

## Overview

In Manager Access, you can use the Reporting tool to view, print, and download information about your direct reports and any employees they manage. You can run reports from existing templates or create your own custom reports to suit your specific needs. The information you can view in the reports depends on the rights the administrative user assigns to you in Manager Access.

## Report Types and Descriptions

Two types of reports are available to you in Manager Access. You can use the existing report templates or create custom report templates.

Type	Description
Point-in-Time	Provide real-time data about specific employee or dependent data stored in ADP's HR/Benefits Solution
Historical	Show the changes made to the selected effective-dated fields, such as jobs and earnings, within a specified date range

## Report Dates

When creating a report, you can select data from a past, current, or future date, as follows:

Type	Displays data that is effective:
Past	At the end of business on the date you select
Current	As of the current date and time
Future	On the future date you select

## The Report Management Page

You run point-in-time and historical reports from the Report Management page. On the Report Management page, you can:

- Create a new report or template
- Generate the default (system-generated) report templates
- Run a report using an existing template
- Edit an existing report template
- Manage the templates in your Favorite Templates list

The following illustrates the Report Management page that displays in Manager Access.

**Note:** The All Teams List report template displays only for managers with direct reports who manage other employees.

## Elements and Descriptions

The following table describes the elements of the Report Management page:

Element	Description								
Report Type list	Select a point-in-time or historical report template from the list and click Create to generate a new report or template.								
Favorite Templates list	Lists the report templates you add to the favorites list. Add report templates to this list that you will use frequently to run reports. You can sort this list by the Name, Type, Last Edited By, or Last Edited Date field by clicking the column heading.								
Run Report button	Click this button to run a report using the selected template.								
Edit Template button	Click this button to edit the selected report template.								
Remove from Favorites button	Click this button to remove the selected template from the Favorite Templates list. The report template will still be included in the All Templates list.								
Last Edited By column	<table border="1"> <thead> <tr> <th>The Last Edited Field displays:</th> <th>When:</th> </tr> </thead> <tbody> <tr> <td>Your name</td> <td>You create a custom template</td> </tr> <tr> <td>"System Generated"</td> <td>The system generates a template (default)</td> </tr> </tbody> </table>	The Last Edited Field displays:	When:	Your name	You create a custom template	"System Generated"	The system generates a template (default)		
The Last Edited Field displays:	When:								
Your name	You create a custom template								
"System Generated"	The system generates a template (default)								
Last Edited Date column	Reflects the most recent date the template was saved								
All Templates list	Lists all report templates, including system-generated templates and templates you created								
Generate Default Templates button	Click this button to restore the default (system-generated) templates to the All Templates list. <b>Note:</b> No templates display the first time you access the Report Management page. You must click this button to display your templates.								
Filter By list	Select how you would like to filter from the list, enter the search criteria for the filter, and click Filter to limit the display to certain templates. <table border="1"> <thead> <tr> <th>Filter By</th> <th>Filter Criteria</th> </tr> </thead> <tbody> <tr> <td>Name</td> <td>Enter a report name or keyword.</td> </tr> <tr> <td>Type</td> <td>Select a point-in-time or historical report.</td> </tr> <tr> <td>Last Edited By</td> <td>Enter your name or "System Generated."</td> </tr> </tbody> </table>	Filter By	Filter Criteria	Name	Enter a report name or keyword.	Type	Select a point-in-time or historical report.	Last Edited By	Enter your name or "System Generated."
Filter By	Filter Criteria								
Name	Enter a report name or keyword.								
Type	Select a point-in-time or historical report.								
Last Edited By	Enter your name or "System Generated."								
Show All button	Click this button to remove the filter and show all report templates.								
Add to Favorites button	Click this button to add the selected report template to the Favorite Templates list.								
Delete button	Click this button to delete the selected report template(s).								

## Report Templates and Descriptions

Report templates make it easy for you to create and run reports. In Manager Access, you can generate both point-in-time and historical reports based on report templates. The template you choose specifies the data fields to include in a report.

- The templates that display in the All Templates list are based on the user rights your company assigns to you in Manager Access.
- The All Teams List report template displays only if one or more of your direct reports have their own direct reports.

The following table describes the two types of report templates available to you in Manager Access:

Template	Description
Default	Provide commonly used lists of employee data. In the All Templates list, default reports are those that are "System Generated."
Custom	You create custom templates by specifying search criteria, choosing different fields to include in the report, or setting display options. You save custom report templates and reuse them as needed.

### Additional Resources

For more information on custom templates, see the *Editing, Creating, and Filtering Report Templates* job aid.

### Generate Default Templates Button

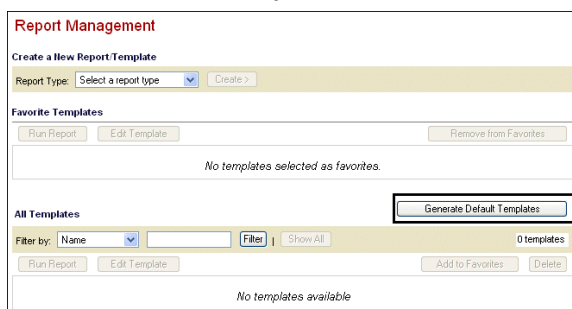
When you first access the Report Management page, no templates display. You use the Generate Default Templates button to display all of the system-generated default templates available to you based on your access rights. You can also use the Generate Default Templates button to restore the system-generated default templates if one or more are accidentally erased or modified.

### Using the Generate Default Templates Button

The following table describes how to add or restore your system-generated default templates:

Step	Action
1	Point to the <b>Reports</b> section and select <b>Report Management</b> .

- 2 Click **Generate Default Templates**.



The screenshot shows the 'Report Management' page. At the top, there is a 'Create a New Report/Template' section with a 'Report Type' dropdown and a 'Create >' button. Below that is the 'Favorite Templates' section, which is currently empty with the message 'No templates selected as favorites.' and buttons for 'Run Report', 'Edit Template', and 'Remove from Favorites'. The 'All Templates' section is below, showing a filter by 'Name' and a 'Filter' button. A 'Generate Default Templates' button is highlighted with a red box. Below the filter, there are buttons for 'Run Report', 'Edit Template', 'Add to Favorites', and 'Delete', and the message 'No templates available'.

**Note:** If templates already exist in your All Templates list, a warning message displays listing all the existing report templates in your All Templates list that have the same name as a default template.

- 3 Click **OK**.  
**Result:** The system-generated default templates are added or restored to the All Templates list.

### Important Information

Any changes you make to an existing system-generated template without saving it as a custom template will be lost if you use the Generate Default Templates button.