

## Shared Reports

As a Payroll Manager more reporting capabilities are provided versus than any other user group. Your additional permissions allow you to:

1. Copy reports
2. Manage reports for other User Accounts
3. Delete reports
4. Customize reports
5. Create brand new reports beyond the provided standard reports

## Running a Report

To run a report simply click on the PDF symbol next to the report name.

**Shared Reports**

▶ Common Reports ▶ **Previous Period** ▶ Current Period ▶ Attendance

- Exception Report  
Employees with Attendance Exceptions within Period
- Period Totals Report  
Selected Pay Designations by Employee organized in a grid.
- Time Card Report**  
Time Card Report, one employee per page.

## Emailing a Report

Click the double arrows to open up the report settings.


Reason Codes  
Shared System Reason Codes

Click on the Destination Change button.

Reason Codes Properties		
Basic	Reason Codes <i>Shared System Reason Codes</i>	<a href="#">Change</a>
Orientation	Portrait	<a href="#">Change</a>
Destination	Screen Include Export to Excel Icon	<a href="#">Change</a>
Permissions	Administrator, Payroll Manager, Supervisor	<a href="#">Change</a>
Customization	This report can be customized.	<a href="#">Customize</a>
Defaults	This report can be reverted to its factory settings.	<a href="#">Revert</a>
Make a Copy	Another [new] report can be created based upon the settings of this report.	<a href="#">Copy</a>

Click on the down arrow to select eMail and then type in your email address in the next field.

**Determine Report Destination**

**Destination**  

Choose Report Designation to Screen or via eMail.

**eMail Recipients List**

Enter the recipients list for eMailed report. Separate multiple eMail addresses with a semicolon(;). Leave blank to automatically eMail to the person who executed the report.

## Adjusting the Report Fields

To change the data that will be included in the report, click the double arrows to open up the areas you can adjust.

Time Card Report

Time Card Report, one employee per page.

**Time Card Report Properties**

Basic	Time Card Report <i>Time Card Report, one employee per page.</i>	<a href="#">Change</a>
Fields	Full Name (Last, First), ID Number, Badge No., Pay Class Name	<a href="#">Change</a>
Grouping	Each Employee. New page on each new group.	<a href="#">Change</a>
Period	Previous Week	<a href="#">Change</a>
Includes	Active Employees	<a href="#">Change</a>
Orientation	Portrait	<a href="#">Change</a>
Destination	Screen	<a href="#">Change</a>
Workgroups		<a href="#">Change</a>
Employee(s)		<a href="#">Change</a>
Exceptions	ATH, UNS, ABS, ADJ, LFE, TDY	<a href="#">Change</a>

Click on the [Change](#) button of the report category to add or remove items to include in the report or to make specific property setting changes.

**Time Card Report Properties**

Basic	Time Card Report <i>Time Card Report, one employee per page.</i>	<a href="#">Change</a>
Fields	Full Name (Last, First), Date of Hire, Current Rate of Pay	<a href="#">Change</a>
Grouping	Each Employee. New page on each new group.	<a href="#">Change</a>
Period	Previous Period	<a href="#">Change</a>

Double click on any items in the left column. Selected items are listed in the right column. Click the Okay to save new selections.

**Fields to Include**

**Select Fields**

Filekey Number	Add -> <- Remove Move Up Move Dn	Full Name (Last, First) Date of Hire
Last Name		
First Name		
ID Number		
SSN/SIN Number		
Badge No.		
First Letter of the Employee's Last Na		
First Two Letters of the Employee's L		
Middle Initial(s)		
Home Workgroup Set		
Home Workgroup Effective Date		
Pay Class Number		
Pay Class Name		
Pay Class Effective Date		
Schedule Pattern Number		
Schedule Pattern Name		
Schedule Pattern Effective Date		
Status Type Number		
Status Type Name		
Status Type Effective Date		
<b>Current Rate of Pay</b>		
Current Rate of Pay Effective Date		

Choose from the list of available fields. These fields are placed into your report.

Ok      Cancel

## Custom Date Ranges

Click the Period Change button to customize the date range.

Time Card Report

Time Card Report, one employee per page.

**Time Card Report Properties**

Basic	Time Card Report <i>Time Card Report, one employee per page.</i>	<a href="#">Change</a>
Fields	Full Name (Last, First), ID Number, Badge No., Pay Class Name	<a href="#">Change</a>
Grouping	Each Employee. New page on each new group.	<a href="#">Change</a>
Period	Previous Week	<a href="#">Change</a>
Includes	Active Employees	<a href="#">Change</a>
Orientation	Portrait	<a href="#">Change</a>
Destination	Screen	<a href="#">Change</a>
Workgroups		<a href="#">Change</a>
Employee(s)		<a href="#">Change</a>
Exceptions	ATH, UNS, ABS, ADJ, LFE, TDY	<a href="#">Change</a>

Select Custom from the Period drop down list. Type in the date range desired for this report.

**Determine Report Period**

**Period** Custom ▼

Choose the period encompassing this report.

**Custom Date From** 06/17/2012 ⇅

Enter the earliest date encompassing the report. Applies only when Custom is selected above.

**Custom Date To** 06/23/2012 ⇅

Enter the latest date encompassing the report. Applies only when Custom is selected above.

## Making a copy of a report

Before making changes to the default settings of any report, it is recommended you first copy the report since all User Accounts share the reports contained in the Shared Reports menu item. Therefore when you change a report you change it for all managers.

Copy of Time Card Report wo Rates

Time Card Report, one employee per page.

**Copy of Time Card Report wo Rates Properties**

Basic	Copy of Time Card Report wo Rates <i>Time Card Report, one employee per page.</i>	<a href="#">Change</a>
Fields	Full Name (Last, First), ID Number, Badge No., Pay Class Name	<a href="#">Change</a>
Grouping	Pay Class. New page on each new group.	<a href="#">Change</a>
	From Jun 17 - 30	<a href="#">Change</a>

Defaults [Reverse](#)

Make a Copy [Copy](#)

Another [new] report can be created based upon the settings of this report.

Name your Report. If you want to share the report with all Users select Leave Copy Here in the New Report Placement field.

## Title, Description and Location of New Report

**Report Title**

Report Title. The report title is placed at the top of the report.

**Description/Hint**

Additional information about this report.

**Report Group**

Name of Report Group to place this report into.

**New Report Placement**

The new report can be copied here, or a copy can be sent to another operator.

**Operator**

If you are making a copy of this report for another operator, select the operator here.