PAYPRO
Workforce Management

WORKFORCE ONE

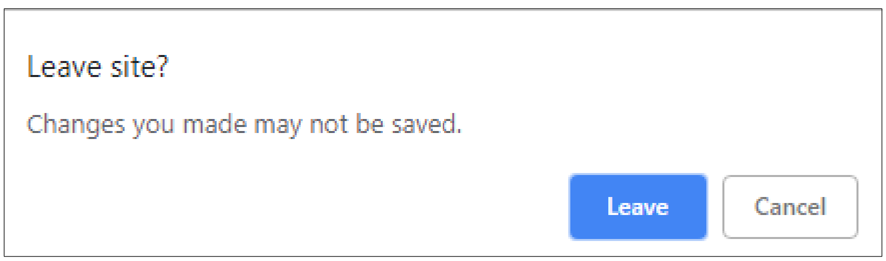
Viewing Payroll Data

CONTENTS

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.

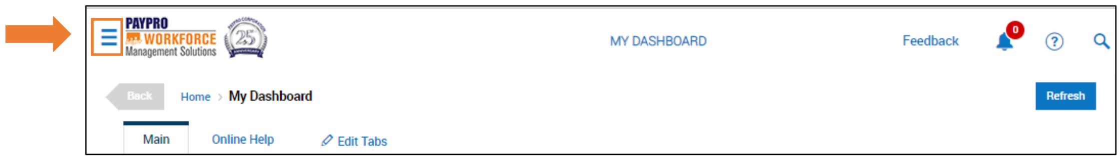


Changing Pay Rates

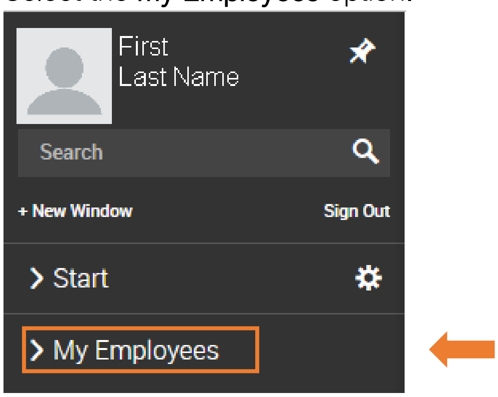
We will give you two examples of updating compensation—one for hourly and one for salary. Our first example is hourly.

Example: Updating an Hourly Employee

1. Select the Hamburger Menu (highlighted below).

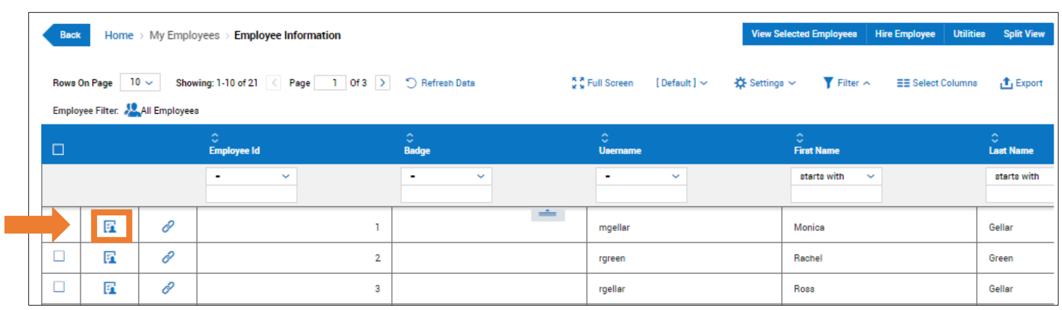


2. Select the My Employees option.



The menu expands.

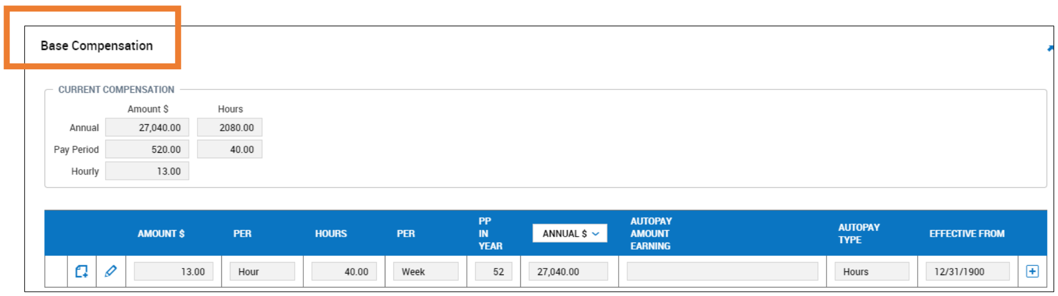
3. Select Employee Information under My Employees.



Employee Information Pane

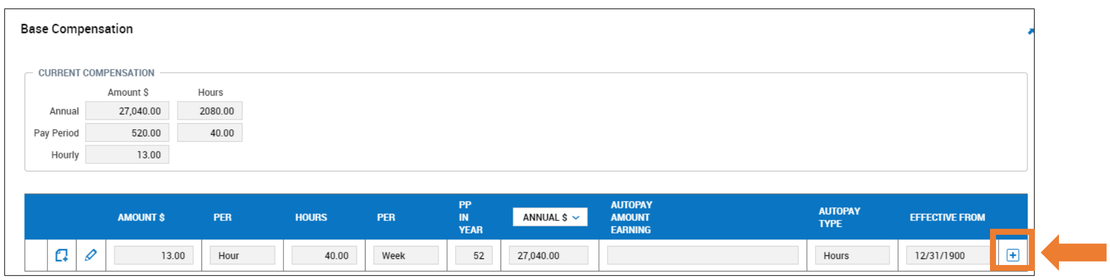
4. Select the icon to select the employee's payroll information.
5. From the Payroll Tab, find the Base Compensation pane.

The Base Compensation Pane, below, shows the employee's current hourly pay, hours they are expected to work, how often the person is paid, and the effective date of their salary. To change their payrate you do not edit their current pay, you add another row. This provides an audit trail of their pay from their hire date and going forward.

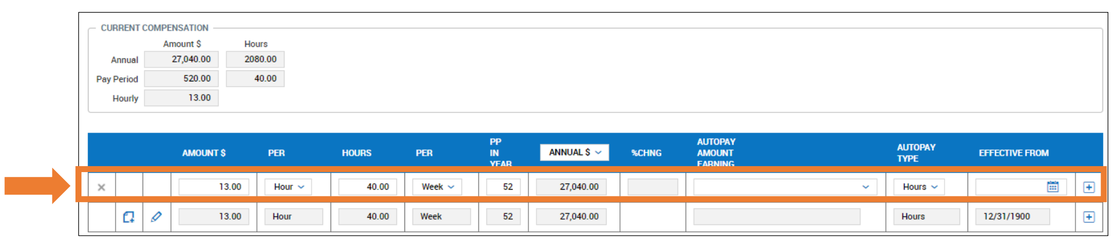


Base Compensation Pane

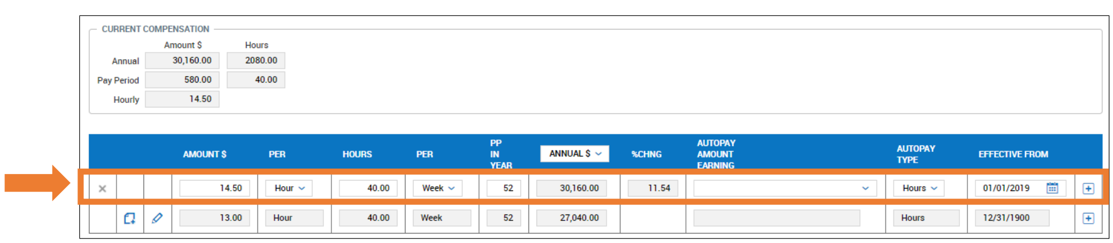
6. Scroll to the right and select the icon to add a new row.



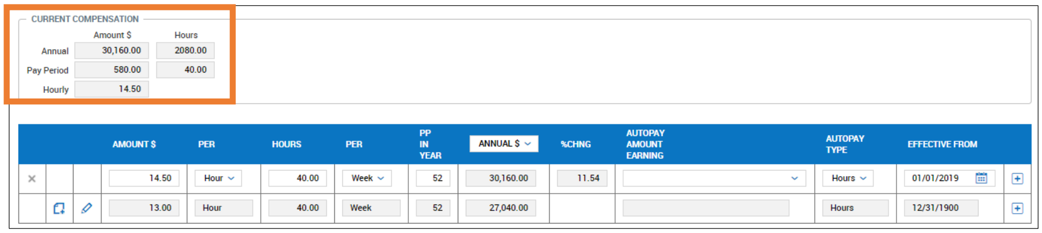
Notice the new row pre-populates with the current data. For our example we will give the employee a raise to $14.50 an hour with a weekly pay frequency.



7. Type in the **AMOUNT** box the new hourly rate to 14.50/hour.
8. Select the following options: Per Hour, Pay Period of Weekly, 52 weeks in a year, and the effective date of the new pay (let's choose 01/01/2019).

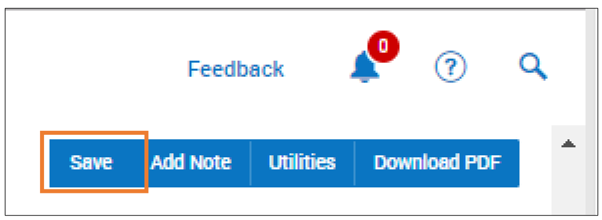


If the change is immediate, the updated information will appear in the Current Compensation area as highlighted in the screen shot below. If the effective date is set to a future date the Base Compensation area will not reflect the new compensation until that date has been reached.



