Introduction

The purpose of this article is to review commonly built reports, and the Report Types that are best used in Report Writer. Use the instructions below to set up Report Types, which can be used as a general shell for the further customization of individual reports.

Note: “Date Range” Report Types result in multiple line items, while “Date Range Summary” Report Types result in single line items.

Employee Birthday List (As of Date or Preview by Payroll)

1. Navigate to **Reporting > Report Writer.**
2. Click **Add New**.
3. Select “Payroll Employee Summary Report” from the **Report Type** dropdown menu.
4. Enter the desired report name into the **Report Title** field.
5. Select a **Font Size** from the dropdown menu. The default is “8pt.”
6. Select a **Font Face** from the dropdown menu. The default is “Arial.”
7. Select “Portrait” or “Landscape” from the **Report Orientation** dropdown menu.
8. Select the desired **Report Group** access from the dropdown menu.
9. Enter a **Description** for internal use, if desired.
10. Click **Save**.
11. Click the **Add Columns** tab.
12. Click **Edit**.
13. Add the categories displayed below by selecting the “Employee Data” from the **Field Category** dropdown menu. You can add additional categories, if desired.
14. Click **Save**.

Added Columns

Category	Column
Employee Data	Employee Number
Employee Data	Employee Name
Employee Data	Birth Date
Employee Data	Status

Workers Comp (Date Range)

1. Navigate to **Reporting > Report Writer.**
2. Click **Add New**.
3. Select “Date Range Employee Summary” from the **Report Type** dropdown menu.
4. Enter the desired report name into the **Report Title** field.
5. Select a **Font Size** from the dropdown menu. The default is “8pt.”
6. Select a **Font Face** from the dropdown menu. The default is “Arial.”
7. Select “Portrait” or “Landscape” from the **Report Orientation** dropdown menu.
8. Select the desired **Report Group** access from the dropdown menu.
9. Enter a **Description** for internal use, if desired.
10. Click **Save**.

11. Click the **Add Columns** tab.
12. Click **Edit**.
13. Add the categories displayed below from the **Field Category** dropdown menu. Add additional categories, if desired.
14. Click **Save**.

Added Columns

Category	Column
Employee Org & Labor	Division Code
Employee Org & Labor	Department Code
Employee Data	Employee Number
Employee Data	Employee Name
Check Accumulations	Gross Wages
Employee Job	Job Title
Employee Org & Labor	Department Title
Employee Job	Workers Comp Classification
Employee Job	Workers Comp Description

Note: For this Report Type, it is recommended that you add a Report Filter like the one shown below. This allows the report to pull only the employees that have income for that date range.

Work Location (As of Date or Preview by Payroll Run)

1. Navigate to **Reporting > Report Writer.**
2. Click **Add New**.
3. Select "Payroll Employee Summary Report" from the **Report Type** dropdown menu.
4. Enter the desired report name into the **Report Title** field.
5. Select a **Font Size** from the dropdown menu. The default is "8pt."
6. Select a **Font Face** from the dropdown menu. The default is "Arial."
7. Select "Portrait" or "Landscape" from the **Report Orientation** dropdown menu.
8. Select the desired **Report Group** access from the dropdown menu.
9. Enter a **Description** for internal use, if desired.
10. Click **Save**.
11. Click the **Add Columns** tab.
12. Click **Edit**.

13. Add the categories displayed below from the **Field Category** dropdown menu. Add additional categories, if desired.
14. Click **Save**.

Added Columns

Category	Column
Employee Data	Employee Number
Employee Data	Employee Name
Employee Org & Labor	Department Code
Employee Org & Labor	Department Title
Employee Job	Job Title
Employee Tax Information	Work Location Description
Employee Job	Workers Comp Code
Employee Job	Workers Comp Description

401K Census (As of Date or Preview by Payroll)

1. Navigate to **Reporting > Report Writer.**
2. Click **Add New**.
3. Select "Payroll Employee Summary Report" from the **Report Type** dropdown menu.
4. Enter the desired report name into the **Report Title** field.
5. Select a **Font Size** from the dropdown menu. The default is "8pt."
6. Select a **Font Face** from the dropdown menu. The default is "Arial."
7. Select "Portrait" or "Landscape" from the **Report Orientation** dropdown menu.
8. Select the desired **Report Group** access from the dropdown menu.
9. Enter a **Description** for internal use, if desired.
10. Click **Save**.
11. Click the **Add Columns** tab.
12. Click **Edit**.
13. Add the categories displayed below from the **Field Category** dropdown menu. Add additional categories, if desired.
14. Click **Save**.

Added Columns

Category	Column
Employee Data	Emp No.
Employee Data	Last Name
Employee Data	First Name
Employee Data	Date of Hire
Deduction Accumulations	Current Dollars 401K
Deduction Accumulations	Current Dollars 401(k) Roth
Deduction Accumulations	YTD Dollars 401K
Deduction Accumulations	YTD Dollars 401(k) Roth
Check Accumulations	YTD Gross Wages

Note: For this Report Type, it is recommended that you add a filter like the one shown below. This shortens the report to only show employees who have wages.

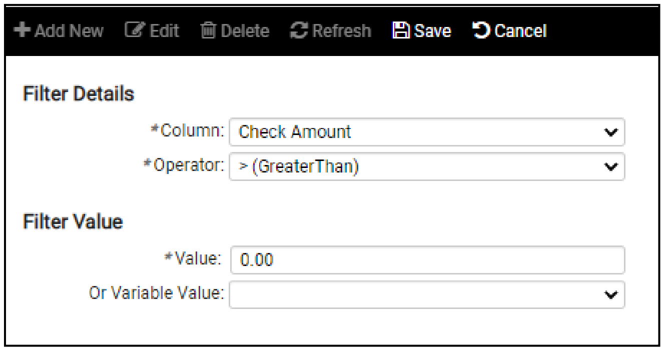
Check Detail Report (Per Payroll Run)

1. Navigate to **Reporting > Report Writer.**
2. Click **Add New**.
3. Select “Payroll Check Detail Report” from the **Report Type** dropdown menu.
4. Enter the desired report name into the **Report Title** field.
5. Select a **Font Size** from the dropdown menu. The default is “8pt.”
6. Select a **Font Face** from the dropdown menu. The default is “Arial.”
7. Select “Portrait” or “Landscape” from the **Report Orientation** dropdown menu.
8. Select the desired **Report Group** access from the dropdown menu.
9. Enter a **Description** for internal use, if desired.
10. Click **Save**.
    Note: If you want to see third party payee information, use the Report Type “Check File.”
11. Click the **Add Columns** tab.
12. Click **Edit**.
13. Add the categories displayed below from the **Field Category** dropdown menu. Add additional categories, if desired.
14. Click **Save**.

Added Columns

Category	Column
Employee Data	Employee Number
Employee Data	Employee Name
Check Details	Period Begin Date
Check Details	Period End Date
Check Details	Pay Date
Check Details	Check Amount
Check Details	Direct Deposit Amount
Check Details	Check / Voucher #
Check Details	Check Number
Check Details	Check Type

Note: For this Report Type, it is recommended that you use a filter like the one shown below. This shortens the report to only show employees who have live checks.


Add New
Edit
Delete
Refresh
Save
Cancel
Filter Details
*Column: Check Amount
*Operator: > (GreaterThan)
Filter Value
*Value: 0.00
Or Variable Value: