

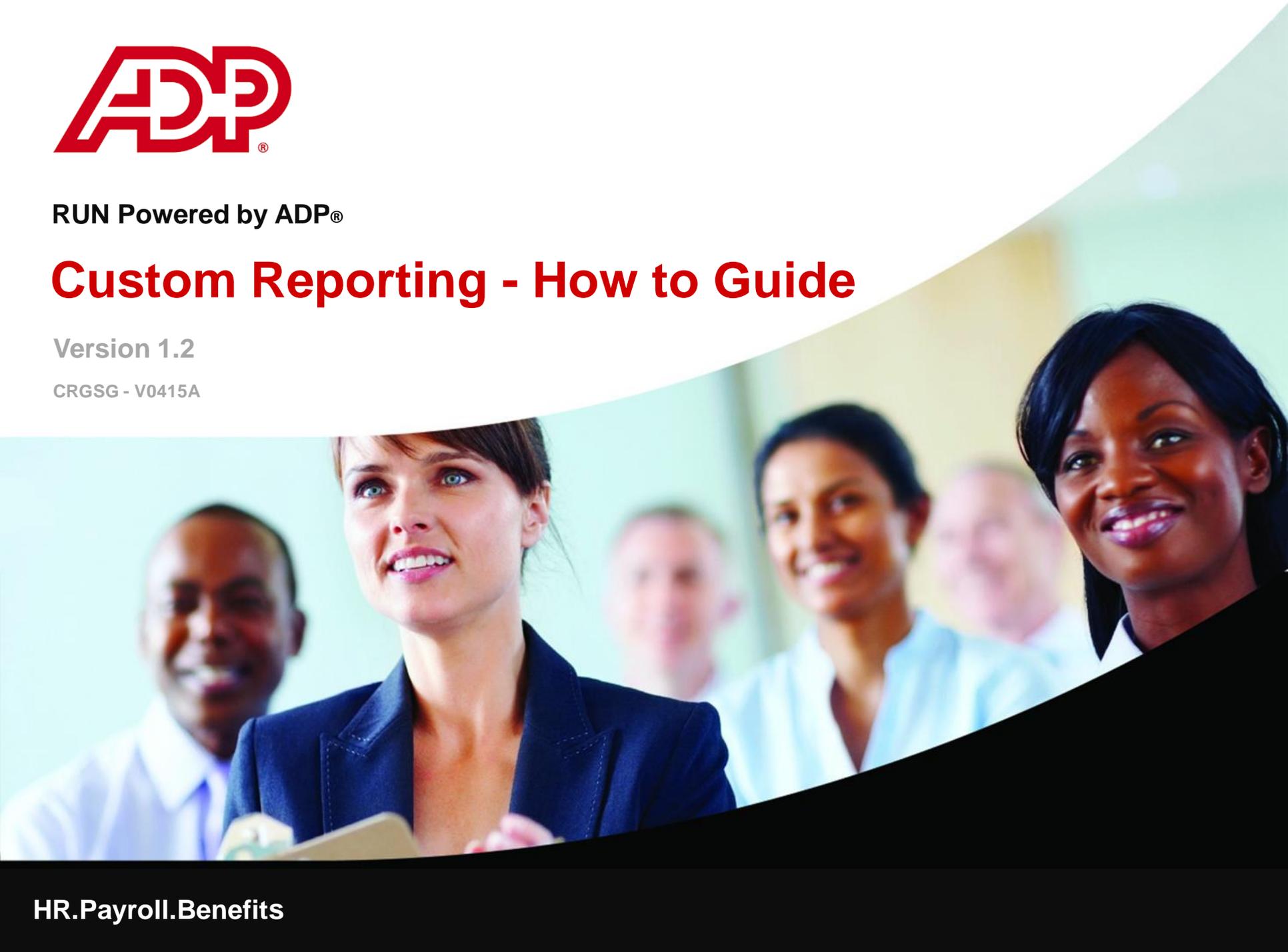


**RUN Powered by ADP®**

# **Custom Reporting - How to Guide**

**Version 1.2**

**CRGSG - V0415A**





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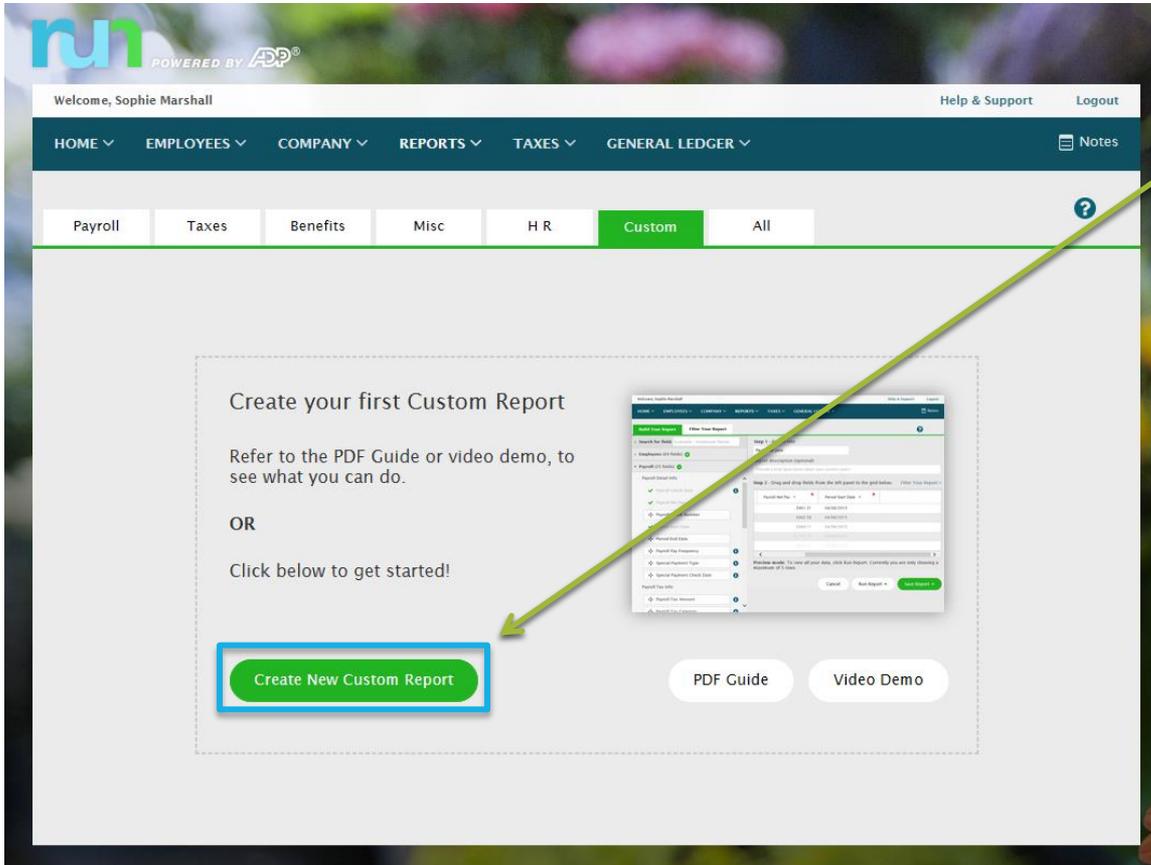
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Welcome, Sophie Marshall

Help & Support Logout

HOME EMPLOYEES COMPANY REPORTS TAXES GENERAL LEDGER Notes

Payroll Taxes Benefits Misc H R Custom All

Create your first Custom Report

Refer to the PDF Guide or video demo, to see what you can do.

OR

Click below to get started!

