Data Only</td>
<td>*</td>
<td>Selected Period</td>
<td>Select an Option...</td>
</tr>
<tr>
<td>And Payee Name</td>
<td>Equal</td>
<td>Please select a value</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Arrestment Type</td>
<td>Equal</td>
<td>Please select a value</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Issuing Body</td>
<td>Equal</td>
<td>Please select a value</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Employee Name</td>
<td>Contains</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Employee Number</td>
<td>Contains</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Reason For Difference</td>
<td>Equal</td>
<td>Please select a value</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Arrestment Payments Summary

**Before You Begin:** This report is for customers who use the **UK Payroll** feature.

The Arrestment Payments Summary report uses the Pay Run - UK Arrestment Payments topic to display a summary of arrestment payments for a particular pay group and pay run.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer Name</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payee Name</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payment From</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payment To</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee First Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Surname</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Initials</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NI Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arrestment Type</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Reference Number

Monthly Amount Due

Actual Deduction

Reason for Difference

Total Amount Paid

**Custom Fields**

**Total Amount Paid**

The **Total Amount Paid** custom field displays the total amount that was paid. It uses the following expression:

\[
\text{SUM(TakenAmountCurrent)}
\]

**Filters**

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Run</td>
<td>* Pay Group</td>
<td>Selected Period</td>
<td>Selected Period</td>
</tr>
<tr>
<td>Use Committed Data Only</td>
<td>* True</td>
<td>Selected Period</td>
<td>Selected Period</td>
</tr>
<tr>
<td>And Payee Name</td>
<td>Equal</td>
<td>Please select a value</td>
<td></td>
</tr>
<tr>
<td>And Arrestment Type</td>
<td>Equal</td>
<td>Please select a value</td>
<td></td>
</tr>
<tr>
<td>And Issuing Body</td>
<td>Equal</td>
<td>Please select a value</td>
<td></td>
</tr>
<tr>
<td>And Employee Name</td>
<td>Contains</td>
<td>Please select a value</td>
<td></td>
</tr>
<tr>
<td>And Employee Number</td>
<td>Contains</td>
<td>Please select a value</td>
<td></td>
</tr>
<tr>
<td>And Reason For Difference</td>
<td>Equal</td>
<td>Please select a value</td>
<td></td>
</tr>
</tbody>
</table>

**Garnishment Summary**

The Garnishment Summary report uses the Pay Run - Third Party Payments topic to display a list of all garnishments in the current period.

**Fields**

The template includes the following fields:
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal Entity Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Funding ID</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payee Name</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Last, First</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SIN/SSN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Garnishment Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Case Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taken Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TakenAmountSum</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:

![Filter Diagram]

**Third Party Payments**

The Third Party Payments audit report uses the Pay Run - Third Party Payments topic to display a list of the third party payments from a pay run.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal Entity Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Funding ID</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payee Name</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Last, First</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transaction Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Calculated Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Calculated Amount YTD</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taken Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taken Amount YTD</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payee Count</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earning/Deduction Count</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Count</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taken Amount Total</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taken Amount YTD Total</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Calculated Amount Total</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Calculated Amount YTD Total</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disbursed to Payee</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:

![Filters Diagram]

**Performance Reports**

The **Performance** category contains reports that display data from the **Performance** feature. Managers and administrators can use these reports to view information about employee goals, competencies, conversations, and reviews.

**Competencies**

The **Performance > Competencies** category contains reports that display information from the **Competencies** tab in **Performance**. Managers and administrators can use these reports to view information about employees and their competencies.
Competencies by Employees

The Competencies by Employees report uses the Performance Competencies topic to display a list of all competencies assigned to you and to the employees that you can access. It includes recent performance ratings on the competencies, with the records grouped by employee.

Fields

The template contains the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Competency Name</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Global Rating Name</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Competency Category</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assignment Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Rating Value</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Rating Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Global Rating Value</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Review Rating Value

The Review Rating Value field displays a numeric rating for the competency from the latest review. It uses the following expression:

```
cast(CONVERT(Decimal(10,2),
    vEmployeeReviewCompetencyReport.FinalReviewRating) as varchar) + ' / ' +
cast(CONVERT(Decimal(10,2),
    vEmployeeReviewCompetencyReport.ReviewMaxRatingValue) as varchar)
```

Global Rating Value

The Global Rating Value field displays a numeric rating for the competency from the latest review on the global rating scale. It uses the following expression:

```
cast(CONVERT(Decimal(10,2),
    vEmployeeReviewCompetencyReport.GlobalFinalRatingValue) as varchar) + ' / '
' + cast(CONVERT(Decimal(10,2),
    vEmployeeReviewCompetencyReport.MaxRatingValue) as varchar)
```
Filters

The template includes the following filters:

Filters

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competency Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Global Rating Name</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Rating Value</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Rating Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Global Rating Value</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Employee by Competencies

The Employee by Competencies report uses the Performance Competencies topic to display a list of all competencies assigned to you and the employees that you can access. It includes the most recent performance rating for each competency, with the records grouped by competency.

Fields

The template includes the following fields:
Custom Fields

Review Rating Value

The **Review Rating Value** field displays a numeric rating for the competency from the latest review. It uses the following expression:

```sql
cast(CONVERT(Decimal(10,2), vEmployeeReviewCompetencyReport.FinalReviewRating) as varchar) + ' / ' + cast(CONVERT(Decimal(10,2), vEmployeeReviewCompetencyReport.ReviewMaxRatingValue) as varchar)
```

Global Rating Value

The **Global Rating Value** field displays a numeric rating for the competency from the latest review on the global rating scale. It uses the following expression:

```sql
cast(CONVERT(Decimal(10,2), vEmployeeReviewCompetencyReport.GlobalFinalRatingValue) as varchar) + ' / ' + cast(CONVERT(Decimal(10,2), vEmployeeReviewCompetencyReport.MaxRatingValue) as varchar)
```

Filters

The template includes the following filters:

**Filters**

| Start Date | * 2/8/2017 |
| End Date   |            |

- And | Employee Review Competency Start Date | Less Than Equal | @EffectiveEnd
- And | Employee Review Competency End Date   | Greater Than Equal | @EffectiveStart
- And | Manager Effective Start                | Less Than Equal | 2/8/2017
- And | Manager Effective End                  | Greater Than Equal | 2/8/2017
- Or  | Manager Effective Start                | Empty           |
- And | Work Assignment Effective Start        | Less Than Equal | 2/8/2017
- And | Work Assignment Effective End          | Greater Than Equal | 2/8/2017

Conversations

The **Performance > Conversations** category contains reports that display information from the **Conversations** tab in **Performance**. Managers and administrators can use these reports to view information about employees and their performance conversations.
Employee Conversations Summary

The Employee Conversations Summary report uses the Performance Conversations topic top display a list of users who have authored one or more conversations within a selected date range. The report includes information such as the number of conversations and the date of the most recent one.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Conversations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Conv. Date</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Total Conversations

The **Total Conversations** custom field displays the total number of conversations for that employee that have been authored within the specified date range. It uses the following expression:

```
sum(case when vConversationReport.CreatedDate is not null then 1 else 0 end)
```

Last Conv. Date

The **Last Conv. Date** custom field displays the date that the most recent conversation was authored for that employee. It uses the following expression:

```
Max(cast((vConversationReport.CreatedDateTime) as datetime))
```

Filters

The template includes the following filters:
Employees with Low Conversations

The Employees with Low Conversations report uses the Performance Conversations topic to display a list of employees who have fewer than a specified number of conversations. It includes information such as the number of conversations that the employee has made and the date of the most recent one. You can use this report to view which users are using conversations and how frequently they are using them.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Conversations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Conv. Date</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Total Conversations

The Total Conversations custom field displays the total number of conversations for that employee that have been authored within the specified date range. It uses the following expression:

\[
\text{sum(case when vConversationReport.CreatedDate is not null then 1 else 0 end)}
\]

Last Conv. Date
The **Last Conv. Date** custom field displays the date that the most recent conversation was authored for that employee. It uses the following expression:

```
Max(cast((vConversationReport.CreatedDateTime) as datetime))
```

**Filters**

The template includes the following filters:

```
<table>
<thead>
<tr>
<th>Conversations From</th>
<th>* 1/1/2000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversations To</td>
<td></td>
</tr>
</tbody>
</table>

And Total Conversations Less Than * 1
And Primary Work Assignment Equal True
And Employment Status Group Name Not In Terminated
```

**Goals**

The **Performance > Goals** category contains reports that display information from the **Goals** tab in **Performance**. Managers and administrators can use these reports to view information about employees and the status of their goals.

**Employee by Goals**

The Employee by Goals report is based on the Performance Goals Topic. This template allows users to report on which goals are assigned to each employee. For example, a user could run this report to determine which goals are assigned to one of their employees. Employees with terminated status are excluded from this report.

**Fields**

The template includes the following columns:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Org Goal</td>
<td></td>
<td>Z to A</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Due Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Custom Fields**

**Organizational Goal**

The **Organizational Goal** custom field indicates if the goal is an organizational goal. It uses the following expression:

```
CASE WHEN vGoalsReport.GoalType = 0 THEN 'Yes' WHEN vGoalsReport.GoalType = 2 THEN 'No' ELSE '' END
```

**Goal Status**

The **Goal Status** custom field displays the status of the goal (e.g., not started, on track, completed). It uses the following expression:

```
CASE WHEN PerformanceGoalProgressStatusCustom.GoalProgressStatus = 'NotStarted' THEN 'Not Started' WHEN PerformanceGoalProgressStatusCustom.GoalProgressStatus = 'OnTrack' THEN 'On Track ' WHEN PerformanceGoalProgressStatusCustom.GoalProgressStatus = 'AtRisk' THEN 'At Risk' ELSE PerformanceGoalProgressStatusCustom.GoalProgressStatus END
```

**Filters**

The template includes the following filters:

- **Start Date**
- **End Date**

<table>
<thead>
<tr>
<th>Or</th>
<th>And</th>
<th>And</th>
<th>And</th>
<th>And</th>
<th>And</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>Due Date</td>
<td>Primary Work Assignment</td>
<td>Employment Status Group Name</td>
<td>Goal</td>
<td>Deactivate date</td>
</tr>
<tr>
<td>Less Than Equal</td>
<td>Greater Than Equal</td>
<td>Equal</td>
<td>Not In</td>
<td>Not Empty</td>
<td>Empty</td>
</tr>
</tbody>
</table>

* 1/23/2017
Employee by Goals Completed After the Due Date

The Employee by Goals Completed After the Due Date report uses the Performance Goals topic to display a list of goals that were completed after their due date. The report includes information such as employee, manager, goal, category, due date, and completion date.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Org Goal</td>
<td></td>
<td>Z to A</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Goal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Due Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Completion Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PCT Completed</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Org Goal

The Org Goal custom field displays whether the goal is an organizational goal. It uses the following expression:

```
CASE WHEN vGoalsReport.GoalType = 0 THEN 'Yes' WHEN vGoalsReport.GoalType = 2 THEN 'No' ELSE '' END
```

Status

The Status custom field displays the status of the goal, for example Not Started, On Track, or Completed. It uses the following expression:

```
CASE WHEN PerformanceGoalProgressStatusCustom.GoalProgressStatus = 'NotStarted' THEN 'Not Started' WHEN PerformanceGoalProgressStatusCustom.GoalProgressStatus = 'OnTrack' THEN 'On Track' WHEN PerformanceGoalProgressStatusCustom.GoalProgressStatus = 'AtRisk' THEN 'At Risk' ELSE PerformanceGoalProgressStatusCustom.GoalProgressStatus END
```
Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal Category</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Goal</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Org Goal</td>
<td></td>
<td>Z to A</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Due Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PCT Completed</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Custom Fields

Org Goal

The Org Goal custom field displays whether the goal is an organizational goal. It uses the following expression:

```sql
CASE WHEN vGoalsReport.GoalType = 0 THEN 'Yes' WHEN vGoalsReport.GoalType = 2 THEN 'No' ELSE '' END
```

Status

The Status custom field displays the status of the goal, for example Not Started, On Track, or Completed. It uses the following expression:

```sql
CASE WHEN PerformanceGoalProgressStatusCustom.GoalProgressStatus = 'NotStarted' THEN 'Not Started' WHEN PerformanceGoalProgressStatusCustom.GoalProgressStatus = 'OnTrack' THEN 'On Track' WHEN PerformanceGoalProgressStatusCustom.GoalProgressStatus = 'AtRisk' THEN 'At Risk' ELSE PerformanceGoalProgressStatusCustom.GoalProgressStatus END
```

Filters

The template includes the following filters:

Filters

<table>
<thead>
<tr>
<th>Start Date</th>
<th>*</th>
<th>@EffectiveEnd</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Date</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>And Start Date</th>
<th>Less Than Equal</th>
<th>@EffectiveEnd</th>
</tr>
</thead>
<tbody>
<tr>
<td>Or Start Date</td>
<td>Empty</td>
<td></td>
</tr>
<tr>
<td>And Due Date</td>
<td>Greater Than Equal</td>
<td>@EffectiveStart</td>
</tr>
<tr>
<td>And Primary Work Assignment</td>
<td>Equal</td>
<td>True</td>
</tr>
<tr>
<td>And Employment Status Group Name</td>
<td>Not In</td>
<td>Terminated</td>
</tr>
<tr>
<td>And Deactivate date</td>
<td>Empty</td>
<td></td>
</tr>
<tr>
<td>And Goal Category</td>
<td>Not Empty</td>
<td></td>
</tr>
<tr>
<td>And Goal Category</td>
<td>In</td>
<td>Please select a value</td>
</tr>
</tbody>
</table>
Employees with Goals at Risk or Overdue

The Employees with Goals at Risk or Overdue report uses the Performance Goals topic to display a list of employee goals that have the status "At Risk" or "Overdue." It contains information such as employee name and number, manager, goal category, due date, and completion percent.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Goal</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Due Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PCT Completed</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Status

The **Status** custom field displays the status of the goal (e.g., not started, on track, and completed). It uses the following expression:

```
CASE WHEN PerformanceGoalProgressStatusCustom.GoalProgressStatus = 'NotStarted' THEN 'Not Started'
WHEN PerformanceGoalProgressStatusCustom.GoalProgressStatus = 'OnTrack'
THEN 'On Track '
WHEN PerformanceGoalProgressStatusCustom.GoalProgressStatus = 'AtRisk'
THEN 'At Risk'
ELSE PerformanceGoalProgressStatusCustom.GoalProgressStatus END
```

% Completed

The **% Completed** custom field displays the completion percent. It uses the following expression:

```
CASE WHEN vGoalsReport.ProgressionType = 2 THEN 0.0 ELSE vGoalsReport.CompletionPercent END
```

Filters

The template includes the following filters:
Employees with Incomplete Goals

The Employees with Incomplete Goals report uses the Performance Goals topic to display a list of employees who have at least one goal that is not completed. It contains information such as employee and manager name, goal category, status, due date, and completion percent.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Goal</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Due Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>PCT Completed</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Custom Fields**

**Status**

The **Status** custom field displays the status of the goal (e.g., not started, on track, and completed). It uses the following expression:

```
CASE WHEN PerformanceGoalProgressStatusCustom.GoalProgressStatus = 'NotStarted' THEN 'Not Started'
WHEN PerformanceGoalProgressStatusCustom.GoalProgressStatus = 'OnTrack'
THEN 'On Track '
WHEN PerformanceGoalProgressStatusCustom.GoalProgressStatus = 'AtRisk'
THEN 'At Risk'
ELSE PerformanceGoalProgressStatusCustom.GoalProgressStatus END
```

**% Completed**

The **% Completed** custom field displays the completion percent. It uses the following expression:

```
CASE WHEN vGoalsReport.ProgressionType = 2 THEN 0.0 ELSE vGoalsReport.CompletionPercent END
```

**Filters**

The template includes the following filters:

- **Start Date**: 1/27/2017
- **End Date**: Not selected

- **And** Performance Goals View Goal Start Date Less Than Equal **@EffectiveEnd**
- **Or** Performance Goals View Goal Start Date Empty

- **And** Due Date Greater Than Equal **@EffectiveStart**
  - **And** Primary Work Assignment Equal True
  - **And** Employment Status Group Name Not In Terminated
  - **And** Deactivate date Empty
  - **And** Status Not Equal Completed
  - **And** Goal In Please select a value
  - **And** Employee Display Name In Please select a value
Employees with Less than Minimum Goals

The Employees with Less than Minimum Goals report uses the Performance Goals topic to display a list of employees who do not have a minimum number of goals assigned to them. It includes information such as employee name, position, location, and the number of goals assigned. The data is grouped by manager. By default, the report lists employees who have less than or equal to three goals assigned; you can adjust this number in the filter values.

Note: Employees are only included in the list if they have one or more goal assigned to them; employees with no goals assigned are not listed.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Goals Assigned</td>
<td></td>
<td>Smallest to Largest</td>
<td>Column Total: Count</td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:

Filters

<table>
<thead>
<tr>
<th>Filter</th>
<th>Condition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Performance Goals View Goal Start Date</td>
<td>Less Than Equal</td>
<td>@EffectiveEnd</td>
</tr>
<tr>
<td>Or Performance Goals View Goal Start Date</td>
<td>Empty</td>
<td></td>
</tr>
<tr>
<td>And Performance Goals View Goal End Date</td>
<td>Greater Than Equal</td>
<td>@EffectiveStart</td>
</tr>
<tr>
<td>And Primary Work Assignment</td>
<td>Equal</td>
<td>True</td>
</tr>
<tr>
<td>And Employment Status Group Name</td>
<td>Not In</td>
<td>Terminated</td>
</tr>
<tr>
<td>And Deactivate date</td>
<td>Empty</td>
<td></td>
</tr>
<tr>
<td>And Goals Assigned (Count)</td>
<td>Less Than Equal</td>
<td>3</td>
</tr>
</tbody>
</table>
Goals By Employees

The Goals by Employees report is based on the Performance Goals Topic. This template allows users to report on which employees are assigned to each goal. For example, a user could run this report to determine which employees are assigned to each goal. Employees with terminated status are excluded from this report.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Goal</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Due Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Org Goal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PCT Completed</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Organizational Goal

The Organizational Goal custom field indicates if the goal is an organizational goal. It uses the following expression:

```
CASE WHEN vGoalsReport.GoalType = 0 THEN 'Yes' WHEN vGoalsReport.GoalType = 2 THEN 'No' ELSE '' END
```

Goal Status

The Goal Status custom field displays the status of the goal (e.g., not started, on track, completed). It uses the following expression:

```
CASE WHEN PerformanceGoalProgressStatusCustom.GoalProgressStatus = 'NotStarted' THEN 'Not Started'
WHEN PerformanceGoalProgressStatusCustom.GoalProgressStatus = 'OnTrack' THEN 'On Track'
WHEN PerformanceGoalProgressStatusCustom.GoalProgressStatus = 'AtRisk' THEN 'At Risk'
```

```
Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Cycle</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Review Period</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td>A to Z</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager Email</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Custom Fields

Review Period

The Review Period custom field displays the review period. It uses the following expression:

```sql
CASE WHEN vEmployeeReviewCycleReport.ReviewCycleStartDate is null THEN ''
END
```

Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th>Performance Cycle Start</th>
<th>Performance Cycle End</th>
</tr>
</thead>
</table>

And | Review Cycle | In | * | Please select a value |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>And</td>
<td>Employee Review Cycle View ...</td>
<td>Greater Than Equal</td>
<td>@PFReviewStatusCustomEffectiveStart</td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Employee Review Cycle View ...</td>
<td>Less Than Equal</td>
<td>@PFReviewStatusCustomEffectiveEnd</td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Primary Work Assignment</td>
<td>Equal</td>
<td>True</td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Work Assignment Effective Start</td>
<td>Less Than Equal</td>
<td>1/27/2017</td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Work Assignment Effective End</td>
<td>Greater Than Equal</td>
<td>1/27/2017</td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Employee Employment Status Effi.</td>
<td>Empty</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Employee Review Cycle View Emp...</td>
<td>Equal</td>
<td>False</td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Employee Review Cycle View Man...</td>
<td>Equal</td>
<td>False</td>
<td></td>
</tr>
</tbody>
</table>

Employee Review Not Started by Location

The Employee Review Not Started by Location report is a variation of the Employee Review Not Started template. It uses the Performance Review topic to return the list of employees who have not started the review, grouped by location.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Cycle</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Location</th>
<th>Yes</th>
<th>Ascending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Manager Email</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Review Period</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Review Period**

The **Review Period** custom field displays the review period. It uses the following expression:

```sql
CASE WHEN vEmployeeReviewCycleReport.ReviewCycleStartDate is null THEN ''
END
```

**Filters**

The template includes the following filters:

**Filters**

<table>
<thead>
<tr>
<th>Performance Cycle Start</th>
<th>1/27/2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance Cycle End</td>
<td></td>
</tr>
</tbody>
</table>

And Review Cycle In * 0 Selected

- And Employee Review Cycle View Review... Greater Than Equal: @PReviewStatusCustomEffectiveStart
- And Employee Review Cycle View Review... Less Than Equal: @PReviewStatusCustomEffectiveEnd
- And Work Assignment Effective Start Less Than Equal: 1/27/2017
- And Work Assignment Effective End Greater Than Equal: 1/27/2017
- And Employee Employment Status Effect Empty
- And Primary Work Assignment Equal True
- And Employee Review Cycle View Employee... Equal False
- And Employee Review Cycle View Manager... Equal False
Employee Review Not Started by Manager

The Employee Review Not Started by Manager report is a variation of the Employee Review Not Started template. It uses the Performance Review topic to return the list of employees who have not started the review, grouped by manager.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Cycle</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Manager Email</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Review Period</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Review Period**

The *Review Period* custom field displays the review period. It uses the following expression:

```sql
CASE WHEN vEmployeeReviewCycleReport.ReviewCycleStartDate is null THEN ''
ELSE Convert(nvarchar(10), vEmployeeReviewCycleReport.ReviewCycleStartDate, 101) + ' - ' +
Convert(nvarchar(10), vEmployeeReviewCycleReport.ReviewCycleEndDate, 101)
END
```

**Filters**

The template includes the following filters:
**Employee Review Not Started by Position**

The Employee Review Not Started by Position report is a variation of the Employee Review Not Started template. This variation uses the Performance Review topic to return the list of employees who have not started the review, with the records grouped by position.

### Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Period</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Manager Email</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Review Cycle</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Review Period**
The **Review Period** custom field displays the review period. It uses the following expression:

```
CASE WHEN vEmployeeReviewCycleReport.ReviewCycleStartDate is null THEN ''
ELSE
  Convert(nvarchar(10), vEmployeeReviewCycleReport.ReviewCycleStartDate,101)
  + ' - ' + Convert(nvarchar(10), vEmployeeReviewCycleReport.ReviewCycleEndDate, 101)
END
```

### Filters

The template includes the following filters:

**Filters**

- Performance Cycle Start
- Performance Cycle End

**And** Review Cycle **In**

- Employee Review Cycle View Start Date Greater Than Equal @PFReviewStatusCustomEffectiveStart
- Employee Review Cycle View Start Date Less Than Equal @PFReviewStatusCustomEffectiveEnd
- Work Assignment Effective Start Less Than Equal 1/27/2017
- Work Assignment Effective End Greater Than Equal 1/27/2017
- Employee Employment Status EFFECTIVE Empty
- Primary Work Assignment Equal True
- Employee Review Cycle View Employee Role Equal False
- Employee Review Cycle View Manager Role Equal False

### Employee Review Overdue

The Employee Review Overdue report uses the Performance Review topic to display a list of employees who have not completed the employee review after the due date. It contains information about the employee and the review due date.

### Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>EE Review Due</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The Employee Review Overdue by Location is a variation of the Employee Review Overdue template. This variation uses the Performance Review topic to return a list of employees who have overdue reviews, with the records grouped by location.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>EE Review Due</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
</tbody>
</table>
### Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filter Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance Cycle Start</td>
<td>*</td>
</tr>
<tr>
<td>Performance Cycle End</td>
<td></td>
</tr>
<tr>
<td>And Employee Review Cycle View Review Cycle Start</td>
<td>In</td>
</tr>
<tr>
<td>And Employee Review Cycle View Review Cycle End</td>
<td>Greater Than Equal                                                    @PFReviewStatusCustomEffectiveStart</td>
</tr>
<tr>
<td>And Work Assignment Effective Start</td>
<td>Less Than Equal                                                       1/26/2017</td>
</tr>
<tr>
<td>And Work Assignment Effective End</td>
<td>Greater Than Equal                                                    1/26/2017</td>
</tr>
<tr>
<td>And Employee Employment Status Effective</td>
<td>Empty</td>
</tr>
<tr>
<td>And EE Review Due</td>
<td>Less Than Equal                                                       1/26/2017</td>
</tr>
<tr>
<td>And Primary Work Assignment</td>
<td>Equal                                                                True</td>
</tr>
<tr>
<td>And Employee Review Cycle View Employee I</td>
<td>Equal                                                                True</td>
</tr>
<tr>
<td>And Employee Review Cycle View Employee I</td>
<td>Not Equal                                                            True</td>
</tr>
</tbody>
</table>

### Employee Review Overdue by Manager

The Employee Review Overdue by Manager report is a variation of the Employee Review Overdue template. This variation uses the Performance Review topic to return the list of employees with overdue reviews, with the records grouped by manager.

### Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>EE Review Due</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
</tbody>
</table>
The Employee Review Overdue by Position report is a variation of the Employee Review Overdue template. This variation uses the Performance Review topic to return the list of employees with overdue reviews, with the records grouped by position.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>EE Review Due</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
</tbody>
</table>
Position | Yes | Ascending
---|---|---
Employee | A to Z | 
Location | Ascending |
Manager | A to Z |
Manager Email | A to Z |

**Filters**

The template includes the following filters:

- Performance Cycle Start
- Performance Cycle End
- Employee Review Cycle View Review Cycle
- Work Assignment Effective Start
- Work Assignment Effective End
- Employee Employment Status Effective
- EE Review Due
- Primary Work Assignment
- Employee Review Cycle View Employee ID
- Employee Review Cycle View Employee ID

**Employees with High Performance Rating**

The Employees with High Performance Rating report uses the Performance Review topic to display a list of employees who scored equal to or above a specified percentage on their performance review. It contains details about employees and their manager ratings.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
</tbody>
</table>
Rating PCT  |  Yes  |  Smallest to Largest
--- | --- | ---
Employee  |  A to Z  |  
Position  |  Ascending  |  
Location  |  Ascending  |  
Manager  |  A to Z  |  
Rating Value  |  A to Z  |  
Rating Name  |  A to Z  |  

**Custom Fields**

**Rating PCT**

The **Rating PCT** custom field displays the manager rating score in percentage. It uses the following expression:

```
CASE WHEN vEmployeeReviewCycleReport.ManagerRating IS NULL THEN 0.0 ELSE
CONVERT(Decimal(10,2), vEmployeeReviewCycleReport.ManagerRating * 100.0 /
vEmployeeReviewCycleReport.RatingScaleMaxValue) END
```

**Rating Value**

The **Rating Value** custom field displays the manager rating value. It uses the following expression:

```
CASE WHEN vEmployeeReviewCycleReport.ManagerRating IS NULL THEN 'Not Rated'
ELSE CONVERT(nvarchar(10), CONVERT(Decimal(10,2),
vEmployeeReviewCycleReport.ManagerRating)+' /'
'+CONVERT(nvarchar(10),CONVERT(Decimal(10,2),
vEmployeeReviewCycleReport.RatingScaleMaxValue))
END
```

**Filters**

The template includes the following filters:
Employees with Low Performance Rating

The Employees with Low Performance Rating report uses the Performance Review topic to display a list of employees who scored equal to or below a specified percentage on their performance review. It contains details about employees and their manager ratings.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Rating PCT</td>
<td>Yes</td>
<td>Smallest to Largest</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rating Value</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rating Name</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Rating (%)

Filters

Performance Cycle Start
Performance Cycle End

And Review

And Employee Review Cycle View Review Cycle... Greater Than Equal @PReviewStatusCustomEffectiveStart
And Employee Review Cycle View Review Cycle... Less Than Equal @PReviewStatusCustomEffectiveEnd
And Work Assignment Effective Start Less Than Equal 1/27/2017
And Work Assignment Effective End Greater Than Equal 1/27/2017
And Employee Employment Status Effective... Empty
And Rating PCT Not Empty
And Rating PCT Greater Than Equal
And Primary Work Assignment Equal True
The **Rating (%)** custom field displays the manager rating score in percentage. It uses the following expression:

```
CASE WHEN vEmployeeReviewCycleReport.ManagerRating IS NULL THEN null
ELSE CONVERT(Decimal(10,2), vEmployeeReviewCycleReport.ManagerRating * 100.0 / vEmployeeReviewCycleReport.RatingScaleMaxValue)
END
```

**Rating Value**

The **Rating Value** custom field displays the manager rating value. It uses the following expression:

```
CASE WHEN vEmployeeReviewCycleReport.ManagerRating IS NULL THEN 'Not Rated'
ELSE CONVERT(nvarchar(10), CONVERT(Decimal(10,2), vEmployeeReviewCycleReport.ManagerRating))+' /'+CONVERT(nvarchar(10),CONVERT(Decimal(10,2), vEmployeeReviewCycleReport.RatingScaleMaxValue))
END
```

**Filters**

The template includes the following filters:

- **Performance Cycle Start** *1/27/2017*
- **Performance Cycle End**
- **Employee Review Cycle View**
  - **Review** In *Please select a value* 0 Selected
  - Greater Than Equal @PFRreviewStatusCustomEffectiveStart
  - Less Than Equal @PFRreviewStatusCustomEffectiveEnd
- **Work Assignment Effective Start** 1/27/2017
- **Work Assignment Effective End** 1/27/2017
- **Employee Employment Status Effect** Empty
- **Rating PCT** Not Empty
- **Rating PCT** Less Than Equal
- **Primary Work Assignment** Equal True

**Historical Review Ratings**

The Historical Review Ratings report uses the Performance - Historical Reviews topic to display information about past employee ratings.
Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Cycle</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Review Date</td>
<td>Yes</td>
<td>Newest to Oldest</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reviewer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Rating</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rating Score</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comments</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Next Review Date</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:

And  Employment Status Group  Not Equal  Terminated
And  Employee Employment Sta...  Empty
And  Work Assignment Effective ...  Less Than Equal  5/24/2017
And  Work Assignment Effective ...  Greater Than E...  5/24/2017
And  Manager Effective Start     Less Than Equal  5/24/2017
And  Manager Effective End       Greater Than E...  5/24/2017
And  Primary Work Assignment    Equal  True

Manager Review Overdue

The Manager Review Overdue report uses the Performance Review topic to display a list of manager reviews that have not been completed by the due date. It contains information related
to the overdue reviews, including the due date, employee name number, position, location, and manager.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mgr Review Due</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager Email</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:

Filters

- Performance Cycle Start
- Performance Cycle End
- Employee Review Cycle View Review Cycle
- Work Assignment Effective Start
- Work Assignment Effective End
- Employee Employment Status Effective Start
- Mgr Review Due
- Primary Work Assignment
- Employee Review Cycle View Manager Is
- Employee Review Cycle View Manager Is Not

And Employee Review Cycle View Review Cycle Greater Than Equal @PFReviewStatusCustomEffectiveStart
And Employee Review Cycle View Review Cycle Less Than Equal @PFReviewStatusCustomEffectiveEnd
And Work Assignment Effective Start Less Than Equal 1/30/2017
And Work Assignment Effective End Greater Than Equal 1/30/2017
And Employee Employment Status Effective Start Empty
And Mgr Review Due Less Than
And Primary Work Assignment Equal True
And Employee Review Cycle View Manager Is Equal True
And Employee Review Cycle View Manager Is Not Equal True
Manager Review Overdue by Location

The Manager Review Overdue by Location report is a variation of the Manager Review Overdue template. This variation uses the Performance Review topic to return the list of overdue manager reviews, grouped by location.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mgr Review Due</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Manager Email</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:

Filters

<table>
<thead>
<tr>
<th>Performance Cycle Start</th>
<th>*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance Cycle End</td>
<td></td>
</tr>
<tr>
<td>And Employee Review Cycle View Review Cycle Start</td>
<td>Greater Than Equal</td>
</tr>
<tr>
<td>And Employee Review Cycle View Review Cycle Start</td>
<td>Less Than Equal</td>
</tr>
<tr>
<td>And Work Assignment Effective Start</td>
<td>Less Than Equal</td>
</tr>
<tr>
<td>And Work Assignment Effective End</td>
<td>Greater Than Equal</td>
</tr>
<tr>
<td>And Employee Employment Status Effective Date</td>
<td>Empty</td>
</tr>
<tr>
<td>And Mgr Review Due</td>
<td>Less Than</td>
</tr>
<tr>
<td>And Primary Work Assignment</td>
<td>Equal</td>
</tr>
<tr>
<td>And Employee Review Cycle View Manager Is Manager</td>
<td>Equal</td>
</tr>
<tr>
<td>And Employee Review Cycle View Manager Is Manager</td>
<td>Not Equal</td>
</tr>
</tbody>
</table>
Manager Review Overdue by Manager

The Manager Review Overdue by Manager report is a variation of the Manager Review Overdue template. This variation uses the Performance Review topic to return the list of overdue manager reviews, with the records grouped by manager.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mgr Review Due</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Manager Email</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:

Filters

- Performance Cycle Start
- Performance Cycle End
- Employee Review Cycle View Review Cycle... In
  - Employee Review Cycle View Review Cycle... Greater Than Equal
    - @PFReviewStatusCustomEffectiveStart
  - Employee Review Cycle View Review Cycle... Less Than Equal
    - @PFReviewStatusCustomEffectiveEnd
  - Work Assignment Effective Start
    - Less Than Equal
    - 1/30/2017
  - Work Assignment Effective End
    - Greater Than Equal
    - 1/30/2017
  - Employee Employment Status Effective...
    - Empty
  - Mgr Review Due
    - Less Than
  - Primary Work Assignment
    - Equal
    - True
  - Employee Review Cycle View Manager Is...
    - Equal
    - True
  - Employee Review Cycle View Manager Is...
    - Not Equal
    - True
Manager Review Overdue by Position

The Manager Review Overdue by Position report is a variation of the Manager Review Overdue template. This variation uses the Performance Review topic to return the list of overdue manager reviews, with the records grouped by position.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mgr Review Due</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager Email</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:

Filters

- Performance Cycle Start
- Performance Cycle End
- Employee Review Cycle View Review Cycle Start Greater Than Equal @PFReviewStatusCustomEffectiveStart
- Employee Review Cycle View Review Cycle Start Less Than Equal @PFReviewStatusCustomEffectiveEnd
- Work Assignment Effective Start Less Than Equal 1/26/2017
- Work Assignment Effective End Greater Than Equal 1/26/2017
- Employee Employment Status Effective... Empty
- EE Review Due Less Than
- Primary Work Assignment Equal True
- Employee Review Cycle View Employee I... Equal True
- Employee Review Cycle View Employee I... Not Equal True
Performance Review Distribution

The Performance Review Distribution report is a variation of the Performance Review Distribution - Details template. This report uses the Performance Review topic to display the performance distribution for a selected review cycle, with fewer details about the employee and the review.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Cycle</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Manager Rating</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reviewer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emp Rating</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emp Rating Value</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mgr Rating Value</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Period</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Manager Rating Name

The **Manager Rating Name** custom field displays the manager rating name. It uses the following expression:

```sql
CASE WHEN vEmployeeReviewCycleReport.ManagerPFRatingScaleIncrementName is null THEN 'Not Rated'
ELSE vEmployeeReviewCycleReport.ManagerPFRatingScaleIncrementName
END
```

Reviewer Name

The **Reviewer Name** custom field displays the reviewer name or login ID. It uses the following expression:

```sql
isNull(AppUserEmployee.DisplayName, AppUserEmployee.LoginId)
```

Employee Rating Value

The **Employee Rating Value** custom field displays the employee rating value. It uses the following expression:
CASE WHEN vEmployeeReviewCycleReport.EmployeeRating IS NULL THEN 'Not Rated'
ELSE Convert(nvarchar(10), Convert(Decimal(10, 2),
vEmployeeReviewCycleReport.EmployeeRating))
END

Manager Rating Value

The Manager Rating Value custom field displays the manager rating value. It uses the following expression:

CASE WHEN vEmployeeReviewCycleReport.ManagerRating IS NULL THEN 'Not Rated'
ELSE Convert(nvarchar(10), Convert(Decimal(10, 2),
vEmployeeReviewCycleReport.ManagerRating))
END

Review Status

The Review Status custom field displays the review status. It uses the following expression:

CASE
WHEN PerformanceReviewStatusCustom.Status = 'NotStarted' THEN 'Not Started'
WHEN PerformanceReviewStatusCustom.Status = 'SelfReview' THEN 'Self Review'
WHEN PerformanceReviewStatusCustom.Status = 'ManagerReview' THEN 'Manager Review'
WHEN PerformanceReviewStatusCustom.Status = 'EmployeeAcknowledged' THEN 'Pending Employee Signature'
WHEN PerformanceReviewStatusCustom.Status = 'ManagerAcknowledged' THEN 'Pending Manager Signature'
WHEN PerformanceReviewStatusCustom.Status = 'ReviewCompleted' THEN 'Review Completed'
ELSE ''
END

Review Period

The Review Period custom field displays the review period. It uses the following expression:

CASE
WHEN vEmployeeReviewCycleReport.ReviewCycleStartDate is null THEN ''
ELSE Convert(nvarchar(10),
END

Filters

The template includes the following filters:
The Performance Review Distribution - Details report uses the Performance Review topic to display the performance distribution of employees' overall ratings for a selected review cycle with all of the employee and review details. It contains employee details, as well as information about manager and employee ratings.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Rating Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Review Cycle Name</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tenure (years)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reviewer Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Period</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Employee Rating Value
Employee Rating Name
Manager Rating Value

**Custom Fields**

**Manager Rating Name**

The **Manager Rating Name** custom field displays the rating name or indicate if the review has not been rated. It uses the following expression:

```sql
CASE WHEN vEmployeeReviewCycleReport.ManagerPFRatingScaleIncrementName is null THEN 'Not Rated'
ELSE vEmployeeReviewCycleReport.ManagerPFRatingScaleIncrementName
END
```

**Tenure (years)**

The **Tenure (years)** custom field displays the number of years the employee has worked. It uses the following expression:

```sql
Convert(Decimal(10, 2), Datediff(DAY, Employee.OriginalHireDate, GETDATE())/365.0)
```

**Reviewer Name**

The **Reviewer Name** custom field displays reviewer name or login ID. It uses the following expression:

```sql
ISNULL(AppUserEmployee.DisplayName, AppUserEmployee.LoginId)
```

**Review Status**

The **Review Status** custom field displays the status of the performance review. It uses the following expression:

```sql
CASE
WHEN PerformanceReviewStatusCustom.Status = 'NotStarted' THEN 'Not Started'
WHEN PerformanceReviewStatusCustom.Status = 'SelfReview' THEN 'Self Review'
WHEN PerformanceReviewStatusCustom.Status = 'ManagerReview' THEN 'Manager Review'
WHEN PerformanceReviewStatusCustom.Status = 'EmployeeAcknowledged' THEN 'Pending Employee Signature'
WHEN PerformanceReviewStatusCustom.Status = 'ManagerAcknowledged' THEN 'Pending Manager Signature'
WHEN PerformanceReviewStatusCustom.Status = 'ReviewCompleted' THEN 'Review Completed'
ELSE ''
END
```
**Review Period**

The **Review Period** custom field displays the review period. It uses the following expression:

```sql
CASE WHEN vEmployeeReviewCycleReport.ReviewCycleStartDate is null THEN ''
END
```

**Employee Rating Value**

The **Employee Rating Value** custom field displays the employee rating value given by the employee. It uses the following expression:

```sql
CASE WHEN vEmployeeReviewCycleReport.EmployeeRating IS NULL THEN 'Not Rated'
ELSE Convert(nvarchar(10), Convert(Decimal(10, 2), vEmployeeReviewCycleReport.EmployeeRating))
END
```

**Manager Rating Value**

The **Manager Rating Value** custom field displays the rating value for the employee given by the manager. It uses the following expression:

```sql
CASE WHEN vEmployeeReviewCycleReport.ManagerRating IS NULL THEN 'Not Rated'
ELSE Convert(nvarchar(10), Convert(Decimal(10, 2), vEmployeeReviewCycleReport.ManagerRating))
END
```

**Filters**

The template includes the following filters:
Performance Review Status by Review Cycle

The Performance Review Status by Review Cycle report uses the Performance Review topic to display the overall performance rating status, with the records grouped by Review Cycle Name.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Cycle</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reviewer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emp Rating Value</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emp Rating Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mgr Rating Value</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mgr Rating Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Period</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Reviewer Name

The Reviewer Name custom field displays the reviewer's name or login ID. It uses the following expression:
Review Status

The **Review Status** custom field displays the review status. It uses the following expression:

```sql
CASE
    WHEN PerformanceReviewStatusCustom.Status = 'NotStarted' THEN 'Not Started'
    WHEN PerformanceReviewStatusCustom.Status = 'SelfReview' THEN 'Self Review'
    WHEN PerformanceReviewStatusCustom.Status = 'ManagerReview' THEN 'Manager Review'
    WHEN PerformanceReviewStatusCustom.Status = 'EmployeeAcknowledged' THEN 'Pending Employee Signature'
    WHEN PerformanceReviewStatusCustom.Status = 'ManagerAcknowledged' THEN 'Pending Manager Signature'
    WHEN PerformanceReviewStatusCustom.Status = 'ReviewCompleted' THEN 'Review Completed'
    ELSE ''
END
```

Employee Rating Value

The **Employee Rating Value** custom field displays the employee's rating value. It uses the following expression:

```sql
```

Manager Rating Value

The **Manager Rating Value** custom field displays the manager's rating value. It uses the following expression:

```sql
```

Review Period

The **Review Period** custom field displays the review period. It uses the following expression:

```sql
```

Filters

The template includes the following filters:
The Performance Review Status by Review Cycle - Details report uses the Performance Review topic to display the status of employees' performance reviews and the overall rating for a selected review with all of the employee and review details. It contains columns such as employee self review and manager ratings, and review status.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Cycle</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tenure in yrs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reviewer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emp Rating Value</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Emp Rating Name
Submitted by Emp
Mgr Rating Value
Mgr Rating Name
Submitted by Mgr
Review Period

Custom Fields

Tenure (years)
The **Tenure (years)** custom field displays the number of years the employee has worked. It uses the following expression:

\[
\text{Convert(Decimal(10, 2), Datediff(DAY, Employee.OriginalHireDate, GETDATE())/365.0)}
\]

Reviewer Name

The **Reviewer Name** custom field displays the reviewer name or login ID. It uses the following expression:

\[
\text{ISNULL(AppUserEmployee.DisplayName, AppUserEmployee.LoginId)}
\]

Review Status

The **Review Status** custom field displays the status of the performance review. It uses the following expression:

\[
\begin{align*}
\end{align*}
\]

Employee Rating Value

The **Employee Rating Value** custom field displays the rating value for the employee given by the employee. It uses the following expression:

\[
\text{CASE WHEN vEmployeeReviewCycleReport.EmployeeRating IS NULL THEN 'Not Rated' ELSE Convert(nvarchar(10), Convert(Decimal(10, 2), vEmployeeReviewCycleReport.EmployeeRating)) END}
\]

Submitted by Employee

The **Submitted by Employee** custom field indicates if the review has been submitted by the employee. It uses the following expression:
CASE WHEN vEmployeeReviewCycleReport.EmployeeIsPublished = 1 THEN 'Yes'
ELSE 'No'
END

**Manager Rating Value**

The **Manager Rating Value** custom field displays the employee rating value given by the manager. It uses the following expression:

```
CASE WHEN vEmployeeReviewCycleReport.ManagerRating IS NULL THEN 'Not Rated'
ELSE Convert(nvarchar(10), Convert(Decimal(10, 2),
vEmployeeReviewCycleReport.ManagerRating)) END
```

**Submitted by Manager**

The **Submitted by Manager** custom field displays if the review has been submitted by the manager. It uses the following expression:

```
CASE WHEN vEmployeeReviewCycleReport.ManagerIsPublished = 1 THEN 'Yes'
ELSE 'No'
END
```

**Review Period**

The **Review Period** custom field displays the review period. It uses the following expression:

```
CASE WHEN vEmployeeReviewCycleReport.ReviewCycleStartDate is null THEN ''
ELSE
Convert(nvarchar(10), vEmployeeReviewCycleReport.ReviewCycleStartDate,101) + ' - ' + Convert(nvarchar(10),
vEmployeeReviewCycleReport.ReviewCycleEndDate, 101)
END
```

**Filters**

The template includes the following filters:
Performance Review Trend

The Performance Review Trend report is a variation of the Performance Review Trend - Details template. This variation uses the Performance Review topic to display overall performance rating trends, with fewer details about the employee and the review.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Review Period</td>
<td></td>
<td>Z to A</td>
<td></td>
</tr>
<tr>
<td>Reviewer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Cycle</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mgr Rating Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mgr Rating Value</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mgr Rating in PCT</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Reviewer Name

The **Reviewer Name** custom field displays the reviewer name or login ID. It uses the following expression:
Review Period

The **Review Period** custom field displays the review period. It uses the following expression:

\[
\text{CASE WHEN } \text{vEmployeeReviewCycleReport.ReviewCycleStartDate} \text{ is null THEN ''}\backslash''\text{ ELSE Convert(nvarchar(10), vEmployeeReviewCycleReport.ReviewCycleStartDate,101)}\backslash''\text{ + ' - ' + Convert(nvarchar(10), vEmployeeReviewCycleReport.ReviewCycleEndDate, 101)}\text{ END}
\]

Review Status

The **Review Status** custom field displays the status of the performance review. It uses the following expression:

\[
\text{CASE WHEN PerformanceReviewStatusCustom.Status} = '\text{NotStarted}' \text{ THEN 'Not Started' WHEN PerformanceReviewStatusCustom.Status} = '\text{SelfReview}' \text{ THEN 'Self Review' WHEN PerformanceReviewStatusCustom.Status} = '\text{ManagerReview}' \text{ THEN 'Manager Review' WHEN PerformanceReviewStatusCustom.Status} = '\text{EmployeeAcknowledged}' \text{ THEN 'Pending Employee Signature' WHEN PerformanceReviewStatusCustom.Status} = '\text{ManagerAcknowledged}' \text{ THEN 'Pending Manager Signature' WHEN PerformanceReviewStatusCustom.Status} = '\text{ReviewCompleted}' \text{ THEN 'Review Completed' ELSE ''}\backslash''\text{ END}
\]

Manager Rating Value

The **Manager Rating Value** custom field displays the manager rating value. It uses the following expression:

\[
\]

Manager Rating Score in %

The **Manager Rating Score in %** custom field displays the manager rating score in percentage. It uses the following expression:

\[
\text{ END}
\]

Filters

The template includes the following filters:
### Performance Review Trend - Details

The Performance Review Trend - Details report uses the Performance Review topic to display the overall performance rating trend of employees for one or more selected review cycles with all of the employee and review details. It contains columns such as review cycle name, employee self-review ratings, and manager review ratings.

### Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reviewer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tenure in yrs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Cycle</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Period</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emp Rating Value</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Emp Rating in PCT

Emp Rating Name

Submitted by Emp

Mgr Rating Value

Mgr Rating in PCT

Mgr Rating Name

Submitted by Mgr

Custom Fields

Reviewer Name

The **Reviewer Name** custom field displays the reviewer name or login ID. It uses the following expression:

```sql
ISNULL(AppUserEmployee.DisplayName, AppUserEmployee.LoginId)
```

Tenure (years)

The **Tenure (years)** custom field displays the number of years the employee has worked. It uses the following expression:

```sql
Convert(Decimal(10, 2), Datediff(DAY, Employee.OriginalHireDate, GETDATE()) / 365.0)
```

Review Period

The **Review Period** custom field displays the review period. It uses the following expression:

```sql
```

Review Status

The **Review Status** custom field displays the status of the performance review. It uses the following expression:

```sql
```

Employee Rating Value
The **Employee Rating Value** custom field displays the rating value for the employee given by the employee. It uses the following expression:

```sql
CASE WHEN vEmployeeReviewCycleReport.EmployeeRating IS NULL THEN 'Not Rated'
ELSE CONVERT(nvarchar(10), CONVERT(Decimal(10,2),
    vEmployeeReviewCycleReport.EmployeeRating)) + '
' + CONVERT(nvarchar(10), CONVERT(Decimal(10,2),
    vEmployeeReviewCycleReport.RatingScaleMaxValue))
END
```

**Employee Rating Score in %**

The **Employee Rating Score in %** custom field displays the employee rating score as a percentage. It uses the following expression:

```sql
CASE WHEN vEmployeeReviewCycleReport.EmployeeRating IS NULL THEN null
ELSE CONVERT(nvarchar(10), CONVERT(Decimal(10,2),
END
```

**Submitted by Employee**

The **Submitted by Employee** custom field indicates if the employee submitted the review. It uses the following expression:

```sql
CASE WHEN vEmployeeReviewCycleReport.EmployeeIsPublished = 1 THEN 'Yes'
ELSE 'No'
END
```

**Manager Rating Value**

The **Manager Rating Value** custom field displays the rating value for the employee given by the manager. It uses the following expression:

```sql
CASE WHEN vEmployeeReviewCycleReport.ManagerRating IS NULL THEN 'Not Rated'
ELSE CONVERT(nvarchar(10), CONVERT(Decimal(10,2),
    vEmployeeReviewCycleReport.ManagerRating)) + '
' + CONVERT(nvarchar(10), CONVERT(Decimal(10,2),
    vEmployeeReviewCycleReport.RatingScaleMaxValue))
END
```

**Manager Rating Score in %**

The **Manager Rating Score in %** custom field displays the manager rating score as a percentage. It uses the following expression:

```sql
CASE WHEN vEmployeeReviewCycleReport.ManagerRating IS NULL THEN null
ELSE CONVERT(nvarchar(10), CONVERT(Decimal(10,2),
END
```
Submitted by Manager

The **Submitted by Manager** custom field indicates if the manager submitted the review. It uses the following expression:

```sql
CASE WHEN vEmployeeReviewCycleReport.ManagerIsPublished = 1 THEN 'Yes'
ELSE 'No'
END
```

Filters

The template includes the following filters:

| Performance Cycle Start |  *
| Performance Cycle End |

<table>
<thead>
<tr>
<th>And</th>
<th>Review Cycle</th>
<th>In</th>
<th>*</th>
</tr>
</thead>
<tbody>
<tr>
<td>And</td>
<td>Employee Review Cycle View Review...</td>
<td>Greater Than Equal</td>
<td>@FReviewStatusCustomEffectiveStart</td>
</tr>
<tr>
<td>And</td>
<td>Employee Review Cycle View Review...</td>
<td>Less Than Equal</td>
<td>@FReviewStatusCustomEffectiveEnd</td>
</tr>
<tr>
<td>And</td>
<td>Work Assignment Effective Start</td>
<td>Less Than Equal</td>
<td>1/31/2017</td>
</tr>
<tr>
<td>And</td>
<td>Work Assignment Effective End</td>
<td>Greater Than Equal</td>
<td>1/31/2017</td>
</tr>
<tr>
<td>And</td>
<td>Employee Employment Status Effect...</td>
<td>Empty</td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Primary Work Assignment</td>
<td>Equal</td>
<td>True</td>
</tr>
<tr>
<td>And</td>
<td>Employee Display Name</td>
<td>In</td>
<td>*</td>
</tr>
</tbody>
</table>

Performance Reviews - Additional Questions

The Performance Reviews - Additional Questions report uses the Performance Review - Additional Questions topic to display the responses that managers and employees provided to the additional questions in the review form. Administrators can use this report to view all ratings and comments for individual additional questions for all employees in the organization. Managers can use the report to view responses from their team or from individual employees.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Cycle</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
</tbody>
</table>
The Plan & Schedule category contains reports that display information about your organization’s planning and scheduling. The data in these reports comes from the Workforce Management module.

Schedules

The Plan & Schedule > Schedules category contains reports about your organization’s schedules, including schedule change information.
**Schedule Change**

The Schedule Change report uses the Schedule Changes topic to display changes to schedules that were made during or close to the start or end of a shift.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Change Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Last Updated</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shift Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reason</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Previous Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Previous End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Updated By</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comment</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Type**

The **Type** custom field displays the schedule change type. It uses the following expression:

\[
\text{IIF}(\text{ScheduleChangeReason.ScheduleChangeType} = 0, \text{'Non Excused'}, \\
\text{IIF}(\text{ScheduleChangeReason.ScheduleChangeType} = 1, \text{'Excused'}, \text{'Undefined'}))
\]

**Filters**

The template includes the following filters:
Schedule Change Audit

The Schedule Change Audit report uses the Schedule Changes Audit topic to display a history of changes to current schedules that were made during or close to the start of a shift.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Change Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Last Updated</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shift Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reason</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Previous Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Previous End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Updated By</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comment</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Type
The **Type** custom field displays the schedule change type. It uses the following expression:

```
IIF(ScheduleChangeReason.ScheduleChangeType = 0, 'Non Excused',
   IIF(ScheduleChangeReason.ScheduleChangeType = 1, 'Excused', 'Undefined'))
```

**Filters**

The template includes the following filters:

<table>
<thead>
<tr>
<th>And</th>
<th>Change Date</th>
<th>Greater Than Equal</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>And</td>
<td>Change Date</td>
<td>Less Than Equal</td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Location</td>
<td>In</td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Employee Display Name</td>
<td>In</td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Updated By</td>
<td>In</td>
<td></td>
</tr>
</tbody>
</table>

**Recruiting Reports**

**Vietnam Era Veterans Readjustment Assistance Act - VEVRAA**

The Vietnam Era Veterans Readjustment Assistance Act - VEVRAA report is based on the topic by the same name. It displays information about candidates and employees designated as Vietnam era veterans, including candidate or employee information and job or application information.

**Fields**

This template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate/Employee Name</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Req Id</td>
<td></td>
<td>Smallest to Largest</td>
<td></td>
</tr>
<tr>
<td>Is Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candidate/Employee Ethnicity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candidate/Employee Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Candidate/Employee Protected Veteran Status
Candidate/Employee Is Protected Veteran
Original Hire Date
Employee Start Date
Home Address Postal Code
Job Req Id
Job
Department
Application Date
Application Status
Job Family
Pay Grade
Location
Work Location Postal Code
Referral Source

**Custom Fields**

**Is Employee**

The **Is Employee** custom field indicates if the Vietnam Era Veteran is an employee. It uses the following expression:

```
CASE WHEN (Employee.StartDate IS NOT NULL AND EmploymentStatusGroup.ShortName != 'Terminated' AND EmployeeEmploymentStatus.EffectiveEnd IS NULL) THEN 'True' ELSE 'False' END
```

**Candidate/Employee Name**

The **Candidate/Employee Name** custom field displays the name of the Vietnam Era Veteran. It uses the following expression:

```
CASE WHEN (Employee.StartDate IS NOT NULL) AND (Employee.DisplayName IS NOT NULL) THEN Employee.DisplayName ELSE Candidate.DisplayName END
```

**Candidate/Employee Ethnicity**

The **Candidate/Employee Ethnicity** custom field displays the candidate's ethnicity. It uses the following expression:

```
CASE
```

WHEN QuestionnaireResponseVEVRAA.Ethnicity IS NOT NULL THEN QuestionnaireResponseVEVRAA.Ethnicity ELSE DFEthnicity.ShortName END

**Candidate/Employee Gender**

The **Candidate/Employee Gender** custom field displays the candidate's gender. It uses the following expression:

```sql
CASE
  WHEN QuestionnaireResponseVEVRAA.Gender IS NOT NULL THEN QuestionnaireResponseVEVRAA.Gender ELSE Employee.Gender END
```

**Application Date**

The **Application Date** custom field displays the application date. It uses the following expression:

```sql
CAST(JobPostingApplication.LastModifiedTimestamp AS DATETIME)
```

**Filters**

This template includes the following filters:

- **And** Candidate/Employee Protected Veteran Status Not Empty
- **And** Application Date Greater Than Equal *
- **And** Application Date Less Than
- **And** Job Posting Application Status Effective End Empty
- **And** Employee Employment Status Effective End Empty

**Candidates**

The **Recruiting > Candidates** category contains reports about your organization's job requisition candidates. You can use these reports to view lists of candidates and information about candidate activity. The data in these reports comes from the candidate applications that are associated with job requisitions in the **Job Requisitions** tab of Recruiting. It also comes from the candidates in the **Talent Community** tab.

**Candidate - New Hire**

The Candidate - New Hire report uses the Recruiting topic to display information about new hire records, such as the employee name, SIN, and birth date.

**Fields**

The template includes the following fields:
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Hire Name</td>
<td>A to Z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee SSN/SIN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Birth Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Original Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Base Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Start Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Requisition Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Requisition Id</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Application Status Group Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Application Status Reason Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Requisition Hiring Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Requisition Assigned Recruiter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Application Source</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:
Candidate Activity

The Candidate Activity report uses the Recruiting topic to display information about a candidate’s status including their application date, application status, and whether the candidate is internal or external.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate Display Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Candidate Type</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Application Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Job Requisition Id</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Requisition Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Application Status Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Application Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Original Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Application Source</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Requisition Hiring Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Requisition Assigned Recruiter</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Candidate Type

The Candidate Type custom field indicates if the candidate is internal or external. It uses the following expression:

```sql
CASE
    WHEN Candidate.IsInternal = 0 THEN 'External'
```
WHEN Candidate.IsInternal = 1 THEN 'Internal'
END

**Application Date**

The **Application Date** custom field displays the application date. It uses the following expression:

```sql
CAST(JobPostingApplication.LastModifiedTimestamp AS DATETIME)
```

**Filters**

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>And Application Date</td>
<td>Greater Than Equal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Application Date</td>
<td>Less Than</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Job Requisition Assigned Recruiter</td>
<td>Contains</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Job Requisition Hiring Manager</td>
<td>Contains</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Is Deactivated</td>
<td>Equal</td>
<td>False</td>
<td></td>
</tr>
<tr>
<td>And Application Status Name</td>
<td>In</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Internal Candidate</td>
<td>Equal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Employee Employment Status Effective End</td>
<td>Empty</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Job Posting Effective End</td>
<td>Empty</td>
<td></td>
<td>1/1/2050</td>
</tr>
<tr>
<td>And Job Effective End</td>
<td>Empty</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Job Posting Application Status Effective End</td>
<td>Empty</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Job Requisition Status Effective End</td>
<td>Empty</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Candidate Effective End</td>
<td>Empty</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Candidate EEO**

The Candidate EEO report uses the Candidate EEO topic to display candidate details such as demographic, application and questionnaire information, and allows reporting on equal employment opportunity.

**Fields**

This template includes the following fields:
<table>
<thead>
<tr>
<th>Field</th>
<th>Sort Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Req Id</td>
<td>Smallest to Largest</td>
</tr>
<tr>
<td>Candidate Name</td>
<td>A to Z</td>
</tr>
<tr>
<td>Candidate Ethnicity</td>
<td></td>
</tr>
<tr>
<td>Candidate Gender</td>
<td></td>
</tr>
<tr>
<td>Veteran Status</td>
<td></td>
</tr>
<tr>
<td>Disability</td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
</tr>
<tr>
<td>Application Status</td>
<td></td>
</tr>
<tr>
<td>Application Status Reason</td>
<td></td>
</tr>
<tr>
<td>Application Date/Time</td>
<td></td>
</tr>
<tr>
<td>Job Family</td>
<td></td>
</tr>
<tr>
<td>Pay Grade</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
</tr>
<tr>
<td>Referral Source</td>
<td></td>
</tr>
<tr>
<td>Recruiter</td>
<td></td>
</tr>
<tr>
<td>Hiring Manager</td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Application Date/Time**

The **Application Date/Time** custom field displays the application date and time. It uses the following expression:

```
JobPostingApplication.LastModifiedTimestamp
```

**Filters**

This template includes the following filters:

```
And Application Date Greater Than Equal *
And Application Date Less Than
And Is Candidate Status Equal True
And Job Posting Application Status Effective End Empty
```

**Candidates by Manager**

The Candidates by Manager report uses the Recruiting topic to display a list of active candidates grouped by hiring manager. It contains information about candidates and their
applications, including job requisition title and ID, application date/time and status, recruiter, and location. Recruiters can use this report to view all active candidates for each manager.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiring Manager</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Candidate Name</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Application Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Req Id</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Req Title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Application Date/Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruiter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Application Date/Time**

The **Application Date/Time** custom field displays the application date and time. It uses the following expression:

```
JobPostingApplication.LastModifiedTimestamp
```

**Filters**

The template includes the following filters:

```
And Application Date Greater Than Equal *
And Application Date Less Than Equal
And Job Req Id Equal
And Hiring Manager Contains
And Recruiter Contains
And Is Deactivated Equal False
And Candidate Name Not Empty
And Job Posting Application Status Effective End Empty
```
Candidates by Name

The Candidates by Name report uses the Recruiting topic to display a list of candidates grouped by candidate name. It contains information about candidates and their applications, including job requisition title and ID, application date/time and status, recruiter, hiring manager, and location. Recruiters can use this report to view all active candidates listed by name.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Job Req Id</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Application Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Req Title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Application Date/Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hiring Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruiter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Application Date/Time

The Application Date/Time custom field displays the application date and time. It uses the following expression:

```
JobPostingApplication.LastModifiedTimestamp
```

Filters

The template includes the following filters:
Candidates by Recruiter

The Candidates by Recruiter report uses the Recruiting topic to display a list of active candidates grouped by recruiter. It contains information about candidates and their applications, including job requisition title and ID, application date/time and status, recruiter, hiring manager, and location. Recruiters can use this report to view all active candidates for each recruiter.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruiter</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Candidate Name</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Application Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Req Id</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Req Title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Application Date/Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hiring Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Application Date/Time

The Application Date/Time custom field displays the application date and time. It uses the following expression:

```
JobPostingApplication.LastModifiedTimestamp
```
Filters

The template includes the following filters:

Filters

<table>
<thead>
<tr>
<th>Filter Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Req Id</td>
<td>Yes</td>
<td>Smallest to Largest</td>
<td></td>
</tr>
<tr>
<td>Job Req Title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candidate Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Application Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Application Date/Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hiring Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruiter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Deactivated</td>
<td>Equal</td>
<td>False</td>
<td></td>
</tr>
<tr>
<td>Job Posting Application Status Effective End</td>
<td>Empty</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Candidates by Requisition

The Candidates by Requisition report uses the Recruiting topic to display a list of active candidates grouped by requisition. It contains information about candidates and their applications, including job requisition title and ID, application date/time and status, recruiter, hiring manager, and location. Recruiters can use this report to view all active candidates for each requisition.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Req Id</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Req Title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candidate Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Application Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Application Date/Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hiring Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruiter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Application Date/Time

The Application Date/Time custom field displays the application date and time. It uses the following expression:
Filters

The template includes the following filters:

Filters

<table>
<thead>
<tr>
<th>Filter</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>And Application Date Greater Than Equal</td>
<td>Smallest to Largest</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Application Date Less Than Equal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Job Req Id Not Empty</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Hiring Manager Contains</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Recruiter Contains</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Is Deactivated Equal</td>
<td>False</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And Job Posting Application Status Effective End Empty</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Candidates by Status

The Candidates by Status report uses the Recruiting topic to display a list of active candidates grouped by candidate status. Recruiters can use this report to view a list of candidates that have each application status during a specified date range.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Req Id</td>
<td></td>
<td>Smallest to Largest</td>
<td></td>
</tr>
<tr>
<td>Application Status</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candidate Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Req Title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Application Date/Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hiring Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruiter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Application Date/Time

The **Application Date/Time** custom field displays the application date and time. It uses the following expression:
Filters

The template includes the following filters:

```
<table>
<thead>
<tr>
<th>And</th>
<th>Application Date</th>
<th>Greater Than Equal</th>
</tr>
</thead>
<tbody>
<tr>
<td>And</td>
<td>Application Date</td>
<td>Less Than Equal</td>
</tr>
<tr>
<td>And</td>
<td>Job Req Id</td>
<td>Equal</td>
</tr>
<tr>
<td>And</td>
<td>Application Status Group Name</td>
<td>In</td>
</tr>
<tr>
<td>And</td>
<td>Hiring Manager</td>
<td>Contains</td>
</tr>
<tr>
<td>And</td>
<td>Recruiter</td>
<td>Contains</td>
</tr>
<tr>
<td>And</td>
<td>Is Deactivated</td>
<td>Equal</td>
</tr>
<tr>
<td>And</td>
<td>Job Posting Application Status Effective End</td>
<td>Empty</td>
</tr>
</tbody>
</table>
```

Internal Candidates

The Internal Candidates report uses the Recruiting topic to display a list of internal candidates with requisition information. Recruiters can use this report to view a list of internal candidates within a specified date range.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate Name</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Application Date/Time</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Application Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Req Id</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Req Title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hiring Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruiter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Application Date/Time
The **Application Date/Time** custom field displays the application date and time. It uses the following expression:

```
JobPostingApplication.LastModifiedTimestamp
```

### Filters

The template includes the following filters:

```
<table>
<thead>
<tr>
<th>And</th>
<th>Application Date</th>
<th>Greater Than Equal</th>
</tr>
</thead>
<tbody>
<tr>
<td>And</td>
<td>Application Date</td>
<td>Less Than Equal</td>
</tr>
<tr>
<td>And</td>
<td>Is Deactivated</td>
<td>Equal</td>
</tr>
<tr>
<td>And</td>
<td>Application Status</td>
<td>In</td>
</tr>
<tr>
<td>And</td>
<td>Internal Candidate</td>
<td>Equal</td>
</tr>
<tr>
<td>And</td>
<td>Hiring Manager</td>
<td>Contains</td>
</tr>
<tr>
<td>And</td>
<td>Recruiter</td>
<td>Contains</td>
</tr>
</tbody>
</table>
```

### Hires

The **Recruiting > Hires** category contains reports about candidates in your organization who have a hired status. You can use these reports to view lists of hires by manager, name, recruiter, or requisition.

### Hires by Manager

The Hires by Manager report uses the Recruiting topic to display a list of candidates who have a hired status, grouped by hiring manager. Recruiters can use this report to view a list of candidates who have been hired under each hiring manager.

### Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiring Manager</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Job Req Id</td>
<td></td>
<td>Smallest to Largest</td>
<td></td>
</tr>
<tr>
<td>Job Req Title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Original Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The template includes the following filters:

**Filters**

**Hires by Name**

The Hires by Name report uses the Recruiting topic to display hire information for a specific hire, with the records grouped by name. Recruiters can use this report to view a list of all candidates who have been hired, listed by name.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Job Req Id</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Req Title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Original Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hiring Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruiter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:
Hires by Recruiter

The Hires by Recruiter report uses the Recruiting topic to display employee hire information for a specific hire date or date range, with the records grouped by recruiter. Recruiters can use this report to view a list of all candidates who have been hired by each recruiter.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruiter</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Job Req Id</td>
<td></td>
<td>Smallest to Largest</td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Original Hire Date</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Job Req Title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hiring Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruiter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template includes the following filters:
Hires by Requisition

The Hires by Requisition report uses the Recruiting topic to display employee hire information for a specific hire date or date range grouped by requisition. Recruiters can use this report to view a list of all candidates who have been hired for each requisition.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Req Id</td>
<td>Yes</td>
<td>Smallest to Largest</td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Job Req Title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hiring Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruiter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Original Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Filters

The template contains the following filters:
Job Requisitions

The Recruiting > Job Requisitions category contains reports about your organization’s job requisitions. You can use these reports to view lists of open or filled requisitions. The data in these reports comes from the Job Requisitions tab in Recruiting.

Job Requisitions

The Job Requisitions report uses the Job Requisitions topic to display open requisitions and associated requisition details.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Req</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Job Req Id</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Req Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No. of Openings</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Class</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submitter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reason</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Justification</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Similar Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vacating Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Request Date</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The template includes the following filters:

- And Request Date Greater Than Equal *
- And Request Date Less Than Equal *
- And Req Status In
  - Please select a value
- And Job Requisition Status Effective End Empty

**Job Requisitions - Filled**

The Job Requisitions - Filled report uses the Job Requisitions topic to display a list of job requisitions that have the status “filled.” Recruiters can use this report to view a list of their filled requisitions.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Req Id</td>
<td>Yes</td>
<td>Smallest to Largest</td>
<td></td>
</tr>
<tr>
<td>Job Req</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Req Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Openings</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Class</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submitter</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Reason for Opening
Justification
Similar Employee
Vacating Employee
Request Date
Job Start Date
Job End Date
Posting Start Date
Posting End Date
Hiring Manager
Recruiter

Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filters</th>
<th>Request Date</th>
<th>Greater Than Equal</th>
</tr>
</thead>
<tbody>
<tr>
<td>And</td>
<td>Req Status</td>
<td>In</td>
</tr>
<tr>
<td>And</td>
<td>Hiring Manager</td>
<td>Contains</td>
</tr>
<tr>
<td>And</td>
<td>Recruiter</td>
<td>Contains</td>
</tr>
</tbody>
</table>

Time and Attendance Reports

The **Time & Attendance** category contains reports that display information about your organization’s schedules, punches, and time away information. The data in these reports comes from the **Workforce Management** module’s features such as **Schedules**, **Time Away**, and clock punches.

Entitlements and Balances

The **Time & Attendance > Entitlements & Balances** category contains reports about employee accruals for grant-based and other entitlements. The data for these reports comes from the **Time Away List** and **Timesheets** features.
**Entitlement Balance and Accruals**

The Entitlement Balance and Accruals report uses the Entitlement Balances and Accruals topic to display employee's entitlement balances, accruals, and grants, as well as the balance period for the entitlement(s) included in the report.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Effective From</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Balance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unit</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective To</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grant</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Available Grant</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accrued</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Value</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

The template includes the following filters:
The reports in the Time & Attendance > Pay category display pay information from the Workforce Management module. The reports include information such as pay amounts, hours, overtime, and pay categories.

Employee Pay Summary

The Employee Pay Summary report uses the Employee Pay Summary topic to display details about employee pay. You can report on multiple locations at once and include information such as pay code, category, labor metrics, and punches.

Fields

The template includes the following fields:
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Pay Date</td>
<td></td>
<td>Z to A</td>
<td></td>
</tr>
<tr>
<td>Pay Code</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Pay Category</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Period</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hours</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rounded In Out</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Punches</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Comments</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager Comments</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Pay Period**

The Pay Period custom field displays the numeric value that designates a pay period sequence. It uses the following expression:

```sql
ISNULL(PayGroupCalendar.PayPeriod, '') + ' ' +
ISNULL(PayGroupCalendar.PayPeriodSuffix, '') + ' ' +
ISNULL(CONVERT(NVARCHAR, PayGroupCalendar.EffectiveStart, 101), '') + ' - '
' + ISNULL(CONVERT(NVARCHAR, PayGroupCalendar.TransmitByDate, 101), '')
```

**Pay Date**

The Pay Date custom field displays the employee pay date. It uses the following expression:

```sql
ISNULL(CONVERT(VARCHAR(10), EmployeePaySummary.PayDate, 120), '')
```

**Rounded In Out Punches**

The Rounded In Out Punches custom field displays the rounded punch time sequence. It uses the following expression:

```sql
CASE WHEN EmployeePaySummary.TimeStart IS NULL AND
EmployeePaySummary.TimeEnd IS NULL THEN '' ELSE
ISNULL(FORMAT(EmployeePaySummary.TimeStart, 'hh:mm tt', 'en'), '') + ' - ' +
ISNULL(FORMAT(EmployeePaySummary.TimeEnd, 'hh:mm tt', 'en'), '') END
```

**Employee Comments**
The **Employee Comments** custom field displays the employee's punch comment. It uses the following expression:

```sql
CASE WHEN EmployeePaySummary.PunchId IS NOT NULL THEN
    ISNULL(EmployeePunch.EmployeeComment, '')
WHEN EmployeePaySummary.EmployeePayAdjustId IS NOT NULL THEN
    ISNULL(EmployeePayAdjust.EmployeeComment, '')
END
```

**Manager Comments**

The **Manager Comments** custom field displays the manager's punch comment. It uses the following expression:

```sql
CASE WHEN EmployeePaySummary.PunchId IS NOT NULL THEN
    ISNULL(EmployeePunch.ManagerComment, '')
WHEN EmployeePaySummary.EmployeePayAdjustId IS NOT NULL THEN
    ISNULL(EmployeePayAdjust.ManagerComment, '')
END
```

**Filters**

The template includes the following filters:
**Pay Summary**

The Pay Summary report uses the Pay Summary topic to display pay data for employees, such as how much employees earned and the pay category associated with the record.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Pay Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Filters**

- **Effective Start**
- **Effective End**
- **Department**
- **Location**
- **Position Name**
- **Employee Name**
- **Manager Display Name**
- **Pay Category**
- **Pay Code**
- **Pay Type Name**
- **Employment Status Group Name**
- **Pay Group Name**
- **Job**
<table>
<thead>
<tr>
<th>Job</th>
<th>Actual In</th>
<th>Actual Out</th>
<th>Authorized Manager</th>
<th>Authorized Employee</th>
<th>Pay Code</th>
<th>Pay Category</th>
<th>Normal</th>
<th>Other</th>
<th>Pay Amount</th>
</tr>
</thead>
</table>

**Custom Fields**

**Actual In**
The **Actual In** custom field displays the start time of the pay summary report. It uses the following expression:

```
Cast(EmployeePaySummary.TimeStart as Time)
```

**Actual Out**
The **Actual Out** custom field displays the end time of the pay summary report. It uses the following expression:

```
Cast(EmployeePaySummary.TimeEnd as Time)
```

**Authorized Manager**
The **Authorized Manager** custom field indicates if manager authorized the record. It uses the following expression:

```
CASE WHEN EmployeePunch.ManagerAuthorized=1 THEN 'Yes' ELSE 'No' END
```

**Authorized Employee**
The **Authorized Employee** custom field indicates if the employee authorized the record. It uses the following expression:

```
CASE WHEN EmployeePunch.EmployeeAuthorized=1 THEN 'Yes' ELSE 'No' END
```

**Normal**
The **Normal** custom field displays pay summary hours where the **Premium** checkbox is not checked. It uses the following expression:

```
CASE WHEN EmployeePaySummary.IsPremium=0 THEN CAST(EmployeePaySummary.NetHours as decimal(38,3)) WHEN EmployeePaySummary.IsPremium=1 THEN 0.0 END
```
**Other**

The **Other** custom field displays pay summary hours where the **Premium** checkbox is checked. It uses the following expression:

```
CASE WHEN EmployeePaySummary.IsPremium=1 THEN 
      CAST(EmployeePaySummary.NetHours as decimal(38,3)) 
WHEN EmployeePaySummary.IsPremium=0 THEN 0.0 END
```

**Filters**

The template includes the following filters:

**Filters**

- Effective Start
- Effective End
- Department
- Location
- Position Name
- Employee Name
- Manager Display Name
- Pay Code
- Pay Type Name
- Employment Status Group Name
- Pay Category

**Pay Summary by Department and Employee**

The **Pay Summary by Department and Employee** report is a variation of the **Pay Summary** report. This variation uses the **Pay Summary** topic to display pay data for employees, such as how much employees earned, overtime hours, and other pay categories. Information is organized by department, location, and then by employee. Managers and administrators can use this report to validate and audit employees’ pay and time for each department and each employee.
Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Pay Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule In</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule Out</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual In</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual Out</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Category</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule Hours</td>
<td></td>
<td>Column total: Sum</td>
<td></td>
</tr>
<tr>
<td>Actual Hours</td>
<td></td>
<td>Column total: Sum</td>
<td></td>
</tr>
<tr>
<td>Pay Amount</td>
<td></td>
<td>Column total: Sum</td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Actual In

The Actual In custom field displays the start time of the pay summary report. It uses the following expression:

\[
\text{Cast(EmployeePaySummary.TimeStart as Time)}
\]

Actual Out

The Actual Out custom field displays the end time of the pay summary report. It uses the following expression:

\[
\text{Cast(EmployeePaySummary.TimeEnd as Time)}
\]

Filters

The template includes the following filters:
The Pay Summary by Department and Pay Date report is a variation of the Pay Summary report. This variation uses the Pay Summary topic to display pay data for employees, such as how much employees earned and the pay category associated with the earnings. Information is organized by the employees’ assigned department, location, and then by pay date.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Pay Date</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td>Schedule In</td>
<td></td>
<td>Schedule Out</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>----------</td>
<td>--------------</td>
</tr>
</tbody>
</table>

**Custom Fields**

**Actual In**

The **Actual In** custom field displays the start time of the pay summary report. It uses the following expression:

`Cast(EmployeePaySummary.TimeStart as Time)`

**Actual Out**

The **Actual Out** custom field displays the end time of the pay summary report. It uses the following expression:

`Cast(EmployeePaySummary.TimeEnd as Time)`

**Filters**

The template includes the following filters:
The Pay Summary by Job and Employee report is a variation of the Pay Summary report. This variation uses the Pay Summary topic to display pay data for employees, such as how much employees earned and the pay categories associated with each record. Information is organized by assigned job, location, and then by employee. Managers and administrators can use this report to validate and audit employees’ pay and time for each job and each employee.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Pay Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-----------</td>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>Schedule In</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule Out</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual In</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual Out</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Category</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scheduled Hours</td>
<td>Column total: Sum</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual Hours</td>
<td>Column total: Sum</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Amount</td>
<td>Column total: Sum</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Actual In**

The **Actual In** custom field displays the start time of the pay summary report. It uses the following expression:

```sql
Cast(EmployeePaySummary.TimeStart as Time)
```

**Actual Out**

The **Actual Out** custom field displays the end time of the pay summary report. It uses the following expression:

```sql
Cast(EmployeePaySummary.TimeEnd as Time)
```

**Filters**

The template includes the following filters:
Pay Summary by Job and Pay Date

The Pay Summary by Job and Pay Date report is a variation of the Pay Summary report. This variation uses the Pay Summary topic to display pay data for employees, such as how much employees earned and the pay category associated with the record. Information is organized by job, location, and then by pay date. Managers and administrators can use this report to validate and audit employees' pay and time for each job and pay date.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Pay Date</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>Schedule In</td>
<td>Schedule Out</td>
<td>Actual In</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
<td>--------------</td>
<td>-----------</td>
</tr>
</tbody>
</table>

**Custom Fields**

**Actual In**

The **Actual In** custom field displays the start time of the pay summary report. It uses the following expression:

```
Cast(EmployeePaySummary.TimeStart as Time)
```

**Actual Out**

The **Actual Out** custom field displays the end time of the pay summary report. It uses the following expression:

```
Cast(EmployeePaySummary.TimeEnd as Time)
```

**Filters**

The template includes the following filters:
The Pay Summary by Location and Employee report is a variation of the Pay Summary report. This variation uses the Pay Summary topic to display pay data for employees, such as how much employees earned, overtime hours, and other pay categories. Information is organized by the employees’ assigned location, and then by employee. Administrators and managers can use this report to validate and audit employees’ pay and time for each location and employee.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Pay Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Scheduled In
Scheduled Out
Actual In
Actual Out
Pay Code
Pay Category
Normal
Other
Pay Amount

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduled In</td>
<td></td>
</tr>
<tr>
<td>Scheduled Out</td>
<td></td>
</tr>
<tr>
<td>Actual In</td>
<td></td>
</tr>
<tr>
<td>Actual Out</td>
<td></td>
</tr>
<tr>
<td>Pay Code</td>
<td></td>
</tr>
<tr>
<td>Pay Category</td>
<td></td>
</tr>
<tr>
<td>Normal</td>
<td>Column total: Sum</td>
</tr>
<tr>
<td>Other</td>
<td>Column total: Sum</td>
</tr>
<tr>
<td>Pay Amount</td>
<td>Column total: Sum</td>
</tr>
</tbody>
</table>

**Custom Fields**

**Actual In**

The **Actual In** custom field displays the start time of the pay summary report. It uses the following expression:

```sql
Cast(EmployeePaySummary.TimeStart as Time)
```

**Actual Out**

The **Actual Out** custom field displays the end time of the pay summary report. It uses the following expression:

```sql
Cast(EmployeePaySummary.TimeEnd as Time)
```

**Normal**

The **Normal** custom field displays the pay summary hours where the **Premium** checkbox is not selected. It uses the following expression:

```sql
CASE WHEN EmployeePaySummary.IsPremium=0 THEN
CAST(EmployeePaySummary.NetHours as decimal(38,3)) WHEN
EmployeePaySummary.IsPremium=1 THEN 0.0 END
```

**Other**

The **Other** custom field displays the pay summary hours where the **Premium** checkbox is selected. It uses the following expression:

```sql
CASE WHEN EmployeePaySummary.IsPremium=1 THEN
CAST(EmployeePaySummary.NetHours as decimal(38,3)) WHEN
EmployeePaySummary.IsPremium=0 THEN 0.0 END
```

**Filters**

The template includes the following filters:
Pay Summary by Location and Pay Date

The Pay Summary by Location and Pay Date report is a variation of the Pay Summary report. This variation uses the Pay Summary topic to display pay data for employees, such as how much employees earned and the pay category associated with the record. Information is organized by location and then by pay date. Managers and administrators can use this report to validate and audit employees’ pay and time for each location and pay date.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Pay Date</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Schedule In |  
Schedule Out |  
Actual In |  
Actual Out |  
Pay Code |  
Pay Category |  
Scheduled Hours |  
Actual Hours | Column total: Sum |  
Pay Amount | Column total: Sum |  

Custom Fields

**Actual In**

The **Actual In** custom field displays the start time of the pay summary report. It uses the following expression:

```
Cast(EmployeePaySummary.TimeStart as Time)
```

**Actual Out**

The **Actual Out** custom field displays the end time of the pay summary report. It uses the following expression:

```
Cast(EmployeePaySummary.TimeEnd as Time)
```

**Actual Hours**

The **Actual Hours** custom field displays the pay summary hours where the Premium checkbox is not selected. It uses the following expression:

```
CASE WHEN EmployeePaySummary.IsPremium=0 THEN CAST(EmployeePaySummary.NetHours as decimal(38,3)) WHEN EmployeePaySummary.IsPremium=1 THEN 0.0 END
```

**Filters**

The template includes the following filters:
Pay Summary by Manager and Employee

The Pay Summary by Manager and Employee report is a variation of the Pay Summary report. This variation uses the Pay Summary topic to display pay data for employees, such as how much employees earned and the pay category associated with each record. Information is organized by assigned manager, location, and then by employee. Managers and administrators can use this template to validate and audit employees’ pay and time for each manager.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Pay Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>Ascending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scheduled In</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule Out</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual In</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual Out</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Category</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule Hours</td>
<td>Column total: Sum</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual Hours</td>
<td>Column total: Sum</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Amount</td>
<td>Column total: Sum</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Actual In**

The **Actual In** custom field displays the start time of the pay summary report. It uses the following expression:

```
Cast(EmployeePaySummary.TimeStart as Time)
```

**Actual Out**

The **Actual Out** custom field displays the end time of the pay summary report. It uses the following expression:

```
Cast(EmployeePaySummary.TimeEnd as Time)
```

**Filters**

The template includes the following filters:
Pay Summary by Manager and Pay Date

The Pay Summary by Manager and Pay Date report is a variation of the Pay Summary report. This variation uses the Pay Summary topic to display pay data for employees, such as how much employees earned and the pay category associated with each record. Information is organized by the employees’ assigned manager. Managers and administrators can use this report to validate and audit employees’ pay and time for each manager’s assigned employees and for each pay date.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Pay Date</td>
<td>Yes</td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Custom Fields

**Actual In**

The **Actual In** custom field displays the start time of the pay summary report. It uses the following expression:

```
Cast(EmployeePaySummary.TimeStart as Time)
```

**Actual Out**

The **Actual Out** custom field displays the end time of the pay summary report. It uses the following expression:

```
Cast(EmployeePaySummary.TimeEnd as Time)
```

**Filters**

The template includes the following filters:
PPACA

The reports in the Time & Attendance > PPACA category display information about hours and pay codes as they are related to the Affordable Care Act.

ACA - Average Hours

The ACA - Average Hours template uses the ACA - WFM with Pay Codes topic to display average work hours based on WFM net hours, pay codes, and measurement period start and end dates.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
</tbody>
</table>
Custom Fields

Avg Daily Hours

The **Avg Daily Hours** custom field displays the average daily hours. It uses the following expression:

\[
\text{CAST} \left( \frac{\text{SUM(EmployeePaySummaryNet.NetHours)}}{PPACACustom.DaysInMeasurementPeriod} \right) \text{ AS DECIMAL}(19, 3)
\]

Avg Weekly Hours

The **Avg Weekly Hours** custom field displays the average weekly hours. It uses the following expression:

\[
\text{CAST} \left( \frac{\text{SUM(EmployeePaySummaryNet.NetHours)}}{PPACACustom.WeeksInMeasurementPeriod} \right) \text{ AS DECIMAL}(19, 3)
\]

Avg Monthly Hours

The **Avg Monthly Hours** custom field displays the average monthly hours. It uses the following expression:

\[
\text{CAST} \left( \frac{\text{SUM(EmployeePaySummaryNet.NetHours)}}{PPACACustom.MonthsInMeasurementPeriod} \right) \text{ AS DECIMAL}(19, 3)
\]

Filters

The template includes the following filters:
The ACA - Payroll Based Journal report uses the ACA - WFM with Pay Codes topic to display employee and staffing information, such as hire date, job title code, and hours worked for job title code on date. You can use this report to support Section 6106 of the Affordable Care Act.

### Fields

This template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Termination Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Type Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work Day Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hours</td>
<td></td>
<td></td>
<td>Column total: Sum</td>
</tr>
<tr>
<td>Job Title Code</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Filters

This template includes the following filters:
Filters

- **Effective Start**: Enter the first date of records to include in the report.
- **Effective End**: Enter the last date of records to include in the report.
- **Work Day Date**: Report results include records where the **Work Day Date** is between the **Effective Start** and **End** dates that you enter.
- **Net Hours Employee Pay Summary**: Report doesn’t include records that have zero net hours.
- **Pay Code Name**: Select pay codes in the drop-down list to exclude from the report.
- **Labor Metrics Type 0 Name**: Select labor metrics names to include in the report.

You can configure the filters for this report as follows:

- **Effective Start**: Enter the first date of records to include in the report.
- **Effective End**: Enter the last date of records to include in the report.
- **Work Day Date**: Report results include records where the **Work Day Date** is between the **Effective Start** and **End** dates that you enter.
- **Net Hours Employee Pay Summary**: Report doesn’t include records that have zero net hours.
- **Pay Code Name**: Select pay codes in the drop-down list to exclude from the report.
- **Labor Metrics Type 0 Name**: Select labor metrics names to include in the report.

**Punches**

The reports in the **Time & Attendance > Punches** category display information about employee punches, including raw punch data, unauthorized records, and punch exceptions.

**Clock Punch Exception**

The Clock Punch Exception report uses the Punch Exception topic to display a summary of clock punch exceptions that occurred in a specified period.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Scheduled Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Punch Exception
Scheduled Time
Punch Time

**Custom Fields**

**Scheduled Date**

The **Scheduled Date** custom field displays the scheduled date. It uses the following expression:

\[
\text{PunchExceptionsCustom.ScheduledTime}
\]

**Scheduled Time**

The **Scheduled Time** custom field displays the scheduled time. It uses the following expression:

\[
\text{case when PunchExceptionsCustom.ScheduledTime is null then '' else replace(substring(convert(varchar,PunchExceptionsCustom.ScheduledTime,100) ,13,5),',','') + '' + right(convert(varchar,PunchExceptionsCustom.ScheduledTime,100),2) end}
\]

**Punch Time**

The **Punch Time** custom field displays the punch time. It uses the following expression:

\[
\text{case when PunchExceptionsCustom.PunchTime is null then '' else replace(substring(convert(varchar,PunchExceptionsCustom.PunchTime,100),13, 5),',','') + '' + right(convert(varchar,PunchExceptionsCustom.PunchTime,100),2) end}
\]

**Filters**

The template includes the following filters:
Clock Punch Exception by Department

The Clock Punch Exception by Department report is a variation of the Clock Punch Exception report. This variation uses the Punch Exception topic to display a summary of clock punch exceptions that have occurred in each department. Managers and administrators can use this report to validate punch exceptions in each department and see the effect that the exceptions may have on scheduling.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Scheduled Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scheduled Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Punch Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Punch Exception</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Scheduled Date

The **Scheduled Date** custom field displays the scheduled date. It uses the following expression:
Scheduled Time

The Scheduled Time custom field displays the scheduled time. It uses the following expression:

```sql
case when PunchExceptionsCustom.ScheduledTime is null then '' else replace(substring(convert(varchar,PunchExceptionsCustom.ScheduledTime,100),13,5),' ','') + ' ' + right(convert(varchar,PunchExceptionsCustom.ScheduledTime,100),2) end
```

Punch Time

The Punch Time custom field displays the punch time. It uses the following expression:

```sql
case when PunchExceptionsCustom.PunchTime is null then '' else replace(substring(convert(varchar,PunchExceptionsCustom.PunchTime,100),13,5),' ','') + ' ' + right(convert(varchar,PunchExceptionsCustom.PunchTime,100),2) end
```

Filters

The template includes the following filters:

- **Start Date**: 1/23/2017
- **End Date**: 
- **And Department**: Please select a value
- **And Location**: Select an Option...
- **And Position Name**: Please select a value
- **And Employee Display Name**: Please select a value
- **And Manager**: Please select a value

Clock Punch Exception by Exception

The Clock Punch Exception by Exception report is a variation of the Clock Punch Exception template. This variation uses the Punch Exception topic to display a list of punch exceptions that have occurred, sorted by the type of exception. Managers and administrators can use this report to validate punch exceptions and view how many exceptions of each type have occurred.

Fields

The template includes the following fields:
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Punch Exception</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Scheduled Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scheduled Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Punch Time</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Scheduled Date**

The **Scheduled Date** custom field displays the scheduled date. It uses the following expression:

\[
\text{PunchExceptionsCustom.ScheduledTime}
\]

**Scheduled Time**

The **Scheduled Time** custom field displays the scheduled time. It uses the following expression:

\[
\text{case when PunchExceptionsCustom.ScheduledTime is null then '' else replace(substring(convert(varchar,PunchExceptionsCustom.ScheduledTime,100),13,5),' ','') + ' ' + right(convert(varchar,PunchExceptionsCustom.ScheduledTime,100),2) end}
\]

**Punch Time**

The **Punch Time** custom field displays the punch time. It uses the following expression:

\[
\text{case when PunchExceptionsCustom.PunchTime is null then '' else replace(substring(convert(varchar,PunchExceptionsCustom.PunchTime,100),13,5),' ','') + ' ' + right(convert(varchar,PunchExceptionsCustom.PunchTime,100),2) end}
\]

**Filters**

This template includes the following filters:
Clock Punch Exception by Location

The Clock Punch Exception by Location report is a variation of the Clock Punch Exception report. This variation uses the Punch Exception topic to display a summary of punch exceptions that have occurred in each location. Managers and administrators can use this report to validate the clock punch exceptions in each location, and to see the effect that the exceptions might have on scheduling.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Scheduled Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scheduled Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Punch Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Punch Exception</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Scheduled Date
The **Scheduled Date** custom field displays the employee scheduled date. It uses the following expression:

```
PunchExceptionsCustom.ScheduledTime
```

### Scheduled Time

The **Scheduled Time** custom field displays the employee scheduled time. It uses the following expression:

```
case when PunchExceptionsCustom.ScheduledTime is null then '' else replace(substring(convert(varchar,PunchExceptionsCustom.ScheduledTime,100),13,5),' ','') + ' ' + right(convert(varchar,PunchExceptionsCustom.ScheduledTime,100),2) end
```

### Punch Time

The **Punch Time** custom field displays the employee punch time. It uses the following expression:

```
case when PunchExceptionsCustom.PunchTime is null then '' else replace(substring(convert(varchar,PunchExceptionsCustom.PunchTime,100),13,5),' ','') + ' ' + right(convert(varchar,PunchExceptionsCustom.PunchTime,100),2) end
```

### Filters

The template includes the following filters:

- **Start Date**
- **End Date**
- **Department**
- **Location**
- **Position Name**
- **Employee Display Name**
- **Manager**

#### Clock Punch Exception by Manager

The Clock Punch Exception by Manager report is a variation of the Clock Punch Exception template. This variation uses the Punch Exception topic to display a summary of punch exceptions that have occurred for employees under each manager. Managers and administrators can use this report to validate the clock punch exceptions for each manager's employees.
**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Name Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Scheduled Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scheduled Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Punch Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Punch Exception</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Custom Fields**

**Scheduled Date**

The **Scheduled Date** custom field displays the scheduled date. It uses the following expression:

PunchExceptionsCustom.ScheduledTime

**Scheduled Time**

The **Scheduled Time** custom field displays the scheduled time. It uses the following expression:

```
case when PunchExceptionsCustom.ScheduledTime is null then '' else 
replace(substring(convert(varchar,PunchExceptionsCustom.ScheduledTime,100) ,13,5),' ''') + ' ' +
right(convert(varchar,PunchExceptionsCustom.ScheduledTime,100),2) end
```

**Punch Time**

The **Punch Time** custom field displays the punch time. It uses the following expression:

```
case when PunchExceptionsCustom.PunchTime is null then '' else 
replace(substring(convert(varchar,PunchExceptionsCustom.PunchTime,100),13,5),' ''') + ' ' +
right(convert(varchar,PunchExceptionsCustom.PunchTime,100),2) end
```
Filters

Employee Punch

The Employee Punch report uses the Employee Punch topic to display a summary of employee punches and worked time. It includes details such as the times that employees punched in and out for work, and exceptions associated with the punches.

Fields

The Employee Punch template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Shift Date</td>
<td></td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Start Shift</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Start Meal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Meal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Meal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Meal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Meal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Meal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Meal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Meal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Meal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Meal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Shift</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Custom Fields

Shift Date

The **Shift Date** custom field displays the shift date. It uses the following expression:

```
convert(varchar(10),EmployeePunchCustom.EPShiftIn,101)
```

Start Shift

The **Start Shift** custom field displays the shift start time. It uses the following expression:

```
EmployeePunchCustom.EPShiftIn
```

Start Meal

The **Start Meal** custom field displays the start time of the first meal. It uses the following expression:

```
EmployeePunchCustom.MealIn
```

End Meal

The **End Meal** custom field displays the end time of the first meal. It uses the following expression:

```
EmployeePunchCustom.MealOut
```

Start Meal

The **Start Meal** custom field displays the start time of the second meal. It uses the following expression:

```
EmployeePunchCustom.MealIn2
```

End Meal

The **End Meal** custom field displays the end time of the second meal. It uses the following expression:

```
EmployeePunchCustom.MealOut2
```

Start Meal

The **Start Meal** custom field displays the start time of the third meal. It uses the following expression:

```
EmployeePunchCustom.MealIn3
```
End Meal

The **End Meal** custom field displays the end time of the third meal. It uses the following expression:

```
EmployeePunchCustom.MealOut3
```

Start Meal

The **Start Meal** custom field displays the start time of the fourth meal. It uses the following expression:

```
EmployeePunchCustom.MealIn4
```

End Meal

The **End Meal** custom field displays the end time of the fourth meal. It uses the following expression:

```
EmployeePunchCustom.MealOut4
```

End Shift

The **End Shift** custom field displays the shift end time. It uses the following expression:

```
EmployeePunchCustom.EPShiftOut
```

Total Hours

The **Total Hours** custom field displays the total hours worked. It uses the following expression:

```
case when EmployeePunchCustom.TotalHours is null then '' else right('00' + cast(cast(EmployeePunchCustom.TotalHours as int) as varchar),2) + ':' + right('00' + cast(cast((cast(EmployeePunchCustom.TotalHours as numeric(4,2))*60 - cast(EmployeePunchCustom.TotalHours as int)*60) as numeric(2,0)) as varchar),2) end
```

Hours Paid

The **Hours Paid** custom field displays the total hours paid. It uses the following expression:

```
case when EmployeePunchCustom.PaidHours is null then '' else right('00' + cast(cast(EmployeePunchCustom.PaidHours as int) as varchar),2) + ':' + right('00' + cast(cast((cast(EmployeePunchCustom.PaidHours as numeric(4,2))*60 - cast(EmployeePunchCustom.PaidHours as int)*60) as numeric(2,0)) as varchar),2) end
```

Filters

The template includes the following filters:
Timesheets

The Timesheets report uses the Timesheets topic to display in and out timesheet data by employee, including raw punch information, and employee and manager comments. It contains information such as net hours, raw and rounded punches, comments, and salary details.

**Note:** This report displays information for primary and non-primary work assignments. If the job worked is not the primary assignment, the Job field is blank in the report.

**Fields**

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Pay Date</td>
<td></td>
<td>Newest to Oldest</td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Original Hire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rehire Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employment Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adjusted Net Hours</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Raw Punch Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Raw Punch End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rounded Punch Start</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Custom Fields

#### Raw Punch Start

The **Raw Punch Start** custom field displays the employee punch in time, without rounding rules. It uses the following expression:

```sql
ISNULL(FORMAT(EmployeePunch.TimeStartRaw,'hh:mm:ss tt','en'), '')
```

#### Raw Punch End

The **Raw Punch End** custom field displays the employee punch out time, without rounding rules. It uses the following expression:

```sql
ISNULL(FORMAT(EmployeePunch.TimeEndRaw,'hh:mm:ss tt','en'), '')
```

### Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>And</td>
<td>Department In</td>
</tr>
<tr>
<td>And</td>
<td>Location In</td>
</tr>
<tr>
<td>And</td>
<td>Position Name In</td>
</tr>
<tr>
<td>And</td>
<td>Employee Name In</td>
</tr>
<tr>
<td>And</td>
<td>Manager Display Name In</td>
</tr>
<tr>
<td>And</td>
<td>Employment Status Group Name Not Equal</td>
</tr>
</tbody>
</table>
Unauthorized Period

The Unauthorized Period report uses the Unauthorized Period topic to display a list of employees and their pay records that haven't been authorized by a manager or by the employee. The report includes details about employees and the records, including location, group, the user who unauthorized the record, and the reasons the records were unauthorized.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Name Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Period Date</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Actual Start</td>
<td></td>
<td>Oldest to Newest</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule Start</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual End</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unauthorized By</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unauthorized Date Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Category</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule Hour(s)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual Hour(s)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Unauthorized By

The Unauthorized By custom field displays the user who unauthorized the record. It uses the following expression:

COALESCE(AppUserEmployee.DisplayName, AppUserEmployee.LoginId)

Filters

The template includes the following filters:
The Unauthorized Records report uses the Unauthorized Records topic to display employees who have pay details that have not been authorized by a manager or by the employee. It contains details about employees, jobs, punches, and authorizations.

### Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td>Yes</td>
<td>A to Z</td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td></td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Pay Date</td>
<td></td>
<td>Z to A</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual In</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual Out</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Authorized by Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Authorized by Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Category</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Normal</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Custom Fields**

**Pay Date**

The **Pay Date** custom field displays the employee pay date. It uses the following expression:

```
ISNULL(CONVERT(VARCHAR(10), EmployeePaySummary.PayDate, 120), '')
```

**Actual In**

The **Actual In** custom field displays the start time of the pay summary report. It uses the following expression:

```
Cast(EmployeePaySummary.TimeStart AS Time)
```

**Actual Out**

The **Actual Out** custom field displays the end time of the pay summary report. It uses the following expression:

```
CAST(EmployeePaySummary.TimeEnd AS TIME)
```

**Authorized by Manager**

The **Authorized by Manager** custom field indicates if the manager authorized the record. It uses the following expression:

```
CASE WHEN ISNULL(EmployeePunch.ManagerAuthorized, 0) = 0 THEN 'No' ELSE 'Yes' END
```

**Authorized by Employee**

The **Authorized by Employee** custom field indicates if the employee authorized the record. It uses the following expression:

```
CASE WHEN ISNULL(EmployeePunch.EmployeeAuthorized, 0) = 0 THEN 'No' ELSE 'Yes' END
```

**Normal**

The **Normal** custom field displays the pay summary hours where the **Premium** checkbox is not selected. It uses the following expression:

```
CASE WHEN EmployeePaySummary.IsPremium = 0 THEN EmployeePaySummary.NetHours ELSE 0 END
```

**Other**

The **Other** custom field displays the pay summary hours where the **Premium** checkbox is selected. It uses the following expression:
CASE WHEN EmployeePaySummary.IsPremium = 1 THEN EmployeePaySummary.NetHours ELSE 0 END

### Filters

The template includes the following filters:

<table>
<thead>
<tr>
<th>Filter</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Start</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective End</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>In</td>
<td>Please select a value</td>
</tr>
<tr>
<td>Location</td>
<td>In</td>
<td>Select an Option...</td>
</tr>
<tr>
<td>Position Name</td>
<td>In</td>
<td>Please select a value</td>
</tr>
<tr>
<td>Employee Name</td>
<td>In</td>
<td>Please select a value</td>
</tr>
<tr>
<td>Manager Display Name</td>
<td>In</td>
<td>Please select a value</td>
</tr>
<tr>
<td>Pay Category</td>
<td>In</td>
<td>Please select a value</td>
</tr>
<tr>
<td>Pay Code</td>
<td>In</td>
<td>Please select a value</td>
</tr>
<tr>
<td>Pay Type Name</td>
<td>In</td>
<td>Please select a value</td>
</tr>
<tr>
<td>Employment Status Group Name</td>
<td>In</td>
<td>Please select a value</td>
</tr>
<tr>
<td>Pay Group Name</td>
<td>In</td>
<td>Please select a value</td>
</tr>
<tr>
<td>Job</td>
<td>In</td>
<td>Please select a value</td>
</tr>
<tr>
<td>Authorized by Manager</td>
<td>Not Equal</td>
<td>Yes</td>
</tr>
<tr>
<td>Authorized by Employee</td>
<td>Not Equal</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### Time Away

The reports in the Time & Attendance > Time Away category display information about employee time away from work. The data for these reports comes from the Time Away List and Timesheets features.
Bradford Factor

The Bradford Factor report uses the Employee Balance Transaction topic to display the Bradford Factor for employees, using their number of sick days and number of instances of sick leave in the calculation. HR or Payroll administrators in the UK can use this report to view Bradford Factor information for employees.

Fields

The template includes the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Group by</th>
<th>Sort Order</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>Yes</td>
<td>Ascending</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sick Days</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instances</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bradford Factor</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields

Sick Days

The **Sick Days** custom field displays the count of all days included in the **Balance Name** filter. This field only includes days that have been requested. Partial days and full days are counted as one day. It uses the following expression:

```
Count(distinct (CASE WHEN EmployeeBalanceTransaction.Delta < 0 and EmployeeBalanceTransaction.TAFWID is not null THEN EmployeeBalanceTransaction.BalanceDate ELSE null END))
```

Filters

The template includes the following filters:
Filters

<table>
<thead>
<tr>
<th>Filter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td></td>
</tr>
<tr>
<td>Primary Work Assignment</td>
<td>Equal</td>
</tr>
<tr>
<td>Bradford Factor</td>
<td>Greater Than</td>
</tr>
<tr>
<td>Location Name</td>
<td>In</td>
</tr>
<tr>
<td>Department</td>
<td>In</td>
</tr>
<tr>
<td>Balance Name</td>
<td>In</td>
</tr>
<tr>
<td>Employee Display Name</td>
<td>In</td>
</tr>
<tr>
<td>TAFW Status Name</td>
<td>In</td>
</tr>
<tr>
<td>Approved</td>
<td></td>
</tr>
</tbody>
</table>