

CODEKS TA Kit - Time Attendance Reports

Description of different reports in the Time Attendance editor



Description of different reports in the Time Attendance editor

2023 in Naklo

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1. Time attendance Reports

In the upper toolbar of the *Time attendance* editor, you will find several icons for creating different reports and data exports.

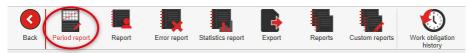


- **1.** First, select the users you wish to make a report about from the *List of users*. To select an individual user just click on him in the *List of users* on the left. To select multiple users hold down the SHIFT or CTRL key and click the desired users.
- 2. Click on the icon of the desired report and set the additional settings.
- **3.** You can save the newly generated report or view it with a suitable program.

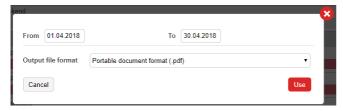
The individual types of reports are described in more detail in the following chapters.



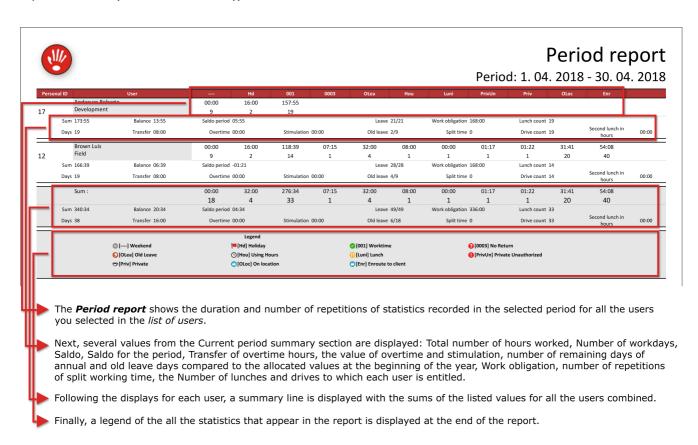
1.1. Period Report



The **Period report** displays the recorded hours and the number of iterations of statistics for all users you have selected in the *list of users* .

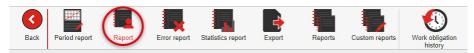


Before generating the report you can specify the exact period for display and select the output file format (Portable document format (.pdf), Excel Worksheet (.xls), Excel Worksheet (.xlsx), Open document spreadsheet (.ods), Comma separated values (text document - .cvs)).

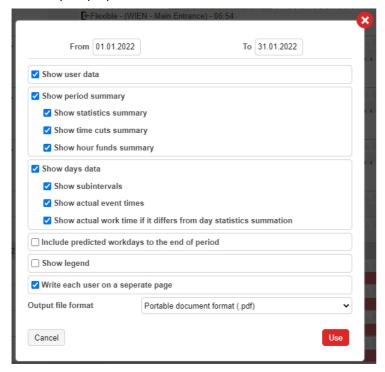




1.2. Report



Use *Report* when you want to display a detailed list of entries and exits for selected users of the period currently displayed in the *Time attendance* editor.



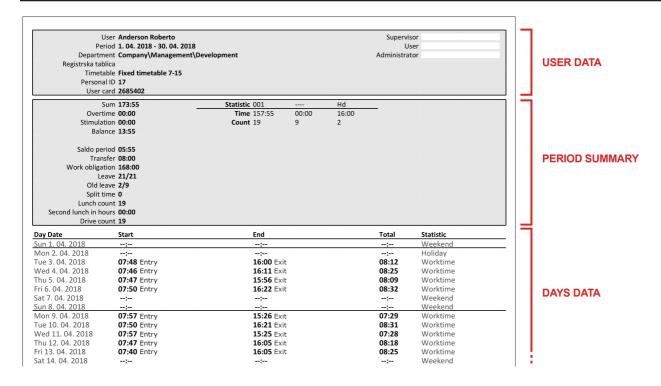
Before generating the report you can specify the exact period for display and select the output file format (Portable document format (.pdf), Excel Worksheet (.xls), Excel Worksheet (.xlsx), Open document spreadsheet (.ods), Comma separated values (text document - .cvs)).

You can also set these additional settings:

| Settings | Description |
|-------------------------|---|
| Show user data | If this setting is enabled the users' data will be written on the report. |
| Show period summary | If this setting is enabled the period summary data (the statistic, time cuts, and/or hour funds summaries) will be displayed on the report. |
| Show statistics summary | If this setting is enabled the report for each user will also contain the sums of all the statistics registered in the displayed period. |
| Show time cuts summary | If this setting is enabled the report for each user will also contain the sums of all time cuts registered in the displayed period. |
| Show hour funds summary | If this setting is enabled the report for each user will also contain the sums of hour funds registered in the displayed period. |
| Show days data | If this setting is enabled detailed daily data will be displayed on the report (the subintervals, actual events, and/or the actual work time). |
| Show subintervals | If this setting is enabled the report will also contain the recorded daily intervals within the umbrella intervals. |
| Show actual events | If this setting is enabled the actual times (as well as the recorded rounded-up times) of the time attendance events will be displayed on the report (the actual events will be marked with an asterisk *). |

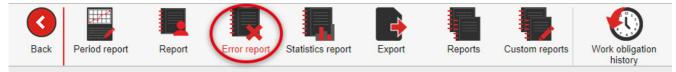


| Settings | Description |
|---|--|
| Show actual work time if it differs from day statistics summation | If this setting is enabled, the <i>Total</i> column of the report will display all the user's recorded hours, and next to these values the hours which actually count for working hours will be displayed in parentheses. (This setting is used in cases where the user also records working hours, which are not counted in (obligatory) working hours, but in different statistics (or fund).) |
| Include predicted workdays to the end of period | If this setting is enabled the report for each user will also contain all future days up to the end of the displayed (payroll) period. |
| Show legend | If this setting is enabled the report will also contain the legend of the displayed statistics. |
| Write each user on a separate page | If this setting is enabled every user will be displayed on a separate page in the report. |





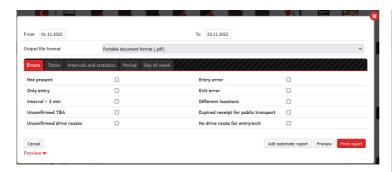
1.3. Error Report

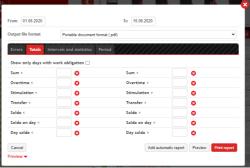


The *Error report* offers different filtering options that enable you to display customized reports of various exceptions and deviations in the time attendance registration. Pay close attention to which settings you have set in each tab because the settings in ALL tabs are taken into account when printing the report!

The *Error report* also allows you to *preview the errors* found according to the set parameters. Errors shown in the preview are hyperlinks, and clicking on them opens a new tab, with the *Time* attendance editor, with the marked user and the day on which the error was found. This enables faster search and correction of errors in the employees' time registration.

Before generating the report you can specify the exact period for display and select the output file format (Portable document format (.pdf), Excel Worksheet (.xls), Excel Worksheet (.xlsx), Open document spreadsheet (.ods), Comma separated values (text document - .cvs))

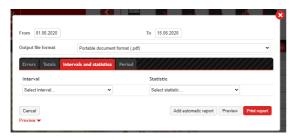


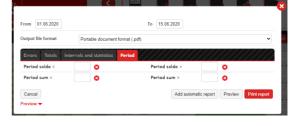


| Errors | Description |
|--|---|
| Not present | Displays the days when the user did not register his work (was not present at work). |
| Only entry | Displays the days when the user did not register an Exit (e.g. they forgot to register going home from work). |
| Interval < 3 min | Displays intervals which lasted less than 3 minutes. |
| Unconfirmed T&A | Displays all the payroll periods which have not yet been confirmed by heads of departments. (You can read more about <i>Worktime approval</i> settings in chapter Preferences - Time attendance in main Codeks manual.) |
| Unconfirmed drive routes | Displays drive routes which were submitted by the user but had not yet been confirmed by the administrator. |
| Entry error | Displays the days when an error was recorded when the user registered an Entry event. |
| Exit error | Displays the days when an error was recorded when the user registered an Exit event. |
| Different locations | Displays the days when the user registered time attendance events at different locations. |
| * Expired receipt for public transport | Displays users who do not have a valid public transport document. * The setting is displayed only when using the Codeks Distance Table add-on. |
| No drive route for entry / exit | Displays user's entry or exit events at the location which is not defined in the table of routes. |