Create New Custom Report

PDF Guide Video Demo

**New Custom Report**

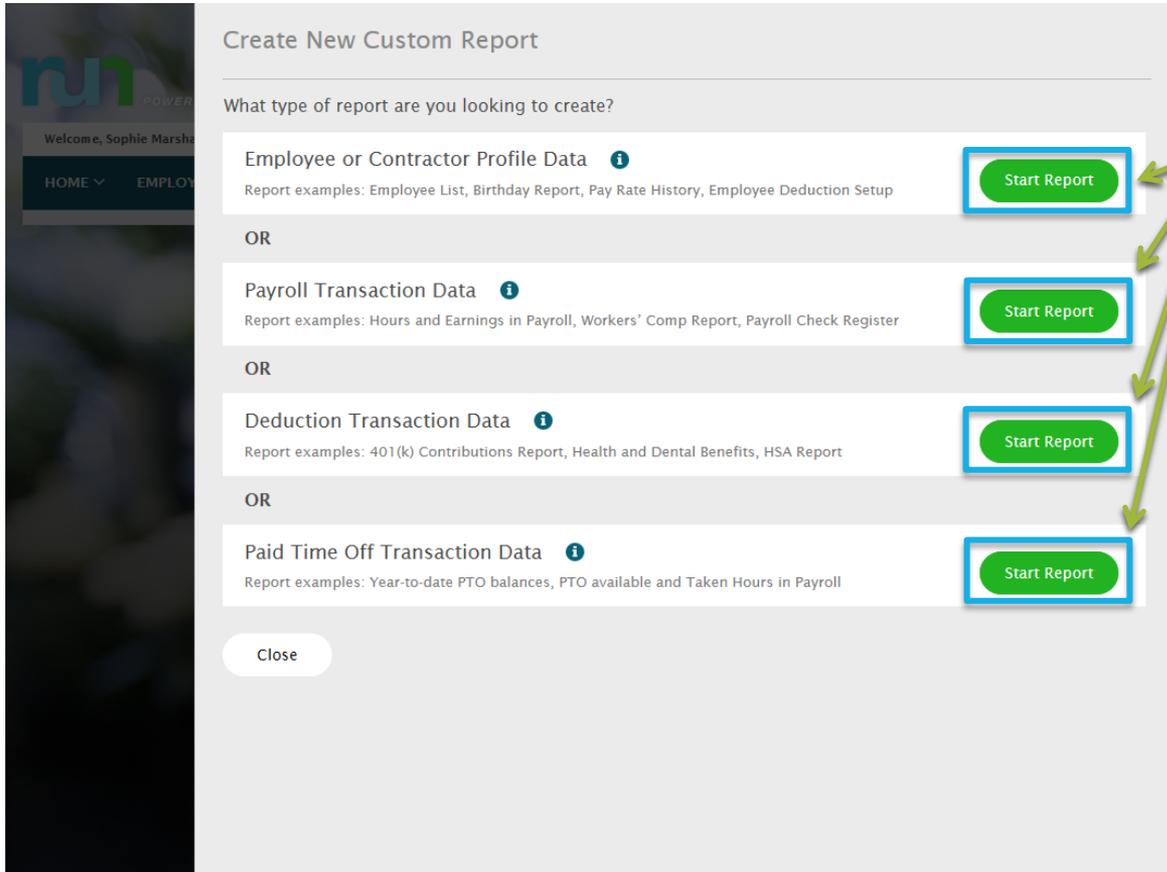
Step 1: Check the fields.

Step 2: Drag and drop fields from the left panel to the grid below.

Step 3: Click the 'Save' button to save your report.

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).

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Build Your Report Filter Your Report

Search for field: Example : Employee Name Step 1 - Report title:

Employees (69 fields) +

Payroll (25 fields) -

Payroll Detail Info:

- ✓ Payroll Check Date
- ✚ Payroll Net Pay
- ✚ Payroll Check Number
- ✚ Period Start Date
- ✚ Period End Date