Base Compensation Pane

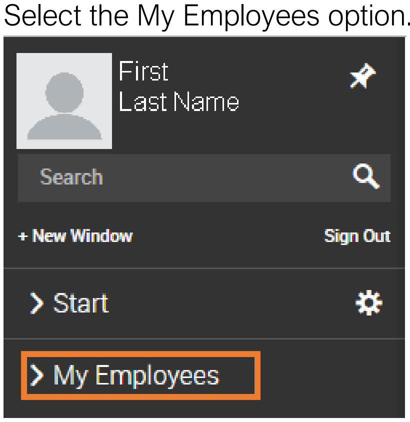
9. Select **Save** at the top right of your window to save your work and you are done.



Example: Updating a Salaried Employee

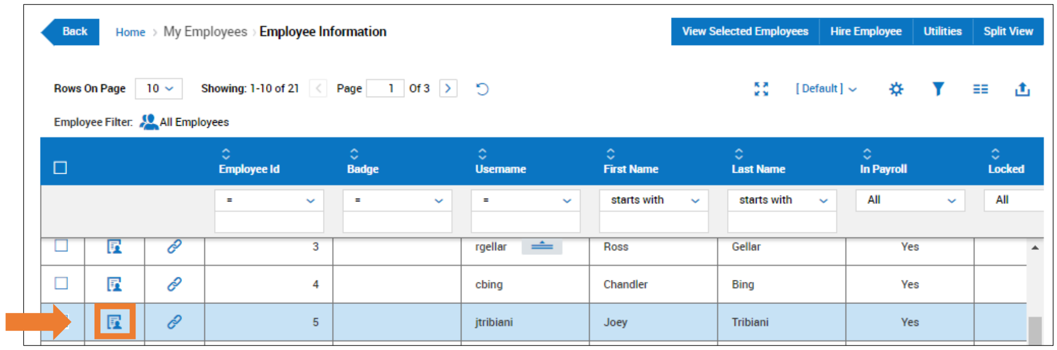
1. Select the Hamburger Menu (highlighted below).

2. Select the My Employees option.



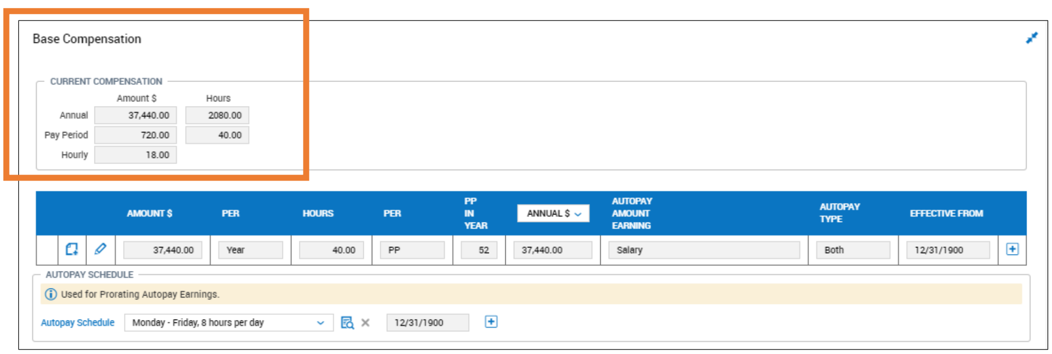
The menu expands.

3. Select Employee Information under My Employees.



Employee Information Pane

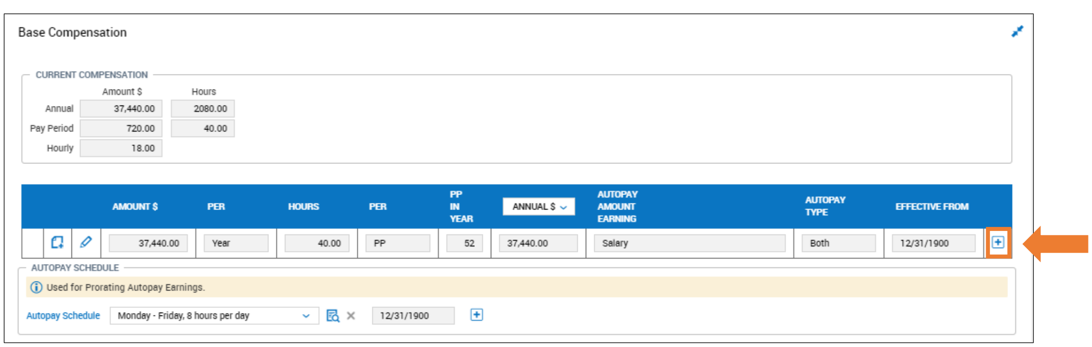
4. Select the icon to select an employee.
5. From the Payroll Tab, find the Base Compensation pane.



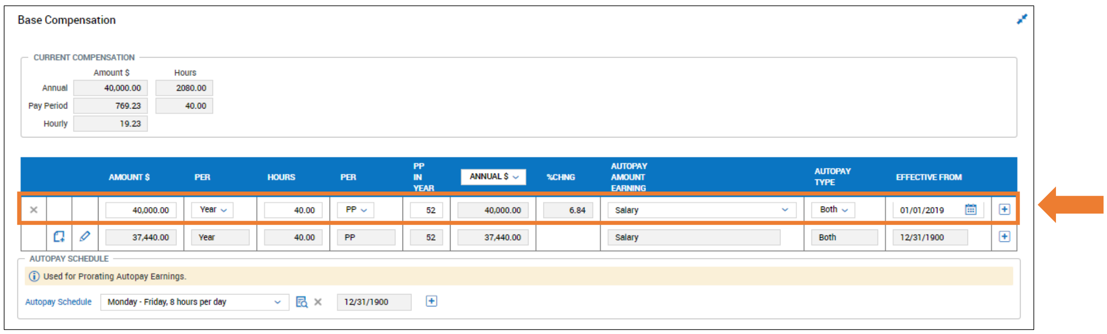
Base Compensation Pane

This pane shows the current annual pay, hours, how often the person is paid, and the effective date of their salary. This employee is paid per paid period. To change their payrate you will need to add another row to the pane and make that the new pay rate. This provides an audit trail of their pay from hire date and going forward.

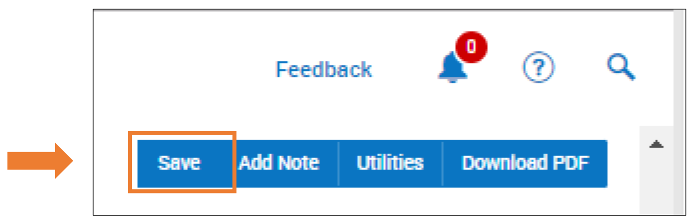
6. Scroll to the right and select the icon to add a new row.



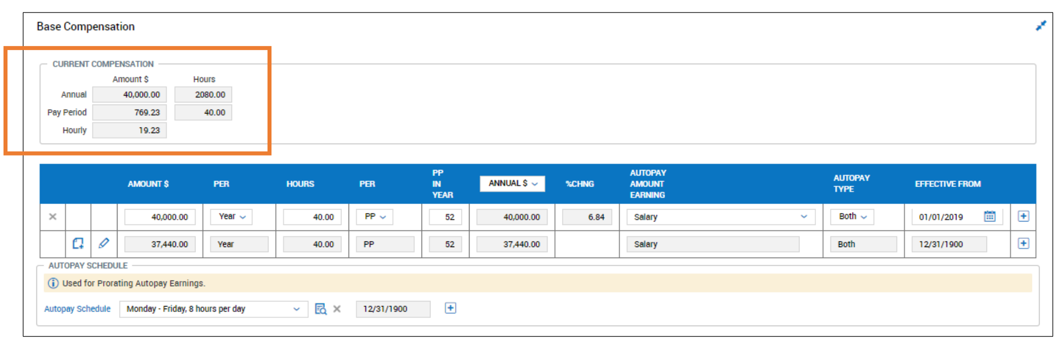
7. Enter 40,000 in the **AMOUNT** box.
8. Select the drop-down that it is **PER** Year.
9. Enter that they work 40 **HOURS** per **PP** (pay period).
10. Ensure that it says there are 52 **PP IN YEAR.**
11. Skip to the **AUTOPAY AMOUNT EARNING** drop-down and select Salary.
    This will ensure that the person is automatically paid their salary every payroll.
12. Select the **AUTOPAY TYPE** as Both.
13. Make the **EFFECTIVE DATE** 01/01/2019.



14. Select **Save** (top right of your screen) to save your work and you are done!



If the change is immediate, the updated information will appear in the Current Compensation area highlighted in the screen shot below. If the effective date is set to a future date the Base Compensation area will not reflect the new compensation until that date has been reached.



Changing Pay Rates in the Middle of a Pay Period

There are times when you will need to change a pay rate for an employee. The pay rate change will be reflected if it occurs in the middle of a pay cycle if they are set up for autopay and are salaried employees. In this case, they are date driven and not pay period driven. However, hourly employees that are tied to time clocks are the same through the first pay cycle and would require a manual adjustment to reflect the change mid pay period cycle.

Pay Period Frequency Defined

Frequency	Definition
Year	Paid once a year.
Month	Paid once a month.
Week	Paid weekly.
PP (Pay Period)	The difference between this and the ones above is mainly regarding deductions. For example, a bonus check will not have the same deductions that a regular paycheck would have because it's not a regular pay check—it's being paid at a random time.

Autopay Amount & Autopay Type Settings

When you are setting up/editing a salaried employee, it is customary to put them on an autopay setting. Autopay is listed twice in the Base Compensation pane and the two fields are tied together. You cannot select one field without the other. What each field means:

- Autopay Earning: This setting ties the pay to the employee's earning code, meaning, is it their regular salary, sick time, vacation, etc.
- Autopay Type: This is what is displayed on the employee's check. You can select amount earned, hours, or both.

Deductions

There are times when you will need to add or change the deductions for an employee. Deductions have been already set up in the system for your company. In the following example, we will add a deduction.

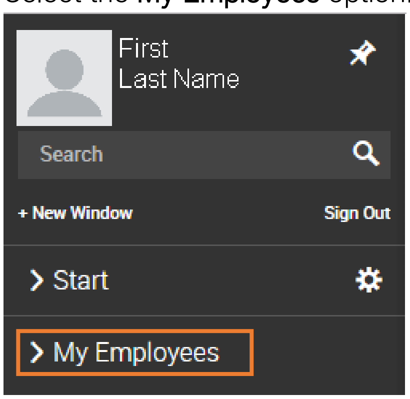
> **Note**: If you are starting a new deduction to replace a current one, you must stop the old deduction first. See Stopping Deductions on page 19.

Example: Adding a Deduction

This employee will now have a new deduction, union dues, applied to their payroll.

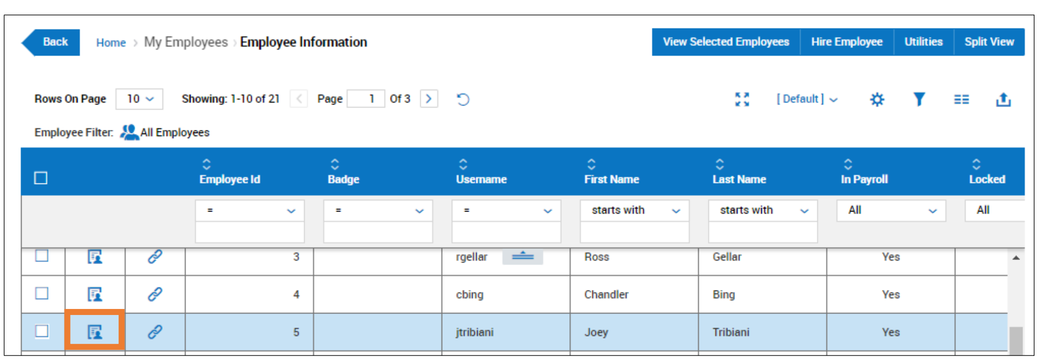
1. Select the **Hamburger Menu** (highlighted below).

2. Select the **My Employees** option.

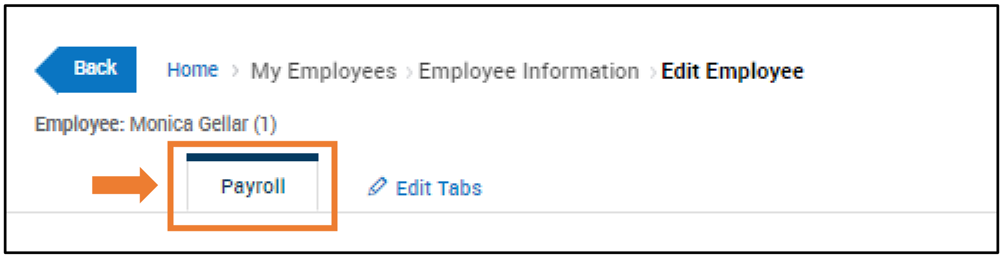


The menu expands.

3. Select **Employee Information** and the following window displays.

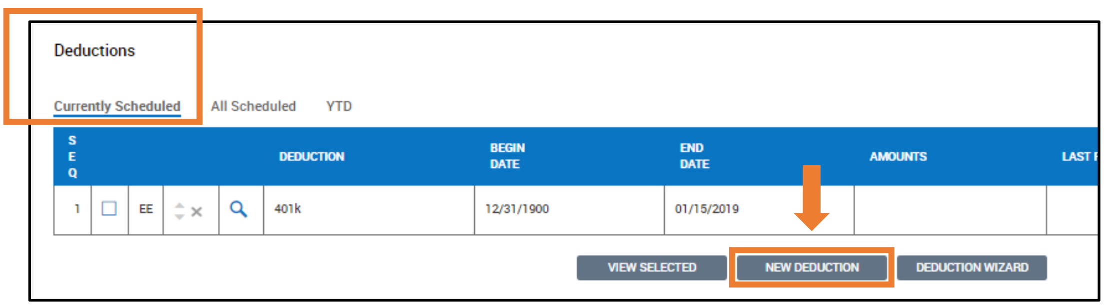


4. Select the icon for the employee's record.
5. Select the Payroll Tab.



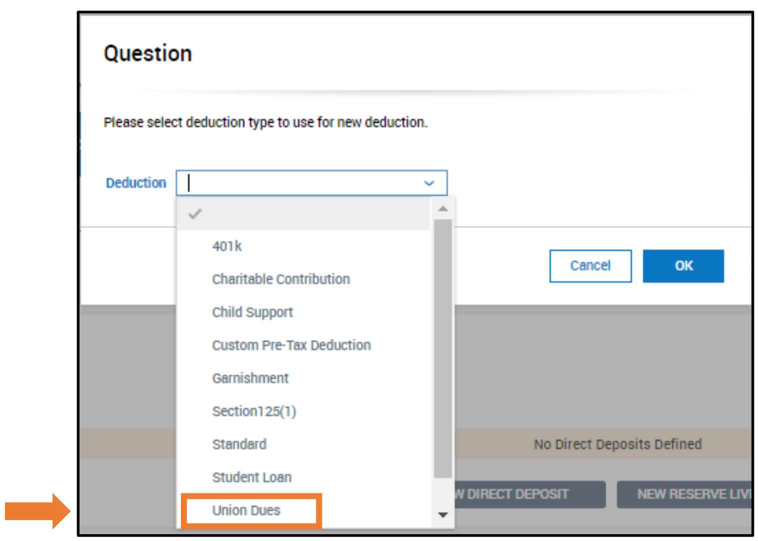
Payroll Tab

6. Go to the Deductions pane.



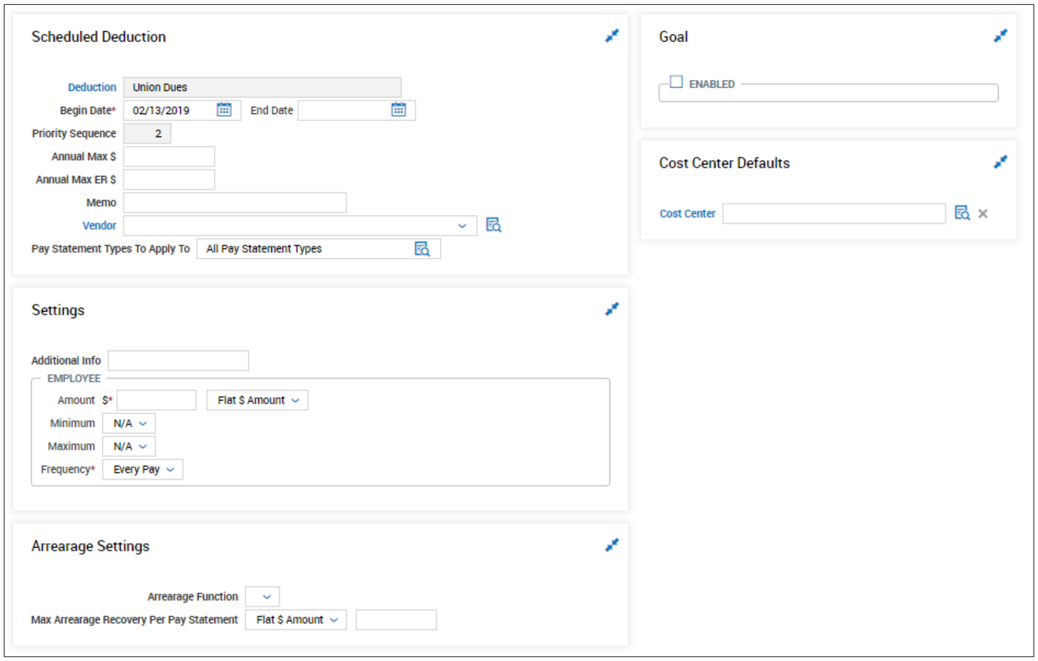
Deductions Pane

7. Select the New Deduction button highlighted in the screenshot above.
8. In the drop-down menu, select Union Dues as shown in the following screenshot.



Selecting a Deduction

9. Select **OK**.



Scheduled Deduction

Deduction Pane Explained

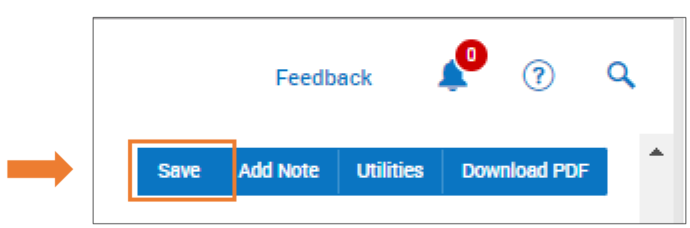
Before we continue, let's review the options in the scheduled deductions pane.

Scheduled Deductions	
Deduction	The deduction we just selected (in this case, Union Dues). It is greyed out because it cannot be edited.
Begin date	This field defaults to today but can be edited to be a future date.
End date	Select an end date, if you do not, it will default to 12/31/9999.
Memo	Add any notes about the new deduction. (Not required)
Vendor	Select any third party for the check disbursement.
Pay Statement Types	The default is All Pay Statement Types but others can be configured.

Settings	
Employee Amount	Enter a value to be deducted. (This is a required field)
Amount Dropdown	There are several varieties of how that number can be calculated—flat rate or based on a certain percentage. If you select the drop-down you will see the many options.
Frequency	This is typically set to Every Pay. But, there are many other options available in that drop-down which include by date, manual deduction, or only scheduled pays. (Scheduled pay means that the deduction will not occur on special payments like bonuses since those are typically not a scheduled pay).

