

PaycoHCM Tips and Tricks: Date Ranges in Reports

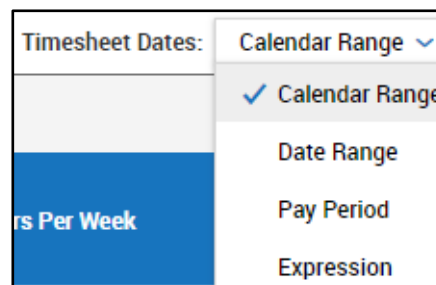
Timing is everything, and with PaycoHCM, you can find information for the exact dates that you need with just a few clicks!

The types of reports available vary depending on the PaycoHCM modules being used, but there are three main categories of reports:

- Reports based on Employee data – these reports have no date selector; they represent current employee settings.
- Reports based on Timekeeping data (TLM module) – the dates selected for these reports will return information based on the actual calendar date.
- Reports based on Payroll data (Payroll Module) – these reports will return information for **all payrolls with check dates that fall within the selected date range**.

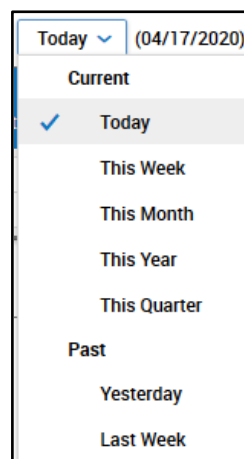
Timekeeping Reports:

When setting the dates for a report, the first step is to select the appropriate *Timesheet Dates*. This will determine the type of date that can be selected. There are four options for timekeeping reports:

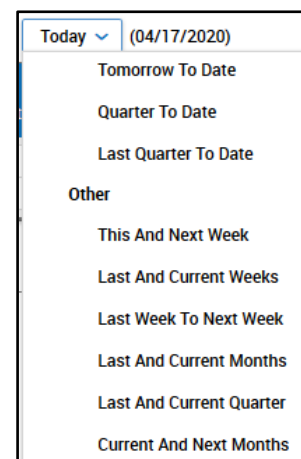


The screenshot shows a dropdown menu for 'Timesheet Dates'. The selected option is 'Calendar Range'. Other options include 'Date Range', 'Pay Period', and 'Expression'. A blue bar at the bottom of the menu indicates 'Hours Per Week'.

1. **Calendar Range** – This will allow for a quick selection of predefined calendar ranges based on days, weeks, months, quarters, or years, occurring in the present, past, or future. Additionally, YTD and other special ranges are defined.



This screenshot shows the 'Current' section of the 'Calendar Range' dropdown menu. The date is set to 'Today (04/17/2020)'. The options listed are: Today (checked), This Week, This Month, This Year, and This Quarter.



This screenshot shows the 'Past' section of the 'Calendar Range' dropdown menu. The date is set to 'Today (04/17/2020)'. The options listed are: Yesterday, Last Week, Tomorrow To Date, Quarter To Date, Last Quarter To Date, and an 'Other' section containing: This And Next Week, Last And Current Weeks, Last Week To Next Week, Last And Current Months, Last And Current Quarter, and Current And Next Months.

2. **Date Range** – This will allow a *From:* and *To:* date to be typed in or selected from a calendar.

Timesheet Dates: Date Range

From: To:

3. **Pay Period** – This option will allow for selection based on batch dates, and also requires that a pay-period *Profile* be selected. The *Current*, *Next*, or *Previous* pay period can be selected; or selecting *Date* will enable a field to type or select the associated pay date.

Timesheet Dates: Pay Period

Current Profile: Bi-Weekly

Current
 Next
 Previous
 Date

Daily Overtime Hours

04/17/2020

4. **Expression** – This option will enable *From:* and *To:* fields for which built-in functions can be selected.

Available Expressions

DATE FUNCTIONS	EXAMPLE
AddDays (date,n)	AddDays("1/1/2011",20) = 1/21/2011
AddMonths (date,n)	AddMonths("1/31/2011",1) = 2/31/2011
AddWeeks (date,n)	AddWeeks("1/1/2011",1) = 1/8/2011

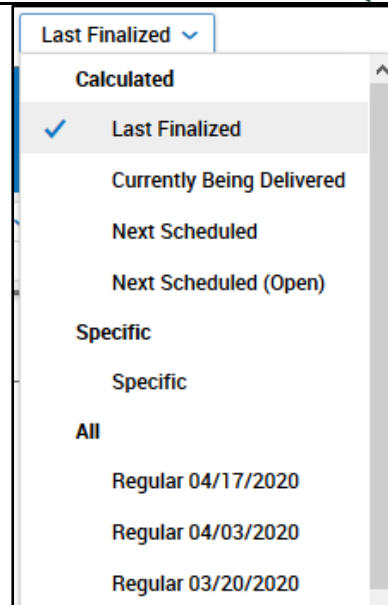
Payroll Reports

Date settings for payroll-based reports operate the same way, except that the initial selector is called *Pay Dates* rather than *Timesheet Date*, and there are two additional options:

Pay Dates: Specific Payroll

Calendar Range
 Date Range
 Pay Period
 Expression
 Specific Payroll
 Payroll Filter

1. **Specific Payroll** – This option will enable a menu from which a payroll can be selected based on a descriptor or a recent payroll date.
 - a. Selecting **Specific** from the list will open a filterable Payroll Lookup dialog, as pictured in Step 2, below.



2. **Payroll Filter** – This option will open a filterable Payroll Lookup dialog to select from.