- ✚ Payroll Pay Frequency
- ✚ Special Payment Type
- ✚ Special Payment Check Date

Payroll Tax Info:

- ✚ Payroll Tax Amount
- ✚ Payroll Tax Category

Please Note

The Payroll Check Date has been set to the date of your last payroll.  
If you would like to change this, click "Filter Your Report"

Do not show this message again

Filter Your Report Continue >

Cancel Run Report Save Report

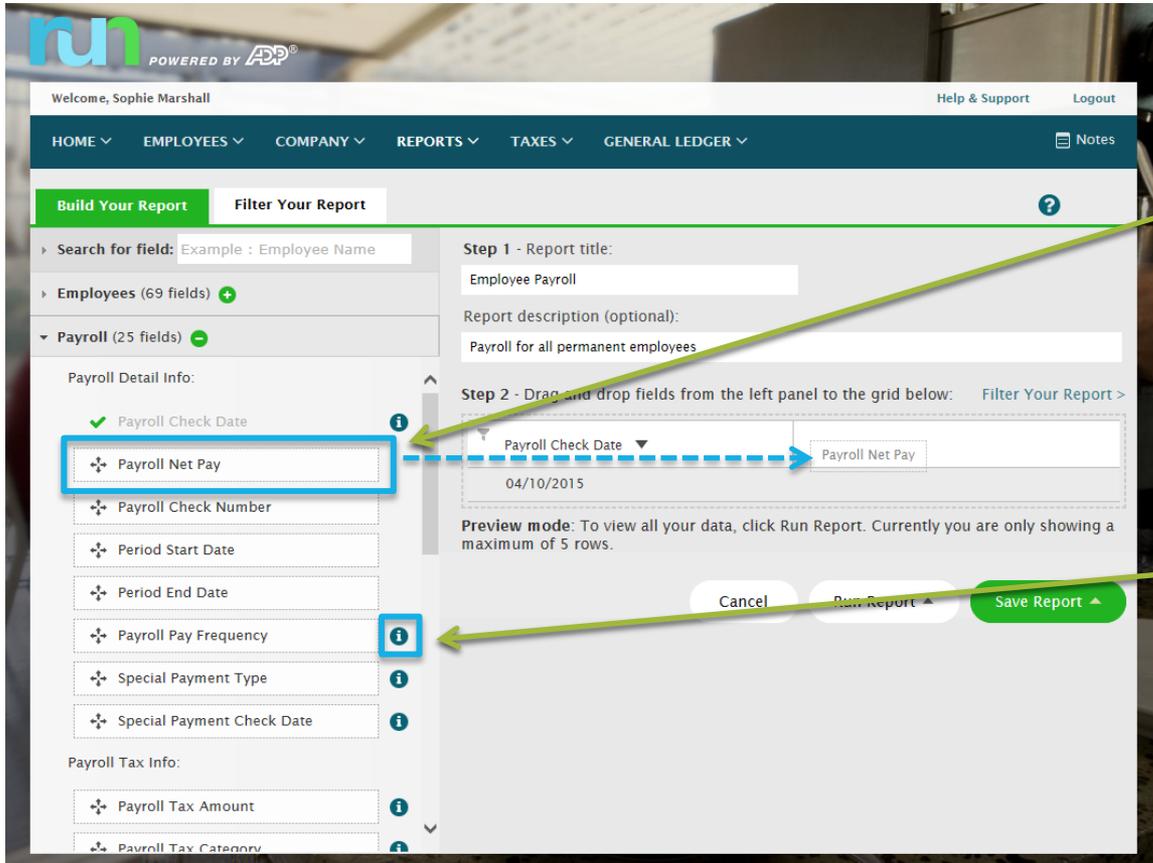
If you selected “Payroll Transaction data on the previous screen, we automatically set your Payroll Check Date to the date of your last payroll. You can change this now or anytime by selecting **Filter Your Report**.