| Totals | Description |
|---|--|
| Show only days with work obligation | If this setting is enabled, the report will only be set for days when the user's work obligation is greater than 0 (e.g. weekends and holidays will remain unchanged). |
| Sum | This setting limits the report display according to the total number of recorded work hours in the day. |
| Overtime | This setting limits the report display according to the number of overtime hours. |
| Stimulation | This setting limits the report display according to the number of stimulation hours. |
| Transfer | This setting limits the report display according to the number of transfer hours. |
| Saldo | This setting limits the report display according to the value of <i>Saldo</i> . |
| Saldo on day | This setting limits the report display according to the value of <i>Saldo on day</i> (the value of the user's total saldo on a particular day). |
| Day saldo | This setting limits the report display according to the value of <i>Day saldo</i> (the number of hours the user has added to his total saldo on a particular day). |

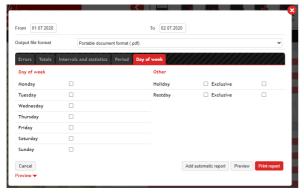






| Intervals and statistics | Description |
|--------------------------|--|
| Interval | Displays the days when a user registered a specific interval (or several intervals). |
| Statistics | Displays the days when a user registered a specific statistic (or several statistics). |

| Period | Description |
|--------------|--|
| Period saldo | This setting limits the report display according to the value of <i>Period saldo</i> . |
| Period sum | This setting limits the report display according to the value of <i>Period sum</i> . |



| Day of week | Description |
|--|---|
| Monday Tuesday Wednesday Thursday Friday Saturday Sunday | You can limit the error search to specific day of the week. |
| Holiday Restday | You can limit the error search to only include holidays or restdays. The additional option <i>Exlusive</i> enables you to search for special combinations of days when a specific day of the week was also a holiday or restday. |

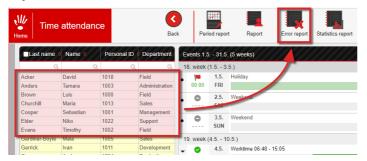
Clicking the **Print report** button will generate a report in the selected file format. Example of a PDF report:



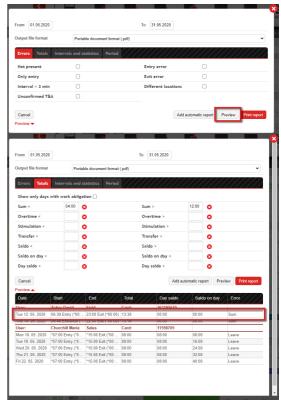


1.3.1. The display and use of the Error overview

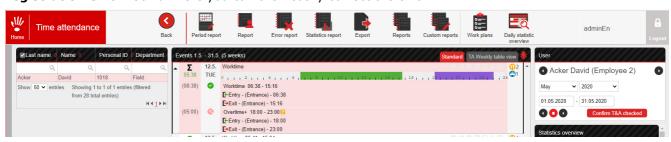
1. First, in the list of users, mark all the users you want to scan with an error report and then click the *Error* report icon.



- **2.** In the new pop-up window, first, select the period for display.
- **3.** Then select the desired parameters depending on the registration errors you want to find. Then click the **Preview** button instead of the **Print** report button.
- **4.** In the lower part of the pop-up window, a preview of all errors found according to the selected parameters, in the period currently displayed in the *Time attendance* editor, will be displayed.



5. Double-clicking on an individual record will open a new tab displaying the location of the registration error found. Here you can then easily correct the error.