Arrearage Settings	
Arrearage Function	Establishes how the system handles deductions when there are insufficient earnings to withhold the scheduled deduction. • Discard Underfunded Amount: When there are insufficient earnings to withhold the full deduction amount, the underfunded amount will be discarded. The employer can choose to ‘forgive’ this amount or enter a manual adjustment to recover the amount from the employee on the next available pay statement. • Arrear the Underfunded: When there are insufficient earnings to withhold the full deduction amount, the underfunded amount will be moved to the Adjustments section of the employee’s file to be recovered on the next pay statement with enough earnings. • Discard the Entire EE Deduction: When there are insufficient earnings to withhold the entire deduction amount, the entire deduction amount will be discarded. The employer can choose to ‘forgive’ this amount or enter a manual adjustment to recover the amount from the employee on the next available pay statement. • Arrear the Entire EE Deduction: When there are insufficient earnings to withhold the full deduction amount, the entire deduction amount will be moved to the Adjustments section of the employee’s file to be recovered on the next pay statement with enough earnings.
Max Arrearage Recover Per Pay Statement	Select how to recover the arrearage per pay period. Options are: • Flat $ Amount • % of Gross Earnings • % of Earnings List

10. Apply all the appropriate deduction values in Scheduled Deduction and Settings
11. Select **Save** and your work is complete.



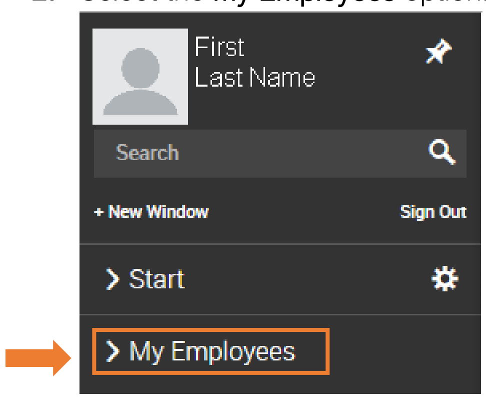
Special Note: To create a Goal for your deduction you need to save the deduction first. Goals are not required.

Setting a Deduction Goal

After adding a deduction, and you save your work, you can establish Goals for the deduction. For example, maybe the employee only needs to pay a certain amount each year for union dues (or any other type of deduction). If you create a goal, and that goal is reached, the deduction will no longer occur on the employee's record.

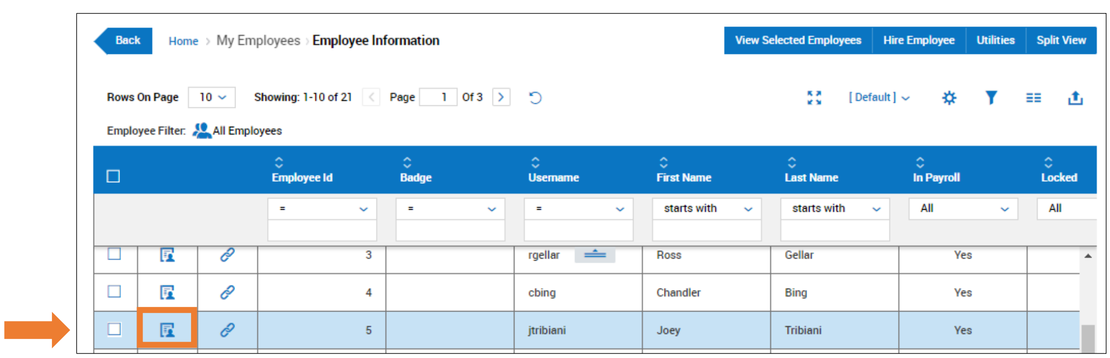
1. Select the **Hamburger Menu** (highlighted below).

2. Select the **My Employees** option.

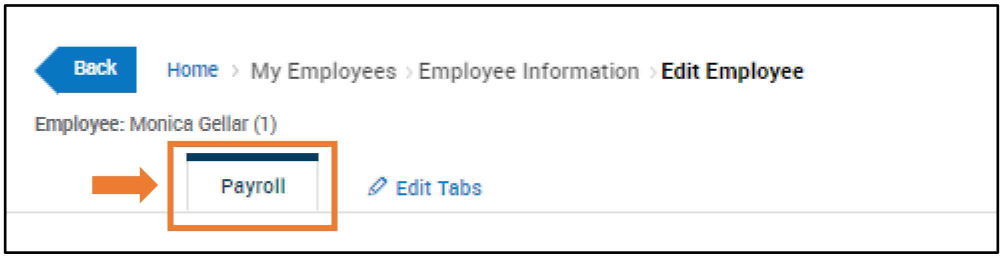


The menu expands.

3. Select **Employee Information** and the following window displays.

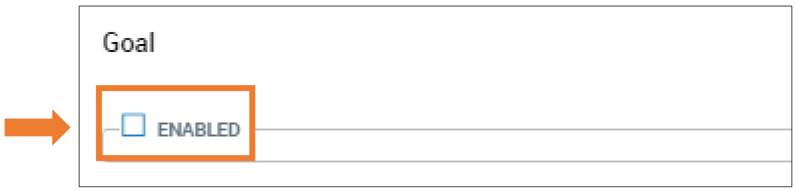


4. Select the icon for the employee's record.
5. Select the Payroll Tab.

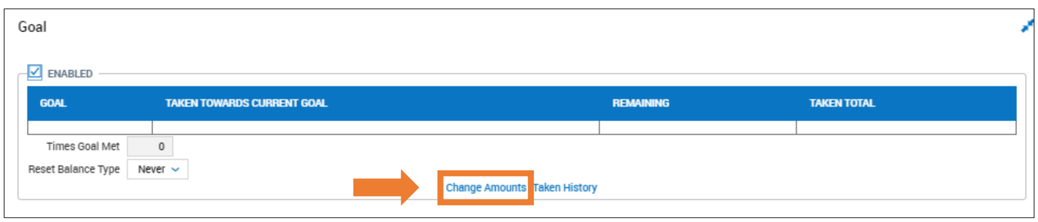


Payroll Tab

6. Under Goal, select the Enabled checkbox.

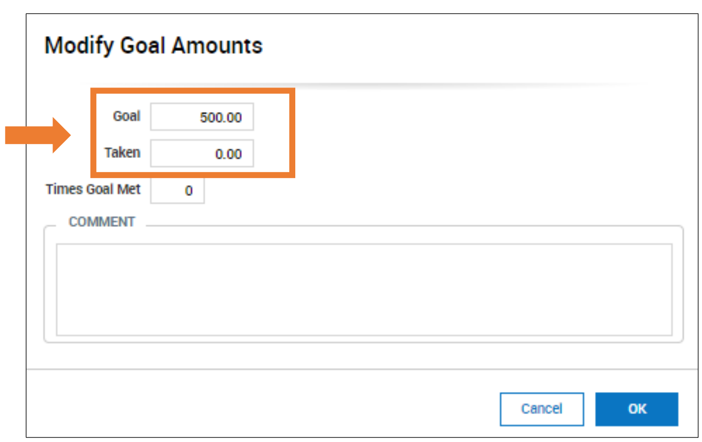


7. To start a new goal deduction, select the text link, **Change Amounts**.



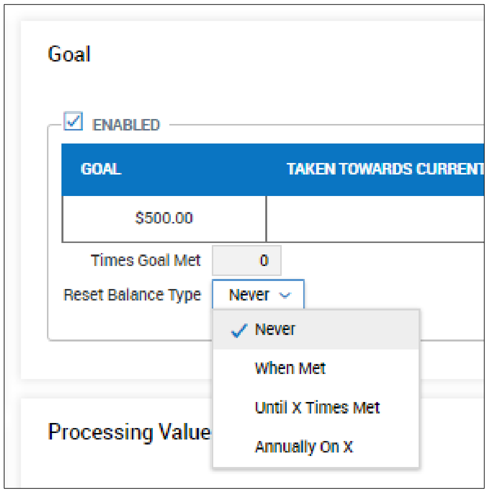
8. In the next dialog box, enter the goal amount, if any amount has previously been taken, and any comments (not required) in the dialog box.

> **Note**: The field, Taken, would be used if the deduction goal was not set up and the deduction had previously taken. This would reduce the overall goal for the employee by the amount already taken.

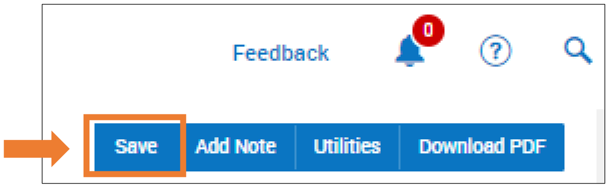


9. Select **OK**.

After setting your goal, you can choose how often the goal should be reset for the employee from the **Reset Balance Type** drop-down menu.



15. After setting up the goal, select Save to Save your work.

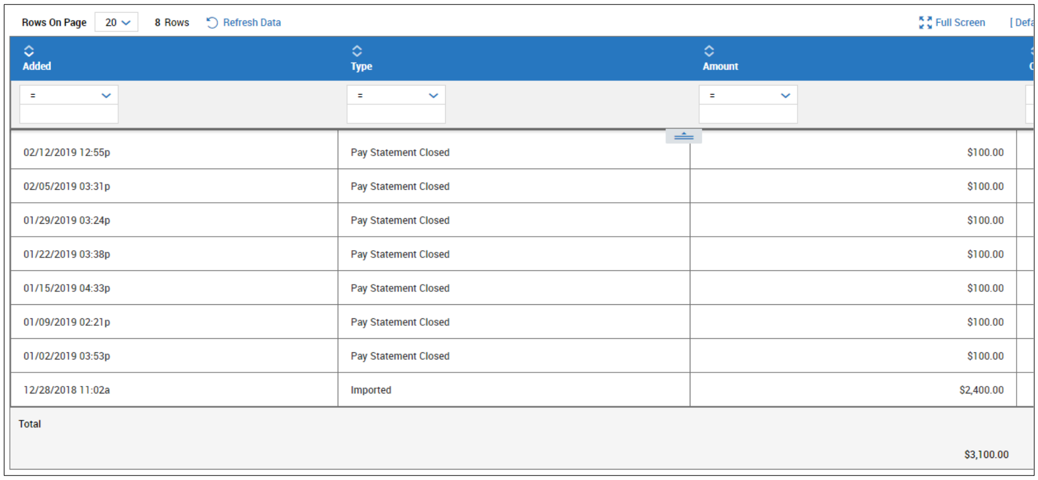


Reviewing Deduction History

If deductions have been previously taken, and you want to adjust the goal by those amounts, you must review the current deduction history.