The screenshot shows the 'Build Your Report' interface. On the left, a panel titled 'Build Your Report' contains a search bar and a list of fields under 'Employees (69 fields)' and 'Payroll (25 fields)'. The 'Payroll Detail Info' section includes fields for Payroll Check Date, Payroll Net Pay, Payroll Check Number, Period Start Date, Period End Date, Payroll Pay Frequency, Special Payment Type, and Special Payment Check Date. The 'Payroll Tax Info' section includes Payroll Tax Amount and Payroll Tax Category. The main area shows 'Step 1 - Report title:' with a text input field, 'Report description (optional):' with a text area, and 'Step 2 - Drag and drop fields from the left panel to the grid below:'. A grid shows 'Payroll Check Date' selected with a date of '04/10/2015'. At the bottom, there are 'Cancel', 'Run Report', and 'Save Report' buttons. A 'Preview mode' note states: 'To view all your data, click Run Report. Currently you are only showing a maximum of 5 rows.'

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.

The screenshot shows the ADP reporting interface. At the top, there's a navigation bar with 'HOME', 'EMPLOYEES', 'COMPANY', 'REPORTS', 'TAXES', and 'GENERAL LEDGER'. Below this, there are tabs for 'Build Your Report' and 'Filter Your Report'. A search bar is present with the text 'Search for field: Example : Employee Name'. On the left, there are two expandable sections: 'Employees (69 fields)' and 'Payroll (25 fields)'. The 'Employees' section is expanded, showing fields like 'Employee Name', 'Employee Status', 'Contractor (Y/N)', 'Hire Date', 'Birth Date', 'Termination Date', 'Last Day Worked', 'Leave of Absence Start Date', and 'Leave of Absence Return Date'. The 'Payroll' section is also expanded, showing a table with columns for 'Payroll Check Date' and 'Payroll Net Pay'. The table contains five rows of data. At the bottom, there are buttons for 'Cancel', 'Run Report', and 'Save Report'.

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**.

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HOME EMPLOYEES COMPANY REPORTS TAXES GENERAL LEDGER

Build Your Report Filter Your Report

Search for field: Example : Employee Name

Employees (69 fields)

Employee Info:

- Employee Name

Employment Info:

- Employee Status
- Contractor (Y/N)
- Hire Date
- Birth Date
- Termination Date
- Last Day Worked
- Leave of Absence Start Date
- Leave of Absence Return Date

Employee Payroll Info:

Payroll (25 fields)

Step 1 - Report title:

Employee Payroll

Report description (optional):

Payroll for all permanent employees

Step 2 - Drag and drop fields from the left panel to the grid below: Filter Your Report

Payroll Check Date	Payroll Net Pay	Employee Name
04/10/2015	\$901.31	Pearson, David
04/10/2015	\$402.58	Pearson, Angus
04/10/2015	\$484.11	Maddison, Kara T
04/10/2015	\$1,141.75	Williamson, Helen L
04/10/2015	\$1,141.75	Williamson, Helen L

Preview mode: To view all your data, click Run Report. Currently you are only showing a maximum of 5 rows.