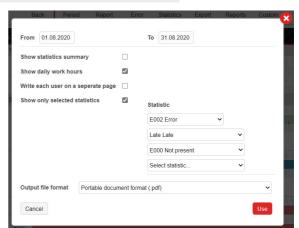


1.4. Statistic Report



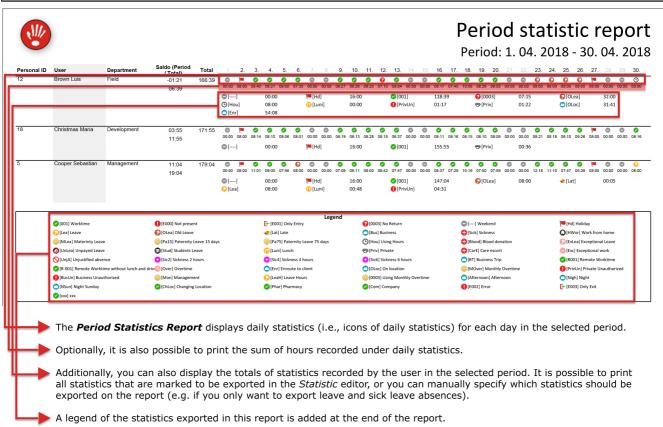
The **Statistics report** graphically displays the recorded daily statistics for the selected period. The report contains a practical graphic visualization of the users' time registration, with which you can easily check, for example, if several users have leave on the same date.

Before generating the report you can specify the exact period for display and select the output file format (Portable document format (.pdf), Excel Worksheet (.xls), Excel Worksheet (.xlsx), Open document spreadsheet (.ods), Comma separated values (text document - .cvs)).



You can also set these additional settings:

| Settings | Description |
|------------------------------------|--|
| Show statistics summary | If this setting is enabled the report for each user will also contain the sums of all the statistics registered in the displayed period. |
| Show day statistic sum | If you enable the setting, the report will show the sum of work hours the user has clocked. The sum contains the values of all daily statistics that count work hours. |
| Write each user on a separate page | If you enable this setting, each user will be written on a separate page in the report. |
| Show only selected statistics | This setting enables you to only include the selected statistics in the <i>statistic report</i> , that you have selected in the additional fields below which have been displayed when you enabled this setting. |





1.5. Export



Export enables you to export the users' data into different types of reports that can also be imported and processed by a third-party program or application (for example, a payroll program).

The following chapters describe the individual types of exports in more detail.

1.5.1. Export

The **Export** exports the same data as the **Period** report of in .csv format.

```
GeneratedExports_StatisticsExport.csv - Beležnica

Datoteka Urejanje Oblika Pogled Pomoč

3;Cloud Rosie;3;;;3;;2;E000;Not present;0:00;103;Cloud Rosie;3;;;3;;5;----;weekend;0:00;00
```

1.5.2. Detail XML and Detail XML work prediction

The **Detail XML** creates an XML report of the current status of presence (the number of hours) for selected users, and the **Detail XML work prediction** creates an XML report of predicted presence (number of hours) for selected users. The *work prediction* is based on the user's work obligation. In the xml badge <HOURS>, the presence of the employee is predicted according to his work obligation. This prediction applies to the coming days of the current month. At the end of the month, it is necessary to check the data and adjust them in case of discrepancies.

The difference between the **Detail XML** (first image below) and **Detail XML work prediction** (second image below) **in the same month, for the same user**:

```
| CREFREY > 0.1505088.105739.031200033 | CREFREY > CREFREY > 0.1505088105732031200033 | CREFREY > CREFREY > 0.150508.105732031200033 | CREFREY > CREFREY > CREFREY > 0.150508.105732031200033 | CREFREY > CREFREY > CREFREY > 0.150508.105732031200033 | CREFREY > CREFREY > 0.150508.105732031200033 | CREFREY > CREFREY > 0.150508.105732031200033 | CREFREY > 0.150508.105732031200034 | CREFREY > CRE
```

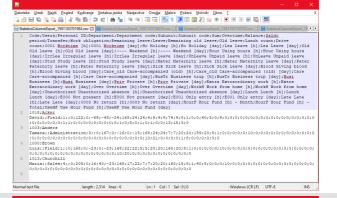


1.5.3. Statistics Columns Export

The **Statistics Columns Export** offers several different forms of displaying statistics by columns in .csv text file format:



The **Statistics Columns Export** displays the values of statistics by columns in hours and days. The export is created for those statistics that have the **Export** setting enabled in the **Statistics** editor.

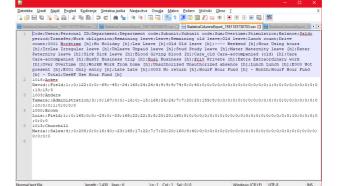


The Statistics Columns Export with stimulation

displays the values of statistics by columns in hours and days, and also displays the value of stimulation. The export is created for those statistics that have the *Export* setting enabled in the *Statistics* editor.

Semental Annual Section (1988) and the section of t

The **Statistics Columns Export by hours** displays the values of statistics by columns in hours. The export is created for those statistics that have the **Export** setting enabled in the **Statistics** editor.





The Statistics Columns Export by hours and minutes displays the values of statistics by columns in hours and minutes. The export is created for those statistics that have the *Export* setting enabled in the *Statistics* editor. text file length: 1.995 lines: 6 Ln:1 Col:1 Sel:0|0 Windows (CR LF) UTF-8 The Compact statistics columns export by hours teka <u>Uredi Najdi Pogled Kodiranje Sintaksa jezika Nastaritve Orodja Makro Poženi Ytičniki Okno ?</u> 聲 🔛 😘 😘 😘 😘 🎉 🐘 🗊 🚅 læb 🍇 🕸 🖎 🖎 🔯 🚾 🚾 🚾 💯 💯 💯 💯 💯 🚳 🍎 🕮 🕦 🕬 🕬 🥸 🎉 displays the values of statistics by columns in hours. The export is created for those statistics that have the **Export** setting enabled in the Statistics editor. The compact export of statistics by hours does not export all the user data (code, personal number, department, etc.), but only the user's name and statistics values in hours. The **Statistics Columns Export by days** displays the values of statistics by columns in days. The export is created for those statistics that have the **Export** setting enabled in the Statistics editor.



1.5.4. Worktime

The **Worktime** export displays data on registered intervals for each individual user in the selected period, and can be printed in any format.

You can also enable some additional settings when exporting:



| Settings | Description |
|-------------------------|--|
| Show subintervals | If this setting is enabled the report will also contain the recorded daily intervals within the umbrella intervals. |
| Show actual event times | If this setting is enabled the actual times (as well as the recorded rounded-up times) of the time attendance events will be displayed on the report (the actual events will be marked with an asterisk *). |
| Show daily summaries | If this setting is enabled, the report for each user will also include the totals of all statistics that they registered in the slected period. |
| Output file format | Before generating the report you can specify the exact period for display and select the output file format (Portable document format (.pdf), Excel Worksheet (.xls), Excel Worksheet (.xlsx), Open document spreadsheet (.ods), Comma separated values (text documentcvs)). |

An example of the report in PDF format:

| | | | | Pe | riod repor | t | | | | | |
|-----------------------|----------------------|-----|-------------|------------|------------|--------------|--------------|--------------|-------|------------|------------|
| Personal IC Export ID | External IC Employee | Day | Date | Day of wee | Start | Start descr | Start locati | Start locati | End | End descri | End locati |
| 1018 | Acker Davi | 1 | 1. 05. 2020 | Fri | | | | 0 | | | |
| 1018 | Acker Davi | 2 | 2. 05. 2020 | Sat | | | | 0 | | | |
| 1018 | Acker Davi | 3 | 3. 05. 2020 | Sun | | | | 0 | | | |
| 1018 | Acker Davi | 4 | 4. 05. 2020 | Mon | 06:48 | Entry | Company / | 5 | 15:05 | Exit | Company |
| 1018 | Acker Davi | 5 | 5. 05. 2020 | Tue | 06:58 | Entry | Company / | 5 | 15:20 | Exit | Company |
| 1018 | Acker Davi | 6 | 6. 05. 2020 | Wed | 07:00 | Entry | Company / | 5 | 15:02 | Exit | Company |
| 1018 | Acker Davi | 7 | 7. 05. 2020 | Thu | 07:00 | Entry | Company / | 5 | 15:14 | Exit | Company |
| 1018 | Acker Davi | 7 | 7. 05. 2020 | Thu | 12:33 | Lunch | Company / | 5 | 13:03 | | Company |
| 1018 | Acker Davi | 7 | 7. 05. 2020 | Thu | 13:03 | Lateness | Company / | 5 | 13:15 | | Company |
| 1018 | Acker Davi | 8 | 8. 05. 2020 | Fri | 07:02 | Entry | Company / | 5 | 15:10 | Exit | Company |
| 1018 | Acker Davi | 9 | 9. 05. 2020 | Sat | 10:23 | Entry | Company / | 5 | 22:58 | Exit | Company |
| 1018 | Acker Davi | 10 | 10. 05. 202 | Sun | | | | 0 | | | |
| 1018 | Acker Davi | 11 | 11. 05. 202 | Mon | 07:10 | Entry | Company / | 5 | 15:10 | Exit | Company |
| 1018 | Acker Davi | 11 | 11. 05. 202 | Mon | 12:23 | Using Hou | Company / | 5 | 15:10 | | Company |
| 1018 | Acker Davi | 12 | 12. 05. 202 | Tue | 06:38 | Entry | Company / | 5 | 15:16 | Exit | Company |
| 1018 | Acker Davi | 13 | 13. 05. 202 | Wed | 06:41 | Entry | Company / | 5 | 15:04 | Exit | Company |
| 1018 | Acker Davi | 14 | 14. 05. 202 | Thu | 06:48 | Entrance | Company / | 5 | 16:23 | Exit | Company |
| 1018 | Acker Davi | 14 | 14. 05. 202 | Thu | 10:04 | Private una | Company / | 5 | 11:23 | | Company |
| 1018 | Acker Davi | 15 | 15. 05. 202 | Fri | | | | | | | |
| 1018 | Acker Davi | 16 | 16. 05. 202 | Sat | | | | 0 | | | |
| 1018 | Acker Davi | 17 | 17. 05. 202 | Sun | | | | 0 | | | |
| 1018 | Acker Davi | 18 | 18. 05. 202 | Mon | | | | 0 | | | |
| 1018 | Acker Davi | 19 | 19. 05. 202 | Tue | | | | 0 | | | |
| 1018 | Acker Davi | 20 | 20. 05. 202 | Wed | | | | 0 | | | |
| 1018 | Acker Davi | | 21. 05. 202 | | | | | 0 | | | |
| 1018 | Acker Davi | 22 | 22. 05. 202 | Fri | | | | 0 | | | |
| 1018 | Acker Davi | 23 | 23. 05. 202 | Sat | | | | 0 | | | |
| 1018 | Acker Davi | 24 | 24. 05. 202 | Sun | | | | 0 | | | |
| 1018 | Acker Davi | 25 | 25. 05. 202 | Mon | 13:20 | Illegal entr | Company / | 5 | | | |



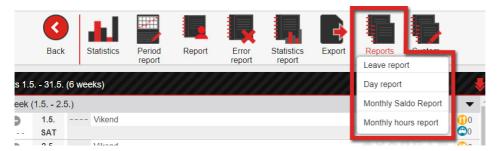
1.5.5. Largo export

The Largo export is especially adapted for further import and processing in the *Perftech.Largo* system.

You can adjust the values of the displayed statistics using the formulas in the *Largo Export* section of the *Time Registration* tab in the *Preferences* menu.



1.6. Reports



Through the Reports icon you can access special reports:

- Leave report,
- Day report,
- Monthly Saldo Report,
- Monthly hour report.



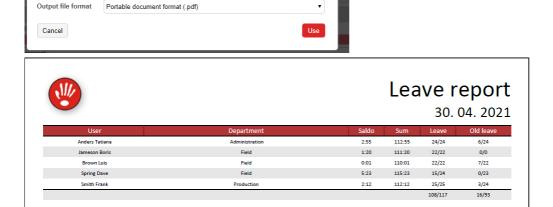
1.6.1. Leave report

The **Leave report** displays the current state of used and available leave and old leave days for all selected users.

If you are printing the *Leave report* for the current month, the report will display the status of leave days on the current day.

If you are printing the *Leave report* for any month in the past, the status of leave days on the last day of the month will be displayed. It is not possible to create a report showing the status of holidays on a particular day in the past for any month in the past.

Before generating the report you can select the output file format (Portable document format (.pdf), Excel Worksheet (.xls), Excel Worksheet (.xlsx), Open document spreadsheet (.ods), Comma separated values (text document - .cvs)).

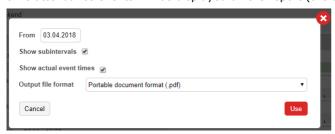


1.6.2. Day report

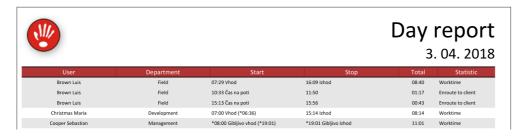
The **Day report** will display all Entry and Exit events as well as the daily statistics on a particular day for all selected users. To generate a *Day report*, first, **set the date to be displayed (From).**

If the **Show subintervals** setting is enabled the report will also contain the recorded daily intervals within the umbrella intervals.

If the **show actual event times** setting is enabled the actual times (as well as the recorded rounded-up times) of the time attendance events will be displayed on the report (the actual events will be marked with an asterisk *).



Before generating the report you can select the output file format (Portable document format (.pdf), Excel Worksheet (.xls), Excel Worksheet (.xlsx), Open document spreadsheet (.ods), Comma separated values (text document - .cvs)).

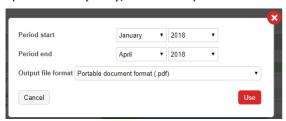


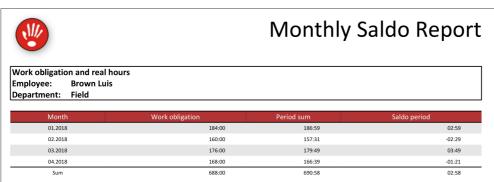


1.6.3. Monthly Saldo Report

The **Monthly Saldo Report** will display the value of *Saldo* for each month as well as the total (sum) value of the period saldo for the selected period.

Before generating the report you can specify the exact period for display and select the output file format (Portable document format (.pdf), Excel Worksheet (.xls), Excel Worksheet (.xlsx), Open document spreadsheet (.ods), Comma separated values (text document - .cvs)).



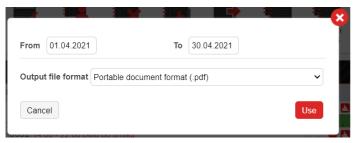


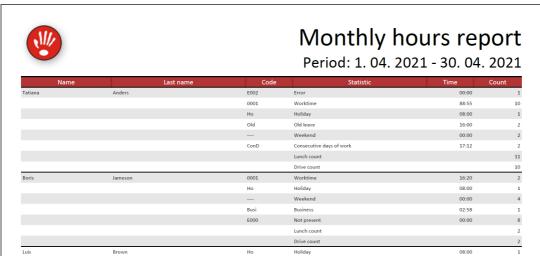


1.6.4. Monthly hours report

For each selected user displays, the report *Monthly hours report* displays all the statistics recorded in a given period, including their duration and number of repetitions, additionally it also displays the number of lunches and drives in the given period.

When generating the report, you must first specify the date, then you can also select the output file format (Portable document format (.pdf), Excel Worksheet (.xls), Excel Worksheet (.xlsx), Open document spreadsheet (.ods), Comma separated values (text document .cvs)).







1.7. Custom report

Custom reports enable you to create a completely customized output report or export data, that can be used for further data processing in third-party programs and applications.

ATTENTION!

Defining a new custom report is a very complex process that demands a detailed knowledge of the data structure within the Codeks database. In addition, you must also understand the process of report generating and the elements used in the custom report definition.

You can read more about *Custom reports* in the documentation of the main Codeks application (https://jantar.si/pdf/TAKitManual-en_V10.pdf).