1. From the Goal Pane, select the **Enabled** checkbox as highlighted below.

2. Select **Taken History** as highlighted in the screenshot above.

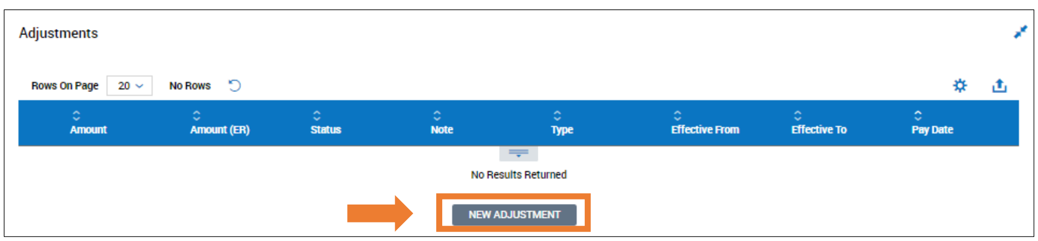


Added	Type	Amount
02/12/2019 12:55p	Pay Statement Closed	$100.00
02/05/2019 03:31p	Pay Statement Closed	$100.00
01/29/2019 03:24p	Pay Statement Closed	$100.00
01/22/2019 03:38p	Pay Statement Closed	$100.00
01/15/2019 04:33p	Pay Statement Closed	$100.00
01/09/2019 02:21p	Pay Statement Closed	$100.00
01/02/2019 03:53p	Pay Statement Closed	$100.00
12/28/2018 11:02a	Imported	$2,400.00
Total		$3,100.00

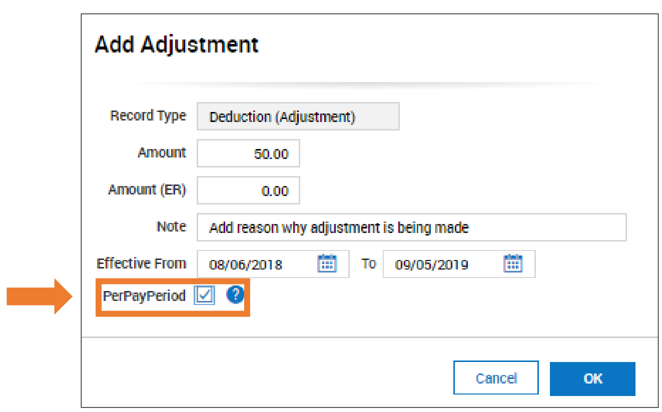
Deduction Adjustments

In the event you need to make an adjustment to someone's deductions, go to the Adjustment Pane.

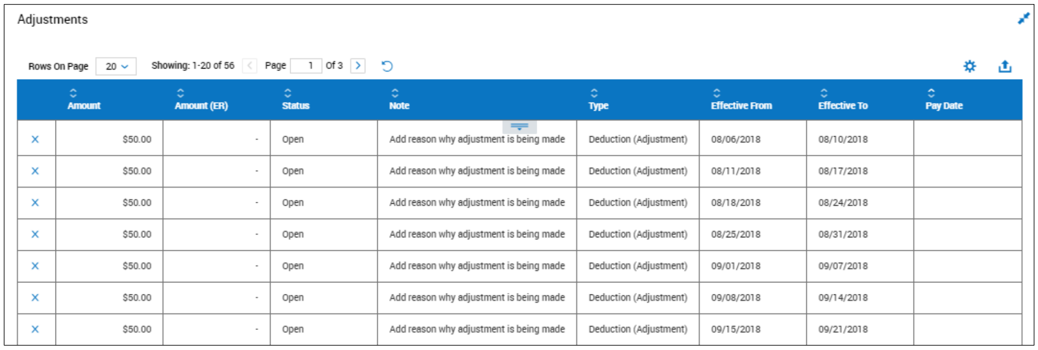
1. Scroll to the Deductions Pane.
2. Scroll to the Adjustments Pane.
3. Select **New Adjustment** (highlighted in the screenshot below).



4. Fill out the Add Adjustment popup.
   (**Amount** is required, **Effective to/from dates** are required, and select **PerPayPeriod** if the adjustment is to happen for every scheduled paycheck versus any time a check is cut to the employee).



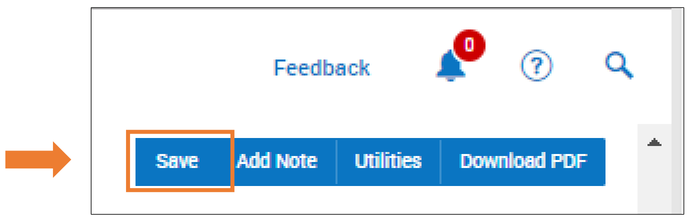
5. Select the **OK** button.
   The adjustments will now be listed as shown below.


Adjustments

Rows On Page 20 Showing: 1-20 of 56 Page 1 of 3

	Amount	Amount (ER)	Status	Note	Type	Effective From	Effective To	Pay Date
×	$50.00	-	Open	Add reason why adjustment is being made	Deduction (Adjustment)	08/06/2018	08/10/2018	
×	$50.00	-	Open	Add reason why adjustment is being made	Deduction (Adjustment)	08/11/2018	08/17/2018	
×	$50.00	-	Open	Add reason why adjustment is being made	Deduction (Adjustment)	08/18/2018	08/24/2018	
×	$50.00	-	Open	Add reason why adjustment is being made	Deduction (Adjustment)	08/25/2018	08/31/2018	
×	$50.00	-	Open	Add reason why adjustment is being made	Deduction (Adjustment)	09/01/2018	09/07/2018	
×	$50.00	-	Open	Add reason why adjustment is being made	Deduction (Adjustment)	09/08/2018	09/14/2018	
×	$50.00	-	Open	Add reason why adjustment is being made	Deduction (Adjustment)	09/15/2018	09/21/2018	

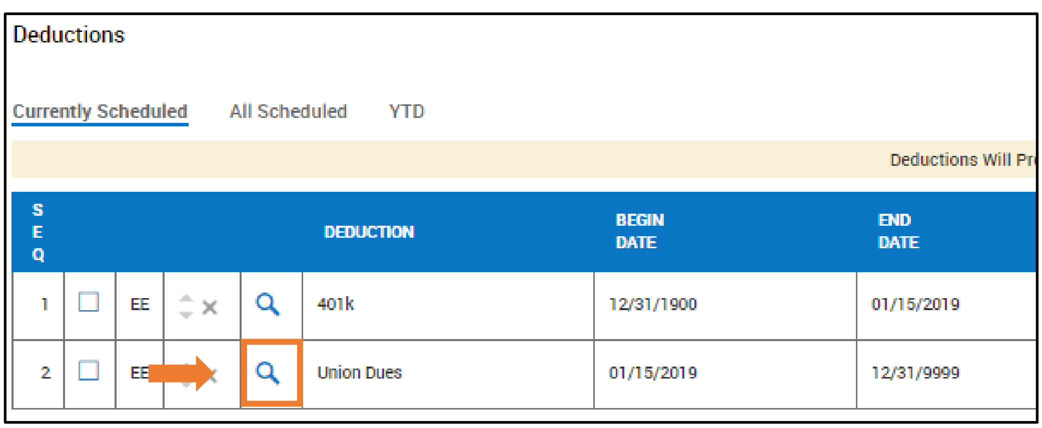
5. Select **Save** from the top right of your screen to save your work.



Stopping Deductions

Let's assume that our employee no longer has to pay union dues. We need to stop their dues that are currently being taken out of their paycheck. Also, if we are changing a deduction, we need to stop the current deduction first and then add the new deduction.

1. Select the magnifying glass, highlighted in the screenshot below, next to the deduction that you want to stop.


Deductions

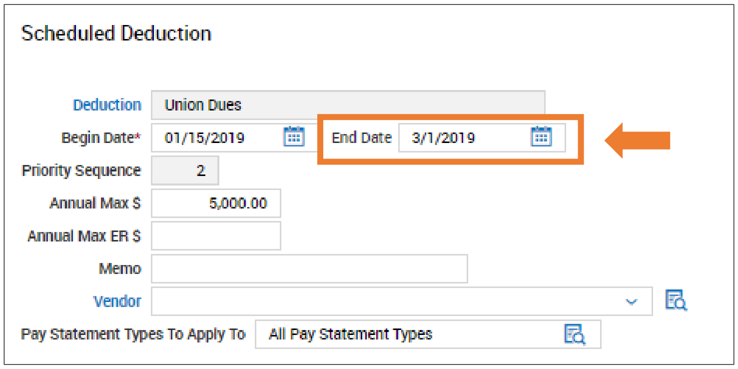
Currently Scheduled All Scheduled YTD

Deductions Will Pr

SEQ					DEDUCTION	BEGIN DATE	END DATE
1	☐	EE			401k	12/31/1900	01/15/2019
2	☐	EE			Union Dues	01/15/2019	12/31/9999

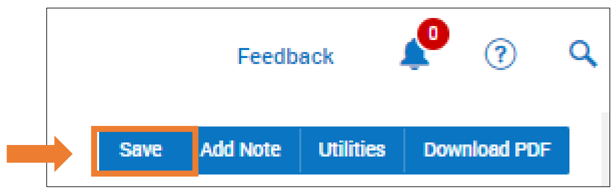
Deductions Pane

2. Enter an End Date, highlighted in the screenshot below.



Scheduled Deductions

3. Select the **Save** button on the top right corner to save your work.



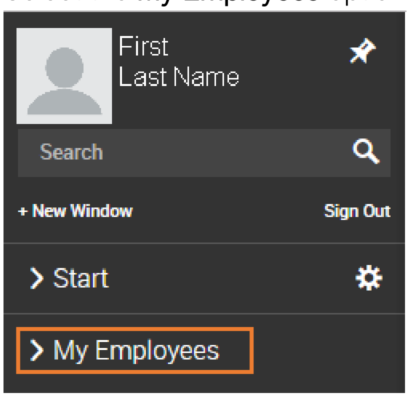
Employee Tax Setup

Tax Options: Federal

The system default for Federal taxes is set to single with zero exemptions.