Cancel Run Report Save Report

You can rearrange the items within the preview area by moving the columns and dragging them into the order you need.

The screenshot shows the ADP RUN reporting interface. At the top, there's a navigation bar with 'HOME', 'EMPLOYEES', 'COMPANY', 'REPORTS', 'TAXES', and 'GENERAL LEDGER'. Below this, there are two tabs: 'Build Your Report' and 'Filter Your Report'. A search box is highlighted with a blue border, containing the text 'Search for field: Payroll t'. Below the search box, there are three suggested fields: 'Payroll Tax Amount', 'Payroll Tax Category', and 'Payroll Tax Jurisdiction'. The main area is divided into two steps: 'Step 1 - Report title:' and 'Step 2 - Drag and drop fields from the left panel to the grid below:'. Step 1 includes a text input for 'Employee Payroll' and a description 'Payroll for all permanent employees'. Step 2 shows a grid with columns for 'Payroll Check Date', 'Employee Name', and 'Payroll Net Pay'. The grid contains four rows of data. At the bottom, there are buttons for 'Cancel', 'Run Report', and 'Save Report'. A 'Preview mode' note at the bottom states: 'To view all your data, click Run Report. Currently you are only showing a maximum of 5 rows.'

Payroll Check Date	Employee Name	Payroll Net Pay
04/10/2015	Pearson, David	\$901.31
04/10/2015	Pearson, Angus	\$402.58
04/10/2015	Maddison, Kara T	\$484.11
04/10/2015	Williamson, Helen L	\$1,141.75

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.

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HOME ▾ EMPLOYEES ▾ COMPANY ▾ REPORTS ▾ TAXES ▾ GENERAL LEDGER ▾ Notes

**Build Your Report** **Filter Your Report** ?

Search for field: Payroll t

Found within 'Payroll' section:

- ✓ Payroll Tax Amount
- ✕ Payroll Tax Category
- ✕ Payroll Tax Jurisdiction

Step 1 - Report title:  
 Employe... payroll

Report description (optional):  
 Payroll for all permanent employees

Step 2 - Drag and drop fields from the left panel to the grid below: [Filter Your Report >](#)

Name	Payroll Net Pay	Payroll Tax Amount
David	\$901.31	\$315.49
Angus	\$402.58	\$84.44
, Kara T	\$484.11	\$112.20
n, Helen L	\$1,141.75	\$687.03

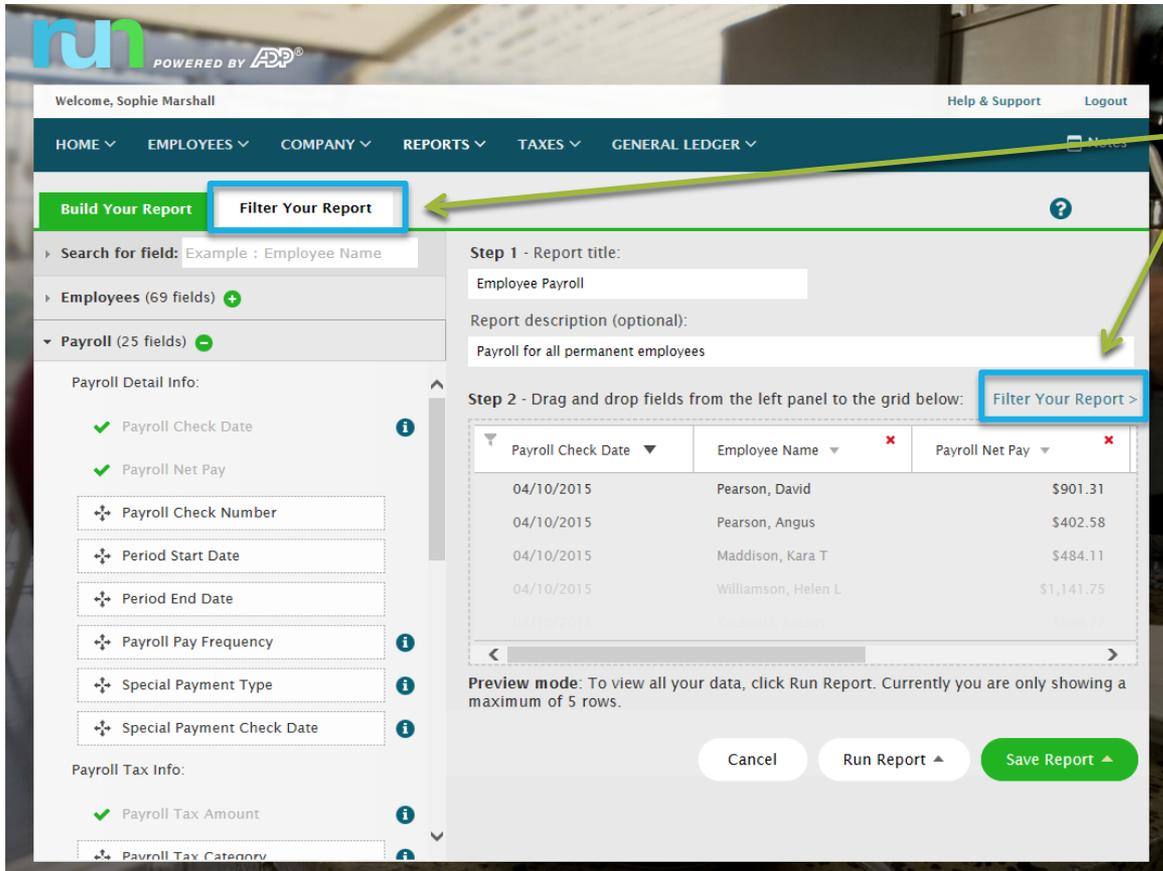
Preview mode: To view all your data, click Run Report. Currently you are only showing a maximum of 5 rows.

