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To create a new custom report, click **Create New Custom Report**.

We have included a quick video tutorial for your reference.
Carefully review the type of report you need and then click **Start Report**.

**Tip:** The type of reports you can build will vary depending on your choice at this stage, e.g. payroll transactional data is not available under “Employee or Contractor Profile Data” or “Paid Time Off Transaction Data” sections).
If you selected “Payroll Transaction data on the previous screen, we automatically set your Payroll Check Date to the date of your last payroll. You can change this now or anytime by selecting Filter Your Report.
Give your report a name.

Provide a description if necessary.

Then look in the left hand panel to choose what fields you want to use.
When you find the necessary field(s), click on the field name and while still pressing down on the mouse button, drag your field into the preview area.

Tip: To gain more clarity on the field descriptions, just click on the help icon alongside the field names.
Field names are grouped in sections. For example, if you need employee set up information you can view those field options by clicking **Employees**.

If you need payroll data you can view all of those field options by clicking on **Payroll**.
You can rearrange the items within the preview area by moving the columns and dragging them into the order you need.
If you can’t find the field name you’re looking for you can use Search.

**Tip**: Search does not work for specific employee data such as an employee's name or city name.
Simply choose the relevant field and drag it into the preview area.
If needed, you can narrow your results from filtering your report by selecting the filter link or the tab.

For example: to view Check dates in the last few months, you would need to **Filter Your Report** and select the relevant timescales you want to see.
Select the field(s) you want to filter on, then click Add Filter Conditions.
To see Check dates between May 1st to July 30th, select “Between” in the first drop down, then enter the relevant dates.

Then decide whether you want the filter(s) to automatically apply when you run the report or if you would rather select your filter each time.

Once done click **Apply Change(s)**
Once you save your filters, your report will be automatically updated.

The preview mode will give you a guide to what has changed by only showing the first 5 rows of data, to see all your report data, click Run report then choose View Online.
If the report is complete, you can print from here or export your report into a PDF, CSV or Excel file.

If you need to make changes or save your report, click Close.
Now you can save your report for future use.

Click on **Save Report** and select one of the following:

- **Save**
- **Save as**
- **Save and Exit**.
You can also print or export your report from here.
All of your saved reports are stored under the Custom Reports tab within Reports.

You can identify the report by the title you gave it.
There are three options you can make to a saved report.

**View online** - if you would like to view or print the report.

**Revise Custom Report** - if you would like to make revisions.

**Delete Custom Report** - to delete the report.