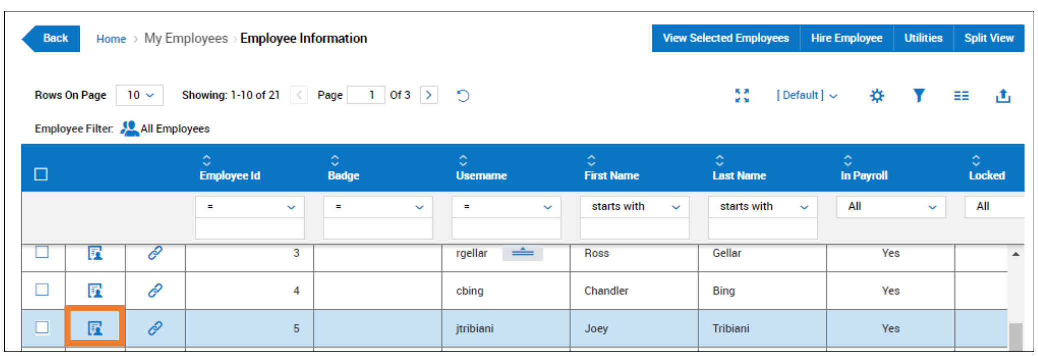
1. Select the **Hamburger Menu** (highlighted below).

2. Select the **My Employees** option.

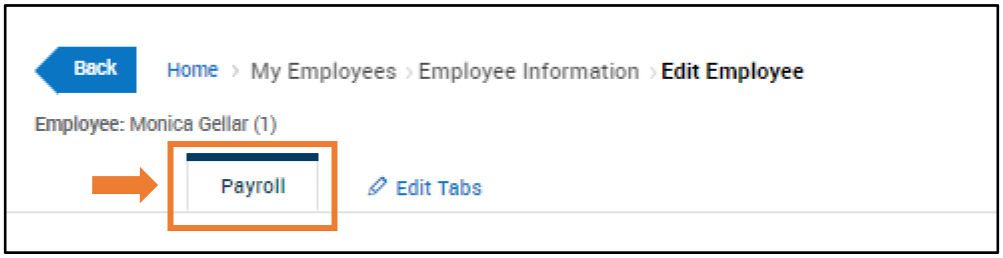


The menu expands.

3. Select **Employee Information** and the following window displays.

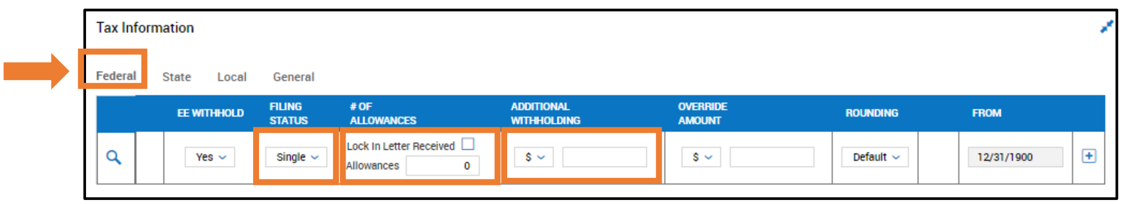


4. Select the icon next to the employee you want to set up from the employee list.
5. Select the **Payroll Tab**.



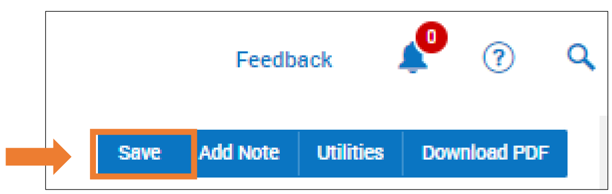
Payroll Tab

6. Scroll down to the Tax Information pane.
7. Select the **Federal Tab** (if not already selected).
8. In the pane, shown below, enter the new **Filing Status**, **# of Allowances**, and **From** date. *Allowances are commonly referred to as exemptions.*
9. If an employee has additional withholdings enter this number in the additional withholding section.



Tax Information

10. Select the **Save** button on the top right corner to save your work.

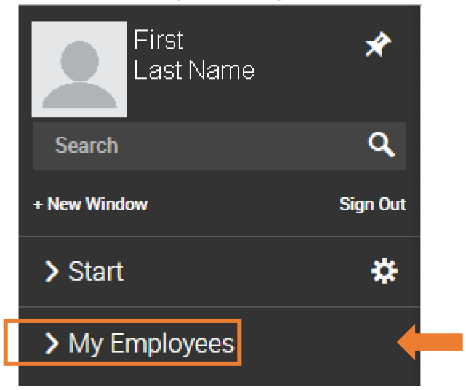


Tax Options: State Tax Allowance Changes

For example, an employee gets married and has a child. They want to change their exemptions (allowances) from zero to three.

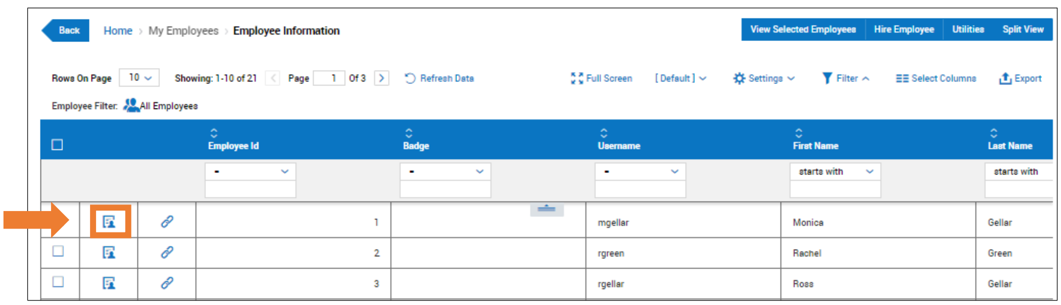
1. Select the **Hamburger Menu** (highlighted below).

1. Select the **My Employees** option.



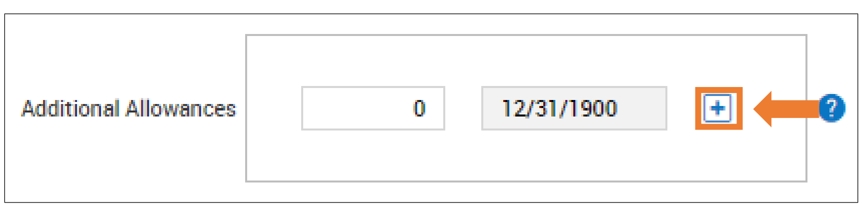
The menu expands.

2. Select **Employee Information** under My Employees.



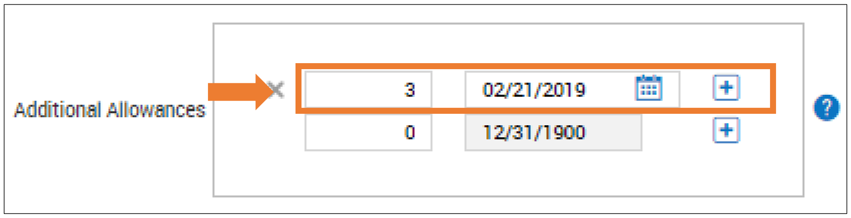
Employee Information Pane

3. Select the icon to select an employee.
4. Select the **Payroll** tab and scroll down to the Tax Information pane
5. Select the **State** tab.
6. Select the icon in the Additional Allowances pane as shown below.



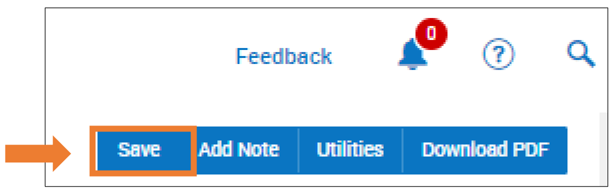
Additional Allowances: State

7. Enter the new number of allowances in the new row created.



Additional Allowances: State: New Row

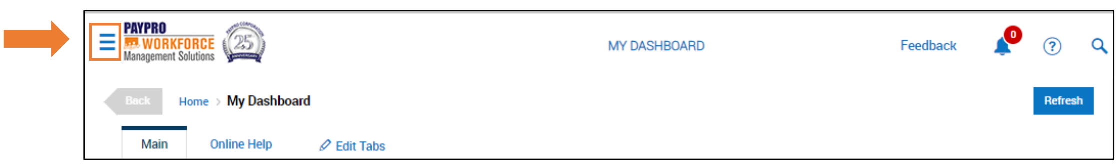
8. Enter the **effective date**.
9. Select the **Save** button on the top right corner to save your work.



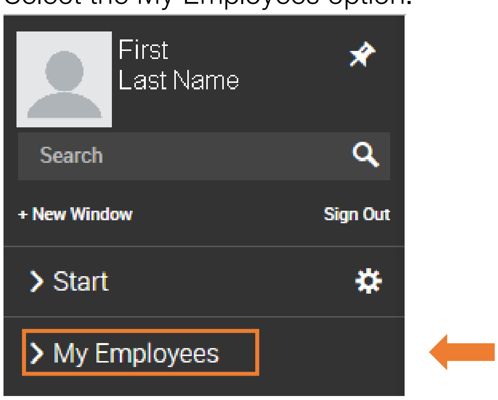
Tax Codes: Unemployment

The system can be set up to default to a particular company home location, however if you have multiple locations you will need to select the appropriate state based on where the employee works.