Cancel Run Report ▲ Save Report ▲

Employees (69 fields) +

Payroll (25 fields) +

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.

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Build Your Report **Filter Your Report**

Which fields do you want to filter on?

- Payroll Check Date [View / Edit](#)
- Employee Name
- Payroll Net Pay
- Employee Status [View / Edit](#)
- Payroll Tax Amount

**Add Filter Conditions**

Step 1 - Report title:  
Employee Payroll

Report description (optional):  
Payroll for all permanent employees

Step 2 - Drag and drop fields from the left panel to the grid below: [< Build Your Report](#)

Payroll Check Date	Employee Name	Payroll Net Pay
04/10/2015	Pearson, David	\$901.31
04/10/2015	Pearson, Angus	\$402.58
04/10/2015	Maddison, Kara T	\$484.11
04/10/2015	Williamson, Helen L	\$1,141.75

Preview mode: To view all your data, click Run Report. Currently you are only showing a maximum of 5 rows.

Cancel Run Report Save Report

Select the field(s) you want to filter on, then click **Add Filter Conditions**.

**Add Filter Conditions**

**Payroll Check Date:** Between 05/01/2015 and 06/30/2015

**Employee Status:** Equal to

Use this filter value every time this report is run
  Ask for a filter value every time this report is run

Cancel Apply Changes

To see Check dates between May 1st to July 30<sup>th</sup>, 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)**

Which fields do you want to filter on?

- Payroll Check Date View / Edit
- Employee Name
- Payroll Net Pay
- Employee Status View / Edit
- Payroll Tax Amount

[Add Filter Conditions](#)

**Step 1 - Report title:**  
Employee Report

**Report description (optional):**  
*Provide a brief description about your custom report*

**Step 2 - Drag and drop fields from the left panel to the grid below:** < Build Your Report

Payroll Check Date	Employee Name	Payroll Net Pay
01/02/2015	Pearson, David	\$837.71
01/02/2015	Pearson, Angus	\$402.58
01/02/2015	Maddison, Kara T	\$484.11
01/02/2015	Williamson, Helen L	\$141.55
01/02/2015	Kanfinski, Robert	\$399.77

**Preview mode:** To view all your data, click Run Report. Currently showing a maximum of 5 rows.

[View Online](#)  
[Print](#)  
[Export as Pdf](#)  
[Export as xls](#)  
[Export as Xlsx](#)  
[Export as Csv](#)

[Cancel](#) [Run Report](#) [Save Report](#)

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**.

Online View ?

Employee Report

Payroll Check Date	Employee Name	Payroll Net Pay	Employee Status	Payroll Tax Amount
01/02/2015	Pearson, David	\$837.71	Active	\$493.2
01/02/2015	Pearson, Angus	\$402.58	Active	\$87.5
01/02/2015	Maddison, Kara T	\$484.11	Active	\$130.7
01/02/2015	Williamson, Helen L	\$1,141.76	Active	\$740.5
01/02/2015	Kaplinski, Robert	\$699.77	Active	\$381.2
01/02/2015	O'Connor, Peter R	\$1,620.00	Active	
01/02/2015	Speed Couriers	\$950.00	Active	
01/02/2015	Humbert, Tara R	\$780.61	Active	\$444.5
01/02/2015	Fotheringham-Winters O'Connell, Charlotte L'Any May-Fay Grace T	\$361.36	Active	\$172.3
01/02/2015	Standen-Grant, William	\$541.31	Active	\$289.1
01/02/2015	Marshall, Penny	\$413.34	Active	\$185.6
01/02/2015	Greenbaum, Natasha	\$410.16	Active	\$163.3
01/02/2015	Harman, Ella T	\$539.05	Active	\$150.3
01/02/2015	Schwartz, Martin	\$425.47	Active	\$170.9
01/09/2015	Pearson, Angus	\$402.58	Active	\$87.5
01/09/2015	Maddison, Kara T	\$484.11	Active	\$130.7

× Close Print ▲ Export ▲

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**.

