

# WORKFORCE ONE

Reports



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# Introduction

This document is intended as a comprehensive resource for the payroll section of the system. Some things you should note about this document:

- Any time you see an item marked in **bold** it means it is a button or option to select.
- Tables below large screen shots are there to describe the various options in the screen shot above (which normally have a bold rectangle around them).
- Anything in *italics* is the name of the window you are viewing.
- If you ever see this popup below, it means you have not saved your work. Select cancel, save your work, and then you won't get that popup and can continue through the system.

Leave site?		
Changes you made may not be saved.		
	Leave	Cancel



# Reports

# Selecting the Time Period of a Report

Most of the areas in the system can be exported as a Report. But many reports are available in the Reports menu. Any reports that you create, and save (shown below), on your own will be stored in the My Saved Reports option. The additional areas, HR, Payroll, and System contain their appropriate reports. For purposes of this demonstration we will select Payroll Register (By Account).

1. Select the Hamburger Menu (highlighted below).



2. Select My Reports.



- 3. Select Payroll.
- 4. Select Payroll Register.



5. Select by Account.



Back Home > > Payroll Register (By Account)	Download	View By PST Summary	View By PST	
Rows On Page         10 ~         Showing: 1-10 of 11         <         Page         1         Of 2         > <th< th=""> <!--</td--><td>5</td><td>[Default] 🗸 🔅</td><td>▼ ==</td><td>đ</td></th<>	5	[Default] 🗸 🔅	▼ ==	đ
Pay Dates: Calendar Range 🗸 Last And Current Months 🗸 (01/01/2019 – 02/28/2019)	Employee Filter: 🤽 All Employees	Display Settings: 🖉		
Extra Settings: Show Only Finalized Payrolls SSN Format Do Not Display ~ Show Co Show Report Total On Separate Page	st Center 🗌 Show All CCs 🗌 Include ER	Taxes		
Display as Image: Options: Include Successorship Pay Statements				

# **Report Options:**

Option	Description
Pay Dates	This drop-down allows you to select from calendar range (by month, quarter, etc.) Date range allows you specify which dates you want to include. Expression will let you build a formula to the date range. Specific payroll lets you pick from a list of payrolls to view and finally payroll filter allows you to pick and choose which payrolls you want to see in one report.
Employee Filter	Selecting this filter will allow you to select employees, saved lists, company groups, company profiles, or advanced filters that let you drill down into more granular detail about the employees. For example, filter by anything from address or benefit types.
Extra Settings	<ul> <li>Show Only Finalized Payrolls: eliminates payrolls that are not final.</li> <li>SSN Format: this drop-down will let you display the social security number, part of the number, or not at all.</li> <li>Show Cost Centers: will display the cost center that employee is in</li> <li>Show All CCs: will display sub cost centers.</li> <li>Include ER Taxes: include Employer Required taxes.</li> <li>Showing Report Total On Separate Page: will summarize all totals on a final page at the end of the report. Your report will display on the screen. The report can be downloaded for printing, saving, emailing, etc.</li> </ul>

6. For a printed/downloaded version, finalize your choices and select the export button on the top right of your screen as highlighted in the screenshot below.

Back Home > > Payroll Register (By Account)	Download	View By PST Summary	View By PST	
Rows On Page         10 v         Showing: 1-10 of 11         <         Page         1         Of 2         >         5	23	[Default] 🗸 🔅	<b>▼</b> ==	±.
Pay Dates: Calendar Range 🗸 Last And Current Months 🗸 (01/01/2019 – 02/28/2019) Employee Filter. 🚣 All Em	ployees	Display Settings: 🖉		
Show Only Finalized Payrolls SSN Format Do Not Display - Show Cost Center Show All CCs	Include ER	Taxes		
Show Report Total On Separate Page				
Display as Image: Options: Include Successorship Pay Statements				

7. Select the export file format you want for your report.



Export I	Report		
Available Exp	port Formats		
.xls	Excel 97-2007	Microsoft Excel 97-2007 Workbook	.xls
.xlsx	Excel 2007	Microsoft Excel 2007 Workbook	.xlsx
.pdf	PDF	Acrobat Reader	.pdf
.html	HTML (Paged)	HTML (Paged)	.html
Display	Information Header/Footer		

#### Adding/Changing Report Columns

Selecting which columns, you want added or removed from your report is easy. In addition, after you've designed your perfect your report, you can save those settings so that it's easy to select in the future.

1. Select the Select Columns icon.

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	Download	View By PST Summary	View By PST	
[Default] 🗸 🔅 Setti	ngs 🗸 🌱 🍸	Filter ∧ ≣≣ Select C	olumns 🕂 Export	
Select Report Columns				Х
Available Columns	٩	Selected Columns		
Button: View/Edit Employee	•	Button: Employee Quick Lin	nks	
Company: System Id	•	Payroll Register		
Company: Short Name	•	Employee: Employee Id		\$
Company: Name	•	*		
Company: VAT Registration #	•	••		-
Company: Company Registration # (GB)	•			
Сотралу: Туре	•			÷
Employee: Account Id	•			
Employee: Badge	• •			
			Select Co	lumns



- 2. On the left are the available columns. You can scroll to find the column you want or use the magnifying glass to search for a column.
- 3. Select the right arrow next to any column title and move it to the Selected Columns section.
- 4. Select the arrows on the Selected Columns to remove them from the view.
- 5. Select the Select Columns button to save your column set up.

#### **Save Report View**

If you want to use this view for the future, save the settings, and you'll be able to toggle between the default view and the new one you created. You can create multiple report views and save them in the same manner.

- 1. Select Settings Cog Wheel/Drop-down menu.
- 2. Select Save Settings (as displayed below).



3. Give the settings a name.

Save Report Settin	gs	X
Name		
Default 🗌 Run Immediately 🗹		
	Cancel	•



- 4. If you select the Default checkbox that will be the first display you see. It will NOT replace the current report saved as Default.
- 5. Select the **Save** button on the top right corner to save your work.



## Filters, Options, Exporting, Reports

Below is the upper portion of the Payroll Register by Pay Statement Order (PST). See the table below the screenshot to understand what each function does.

Back Home > My Reports > Payroll > Payroll Register > By PST > Payroll Register (By PST)			
Bows On Page 10 V Showing: 1-10 of 25 C Page 1 Of 3 > *>			
Pay Dates: Calendar Range V Last And Current Months V (12/01/2018 – 01/31/2019) Employee Filter: 🤽 Group: Hourly (15) Clear	D		
Extra Settings: Show Only Finalized Payrolls 📄 SSN Format Do Not Display 🧹 Show Cost Center 🗌 Show All CCs 🗌 Include ER Taxes	]		
Display as Image: Options: Include Successorship Pay Statements			

Function	Description
Rows On Page	This drop-down allows you to see more than just the defaulted view of 10 rows. This example shows that we have a total of 25 employees. If we select the drop-down menu we could see additional rows and display all 25 employees on one screen.
Pay Dates	Select the range you want to view. Multiple options are available including date, fiscal time frame, quarter view, etc.
Employee Filter	Allows you to select a specific group of people to view instead of the entire organization.
Show Only Finalized Payrolls	will only show final payrolls and not those in progress or review.
SSN Format	Because of the sensitivity of this information, if you were going to print this report or show it to others in the organization, you may not want to display any of their social security information. However, partial, full, and none are all options for the social security number.
Show Cost Center	Displays the cost center that the employee is included.
Show All CCs	This displays any child cost centers that the employee is included. They may be a cost center of Sales but with this option you would see if they were in a specific area of Sales.



Include ER	This shows the taxes that the Employer is responsible for on the pay
Taxes	statement.

#### **Pay Statement History**

The Pay Statement History displays all pay statements. The information is shown in a horizontal format. You can customize the view of the report so that each employee is displayed on one line with their details displayed in columns. The report has multiple views, filtering options, and can be exported in various formats (html, pdf, excel, etc.)

#### How to View Pay Statement History

1. Select the Hamburger Menu (highlighted below).



2. Select My Reports.



3. Select Payroll.

✓ My Reports	
My Saved Reports	
→ HR	
✓ Payroll	-

4. Select Pay Statement History.





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Employee F	filter: 🔏	All Employe	es Pa	y Dates: (	Calendar Range 🗸	Last Month 🗸 (12/	/01/2018 - 12/31/2018)	
☐ All ☐ Page			C Employee	Id	≎ First Name	C Last Name	≎ Employee Status	≎ Туре
			=	~	starts with	✓ starts with	-	<ul> <li>✓ starts with</li> </ul>
	Eq	ð		1	Monica	Gellar	Active	Regular
	Eq	ð		2	Rachel	Green	Active	Regular

Pay Statement History

Once in the *Pay Statement History* window, choose a time-period you wish to view from the menu highlighted in the screenshot above.

### **Payroll Register**

The Payroll Register will display a record for each pay statement, by employee, in the payroll and additional reports can be spawned from this register.

#### How to View the Payroll Register

1. Select the Hamburger Menu (highlighted below).



1. Select My Reports.



2. Select Payroll.



My Saved Reports	
> HR	
> Payroll	

3. Select Payroll Register (**By PST**). By PST means the report is displayed in Pay Statement order.

✓ Payroll Register	
By PST	-

Back Ho	ome > My Reports >	Payroll ⇒ Pay	roll Registe	er⇒ By PS	T⇒ Payrol	l Register (By PST)			Download	View By PST Summary	Viev	N BY ACC	count	
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								the second second						
play as Imag	ge: 💷 🛛 Options: 🗆	Include Succe	essorship Pay	Statements	s									
Payro	oll Register													
Payro	oll Register Monica Gellar De	:fault - #1				Pay Date: 12/07/2018 (1	1/25 - 12/01	L)	Type: Regular, Cate	gory: Regular, Pay Statemer	nt #: 14 (	(1)		<b>^</b>
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Payroll Register by PST

## Options

Above is the Payroll Register by PST. Three options, which are highlighted, are **Download**, **View By PST Summary**, and **View By Account**.

Option	Description
Download	Can download the report to Excel or PDF format.
View By PST	Displays a summary per employee. Within the PST Summary you can select
Summary	the and drill into the details of that particular employee. From that window you can send the Pay Statement to an employee or download it as a PDF by selecting either the send To or bounded PDF buttons.
View by Account	This report provides the costs centers breakout in the same view as a payroll register broken down by employee.