1. Select the Hamburger Menu (highlighted below).

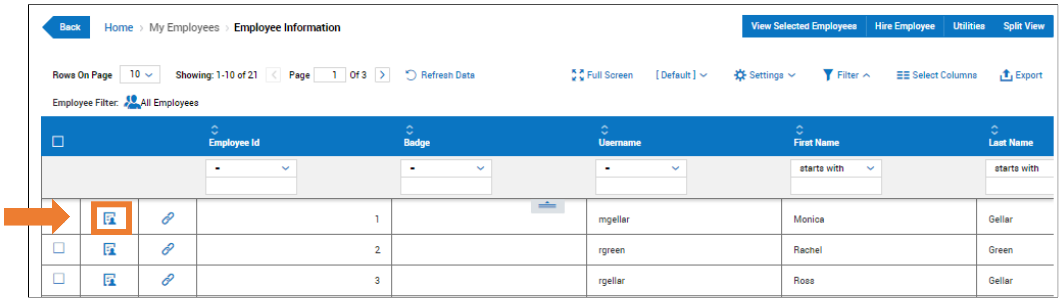


2. Select the My Employees option.



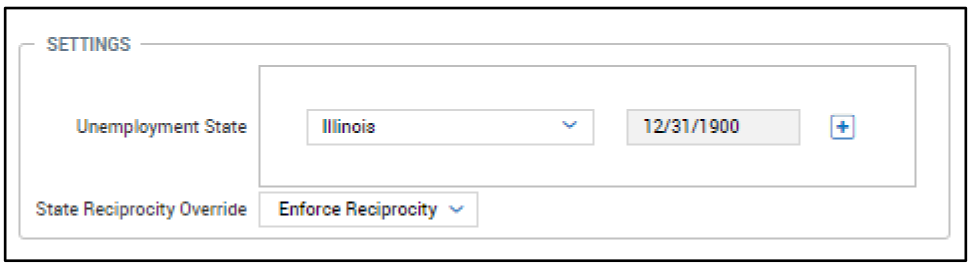
The menu expands.

3. Select Employee Information under My Employees.



Employee Information Pane

4. Select the icon next to the employee you want to set up from the employee list.
5. Select the **Payroll tab** and scroll down to the Tax Information pane.



Unemployment Pane

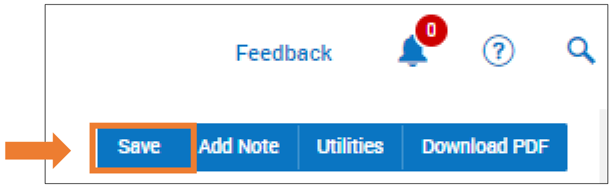
6. Select the Unemployment State drop-down menu and select the appropriate state for the employee.

State Reciprocity Override

The default is set to Enforce Reciprocity. However, several settings will override reciprocity rules.

Option	Explanation
Enforce Reciprocity	The tax engine calculates the correct taxes.
Resident Only	If this option is selected, only the Resident state income tax is withheld.
Non-Resident Only	If this option is selected, only Non- Resident state income tax is withheld.
Zero in Both	If this option is selected, there will be no state income tax withheld for both Resident and Non- Resident states.
Full	If this option is selected, then state income tax is withheld in both the Resident and Non- Resident states.
Diff	The greater of the difference in state income tax (SIT) withholding is withheld based on calculated SIT. For example, an employee lives in MO but works in IL. MO SIT calculates at $100 and IL SIT calculates at $75. In this case, $25 would be withheld in MO SIT and $75 in IL SIT.

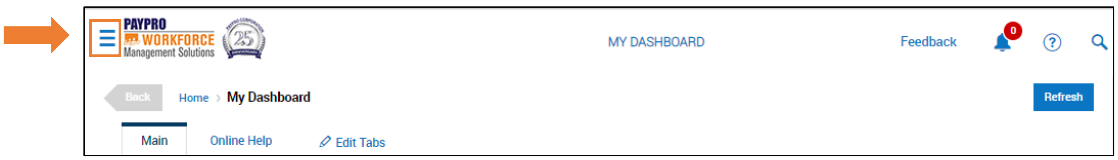
7. Select the **Save** button on the top right corner to save your work.



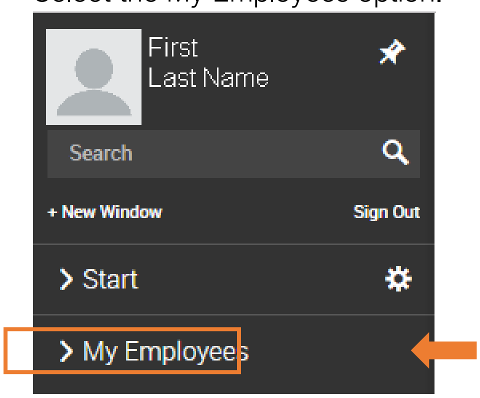
View W2 Forms

All W2s that have been prepared for each employee and tax year are available for your review.

1. Select the Hamburger Menu (highlighted below).

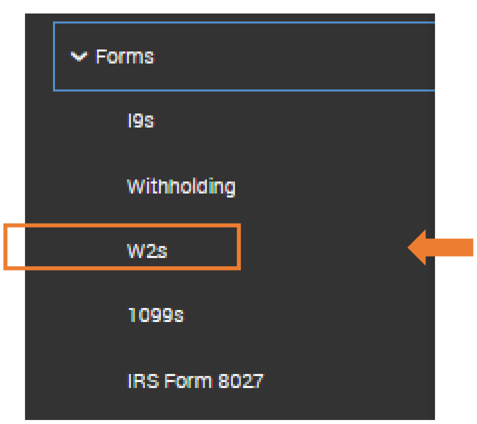


2. Select the My Employees option.



The menu expands.

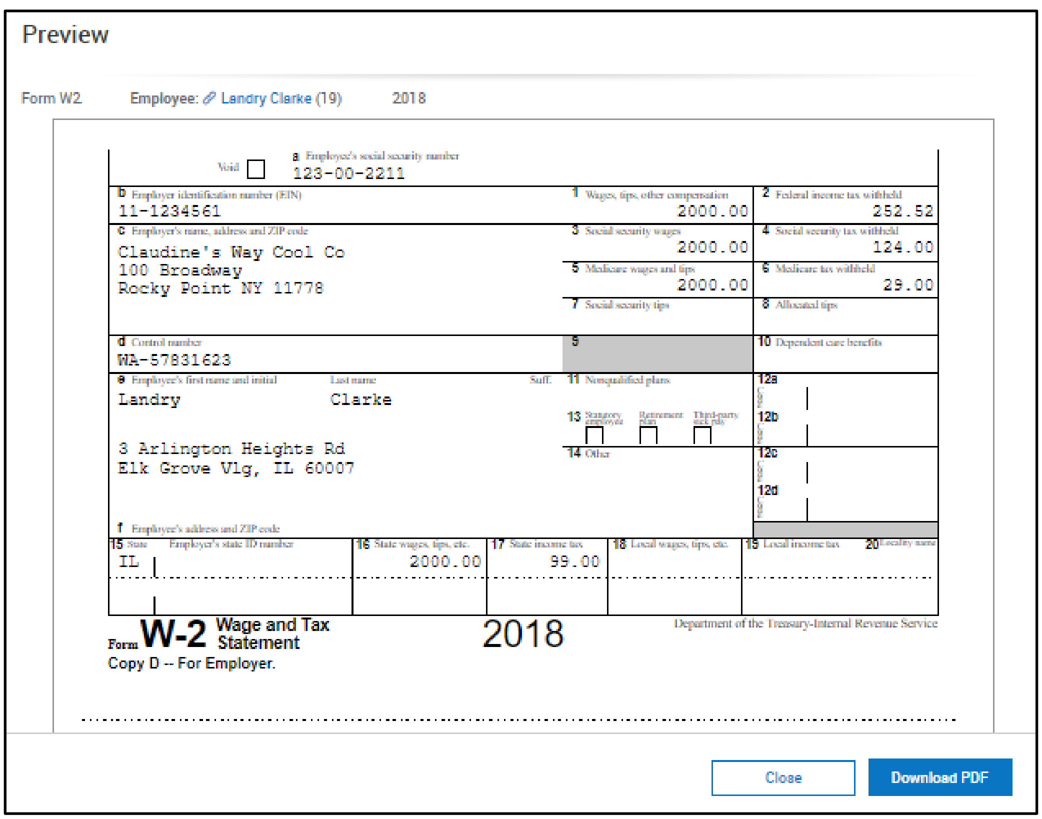
3. Select Forms, and then W2s option.



Employee Listing

Special Note: There are two columns with the same icon . One is copy D (or for the employer) and one is the W2 which are the copies for the employee. If you hover over the icons it will tell you which column is which.

4. Select the and view the employee's W2.



5. Select Download PDF or Close.

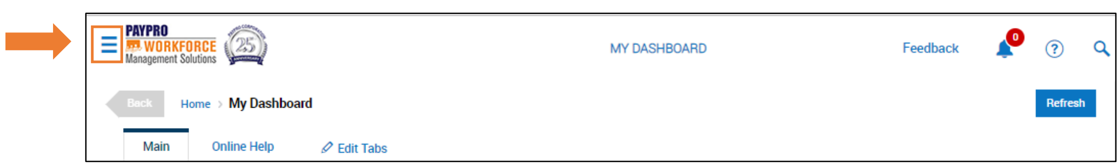
Direct Deposit

Adding direct deposit is done from the employee's payroll information screen. Below we will show a demonstration on how to set up a direct deposit. Fields in the direct deposit window are detailed in the table below.