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Notes

**Build Your Report** **Filter Your Report**

Which fields do you want to filter on?

- Payroll Check Date [View / Edit](#)
- Employee Name
- Payroll Net Pay
- Employee Status [View / Edit](#)
- Payroll Tax Amount

[Add Filter Conditions](#)

**Step 1 - Report title:**  
Employee Report

**Report description (optional):**  
*Provide a brief description about your custom report*

**Step 2 - Drag and drop fields from the left panel to the grid below:** [< Build Your Report](#)

Payroll Check Date	Employee Name	Payroll Net Pay
01/02/2015	Pearson, David	\$837.71
01/02/2015	Pearson, Angus	\$402.58
01/02/2015	Maddison, Kara T	\$484.11
01/02/2015	Williamson, Helen L	\$1,141.76
01/02/2015	Kaplinski, Robert	\$699.71

**Preview mode:** To view all your data, click Run Report. Currently you are viewing a maximum of 5 rows.

[Cancel](#) [Run Report](#) [Save Report](#)

Save  
Save as  
Save and Exit

Now you can save your report for future use.

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

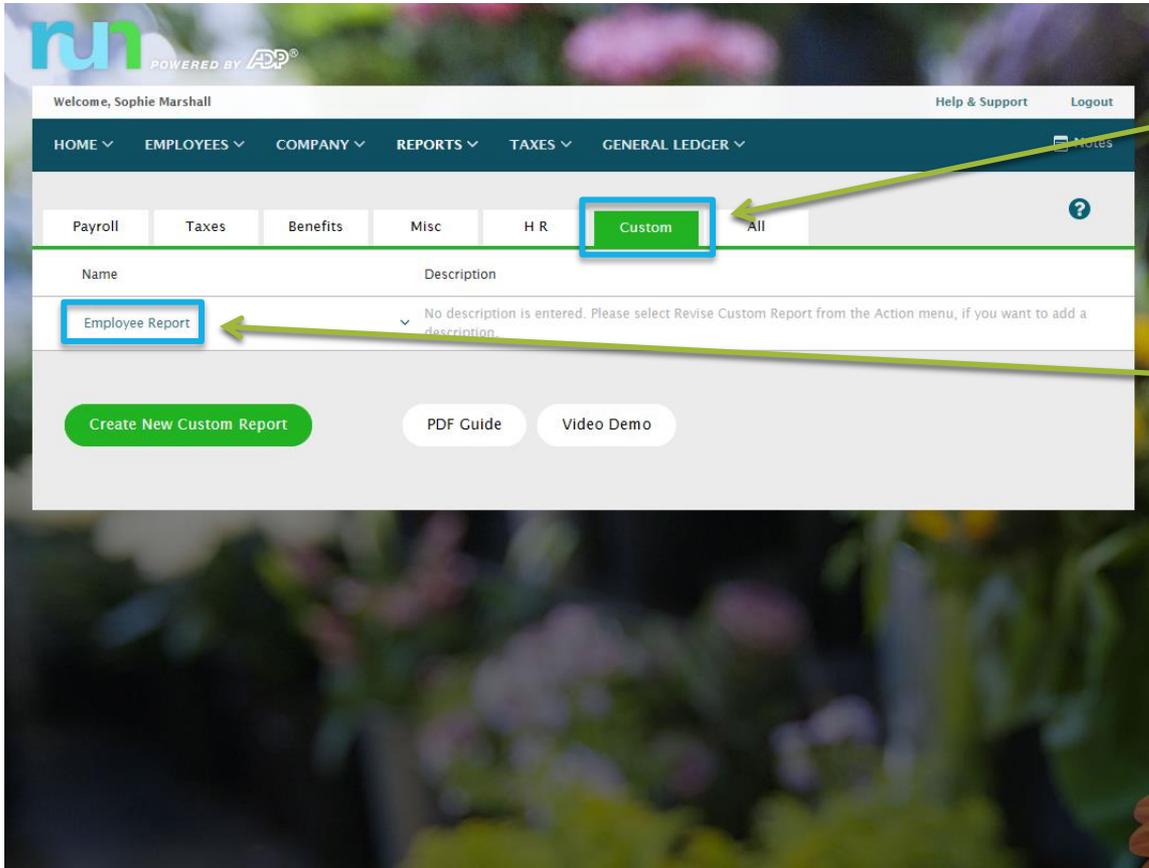
- Save**
- Save as**
- Save and Exit.**

The screenshot shows the ADP reporting interface. On the left, there are filter options for 'Payroll Check Date', 'Employee Name', 'Payroll Net Pay', 'Employee Status', and 'Payroll Tax Amount'. The 'Employee Status' filter is selected. The main area is titled 'Build Your Report' and shows 'Step 1 - Report title: Employee Report' and 'Step 2 - Drag and drop fields from the left panel to the grid below:'. A table displays the following data:

Payroll Check Date	Employee Name	Payroll Net Pay
01/02/2015	Pearson, David	\$837.71
01/02/2015	Pearson, Angus	\$402.58
01/02/2015	Maddison, Kara T	\$484.11
01/02/2015	Williamson, Helen L	,141.76
01/02/2015	Kaplinski, Robert	\$699.77

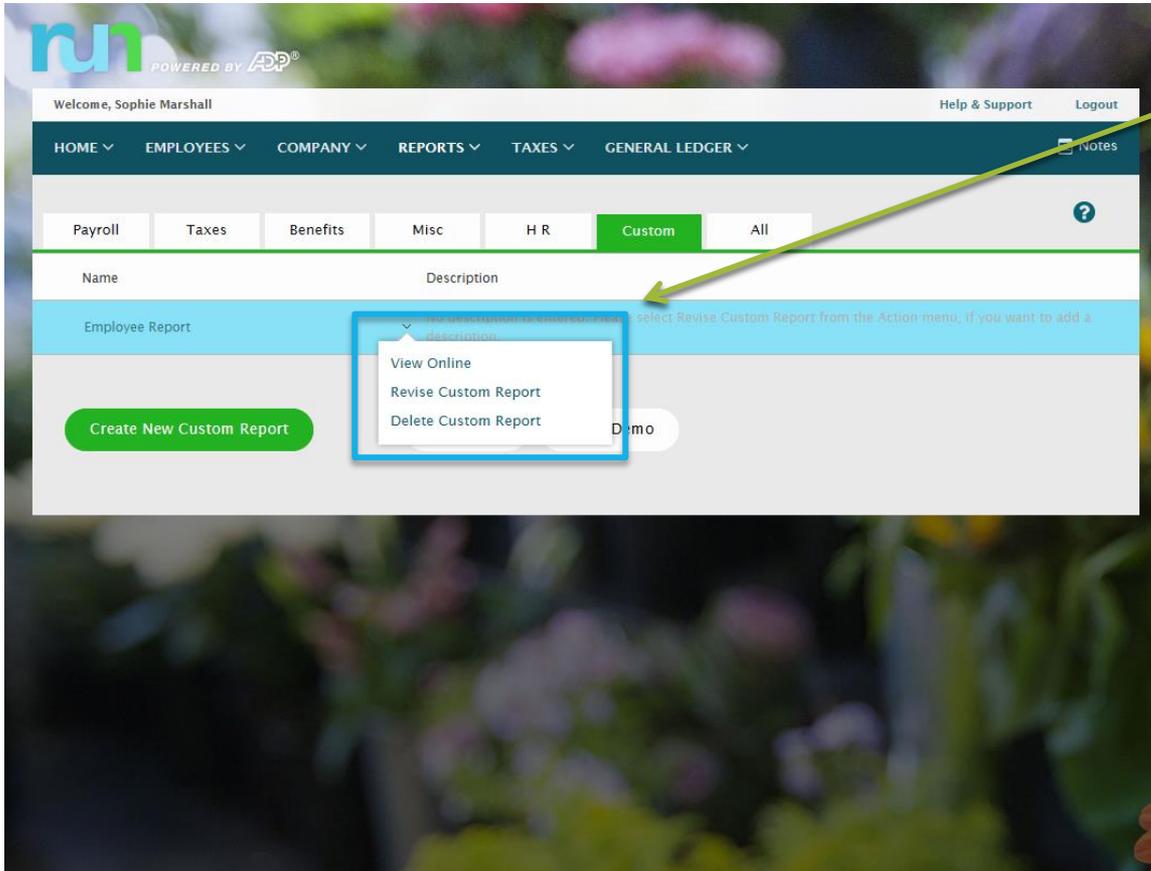
A context menu is open over the table with options: View Online, Print, Export as Pdf, Export as xls, Export as xlsx, and Export as Csv. The 'Run Report' button at the bottom is highlighted with a blue box. A green arrow points from the 'Print' option in the context menu to a text box on the right.

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.