

# How To Guide

## Defined Reports



<b>Document Purpose</b>	<b>Step-by-Step instructions to run a report for any date range.</b>
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- Defined Reports are company level reports that can be generated on demand for any date range Weekly, Monthly, Quarterly or Annually.

From the Dashboard select the Reports Menu, then Defined Reports. The list of available reports will open. Double-click on the report to be processed or Highlight the report name and select Configure Report.

The screenshot shows the 'Reports' interface with a sidebar on the left containing 'DEFINED REPORTS', 'PUBLISHED REPORTS', and 'AD HOC REPORTS'. The main area displays a table of reports with columns for 'Report Name' and 'Report #'. The 'Payroll Register (S109)' report is highlighted, and a red box highlights the 'CONFIGURE REPORT' button next to it. The table also includes a search bar, an 'EXPORT TO EXCEL' button, and a pagination bar at the bottom showing 'Page 1 of 4' and '1 - 15 of 49 items'.

The Options Screen will open to configure the report requirements.

The screenshot shows the 'Options for Payroll Register' screen. It features a breadcrumb trail '← REPORTS LIST' and a title 'Options for Payroll Register'. Below the title are tabs for 'Payroll Filter', 'EE Filter', 'Org Filter', 'Misc Options', and 'Run Report'. A note states: 'Select the date range to use for your report. All payrolls within your range will be selected. You can fine tune your selection by checking only the payrolls you want to include.' The 'Starting Date' is set to 01/01/2019 and the 'Ending Date' is 10/09/2019. The 'Include' dropdown is set to 'All Payrolls'. Below this is a table of payroll runs with columns for 'Check Date', 'Run #', 'Processed Date', 'Status', and 'Type'. The table shows several rows of data, with the second row (09/12/2019) highlighted. The pagination bar at the bottom shows 'Page 1 of 2' and '1 - 10 of 11 items'.

You will see several tabs across the top of the grid, these tabs will assist you in configuring your report.

- **Payroll Filter** - this is where you choose the date range. In the starting date field enter the begin date then enter the end date in the ending date field (i.e. 1/1 - 12/31), select All Payrolls and select Apply. This list will only show the payrolls within the date range requested. Put a check mark in the box in front of Check Date to select all the payrolls within the date range.
- **EE Filter** - this will allow you to select which employees you want included on the report. By default, it will include all employees. If you only want 1 or 2 employees, put a check mark in front of their name and the report will only include those employees.
- **Org Filter** - this will allow you to select which departments you want included in the report. By default, it will include all departments. If you only want 1 department, put a check mark in front of the department name and the report will only include that department.
- **Misc Options** - this will allow you to select a variety of options. We generally recommend you leave all options as shown except for "Show only summary for Multiple Check Dates. If you are running this report for a date range do you want to see every check for every employee for that time frame (detail) or do you just want to see one entry with totals for the entire date range (summary).
- **Run Report** - once you have selected all your options you can Run This Report. Your report will be available in the Task Queue at the bottom left corner.

Once your report is done it will show in the Task Queue and give you the option to download as a PDF to either print or add as an email attachment.