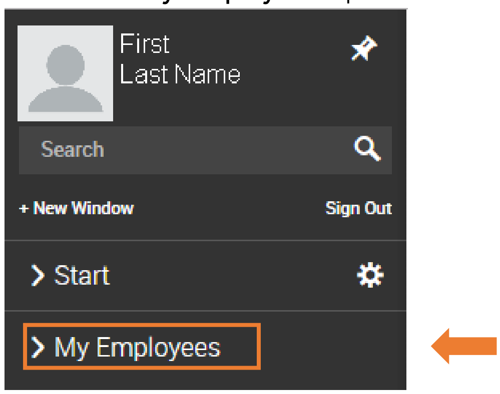
Field	Description
SEQ	The sequence number refers to the order in which the funds are dispersed. It is assigned by the system based by entry. The order can be changed by clicking the up and down arrows. The system will apply the direct deposits in the displayed order as long as there are funds available. After reaching the limit on funds the balance is applied to Entire/Remainder. *Special Note: Entire/Remainder calculation method will always be the last direct deposit item sequence*.
Active From	Enter the effective date for the direct deposit item.
Active To	Enter the end date for the direct deposit item.
Type	This field defaults to Direct Deposit when the New Direct Deposit button is clicked.
Calc Method	There are four direct deposit calculation method options available: Entire/Remainder, Flat $ Amount, % of Gross Earnings, and % of Net Pay.
Account Type	Select Checking or Savings from the drop-down menu.
ABA # Bank Routing #	The routing number the financial institution uses. After entering the routing number, select the **VALIDATE** button to ensure you have the correct number and financial institution.
Account #	Enter the employee's bank account number at the financial institution.

Example: Add new Direct Deposit

1. Select the Hamburger Menu (highlighted below).

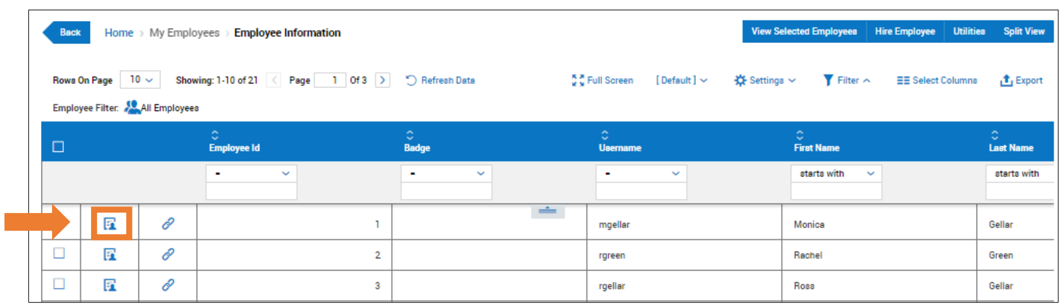


2. Select the **My Employees** option.



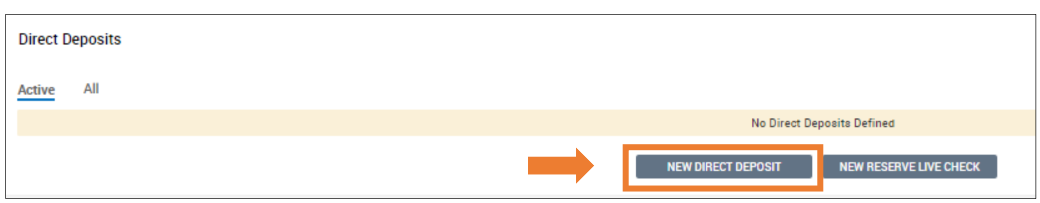
The menu expands.

3. Select **Employee Information** under My Employees.

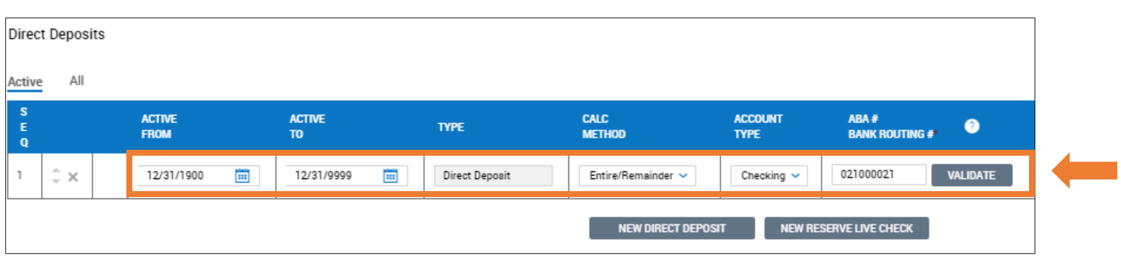


Employee Information Pane

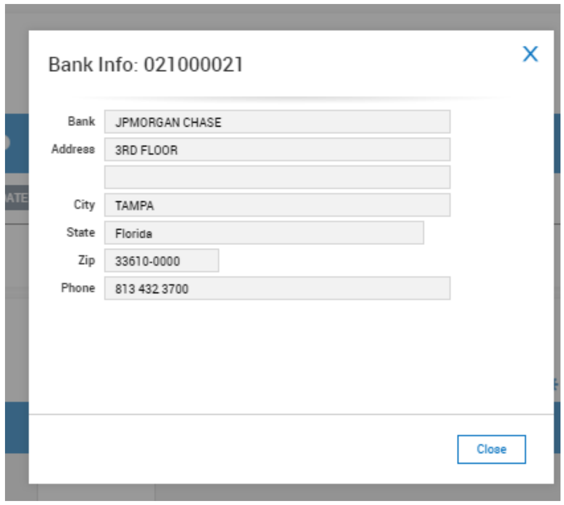
4. Select the icon to select an employee.
5. Select the **Payroll** tab and scroll down to the Direct Deposit pane
6. Select **New Direct Deposit.**



7. Enter in the **ACTIVE FROM** date, **ACTIVE TO** (12/31/9999 is indefinite end), **CALC METHOD** (in this case, Entire/Remainder), **ACCOUNT TYPE**, **ABA# (BANK ROUTING#)**.



8. Select **VALIDATE** and this immediately will let you know that the routing number is correct.



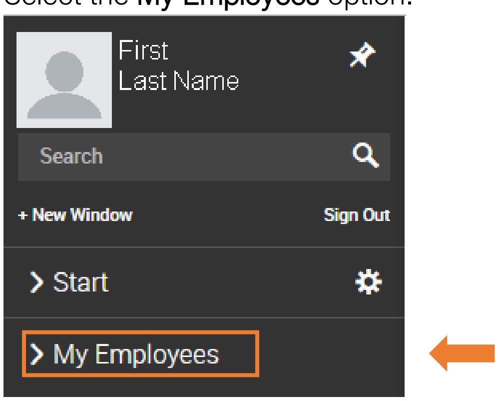
9. Select Close.

Add Partial Direct Deposit

There are times that an employee wants part of their pay to go to one account and the remainder to go to another account. The example below shows you how.

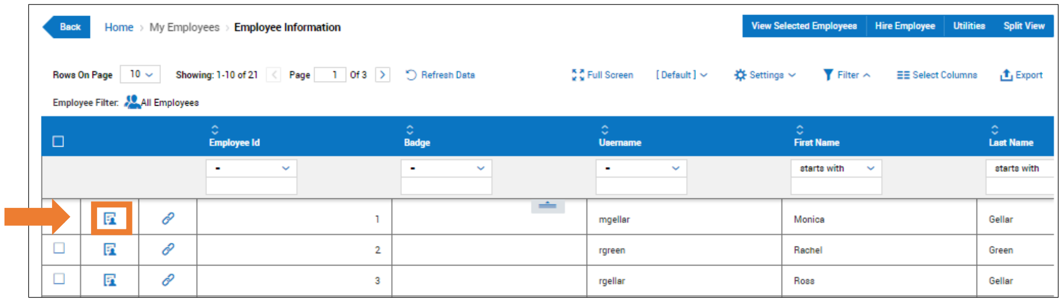
1. Select the Hamburger Menu (highlighted below).

2. Select the **My Employees** option.



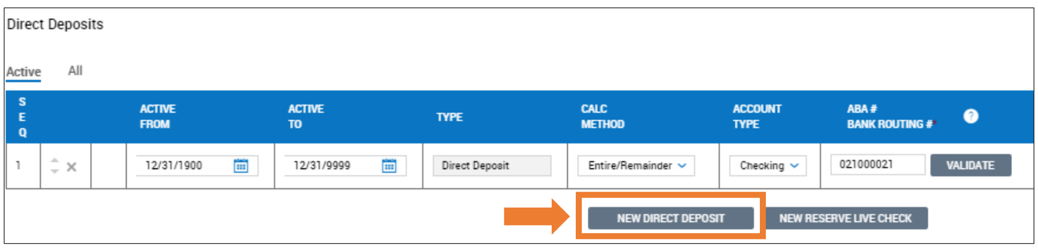
The menu expands.

3. Select **Employee Information** under My Employees.

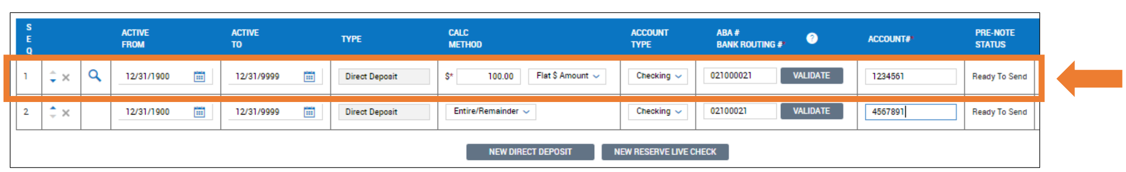


Employee Information Pane

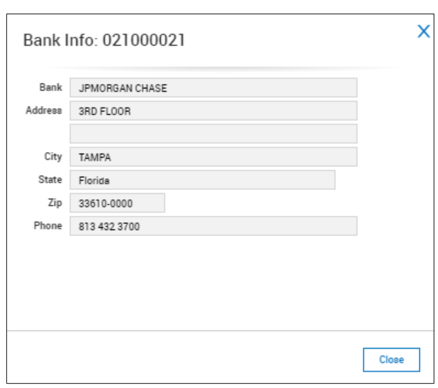
4. Select the icon to select an employee.
5. Select the **Payroll** tab and scroll down to the Direct Deposit pane
6. Select **New Direct Deposit.**



7. Enter in the **ACTIVE FROM** date, **ACTIVE TO** (12/31/9999 is indefinite end), **CALC METHOD** (in this case, 100.00, Flat $ Amount), **ACCOUNT TYPE**, **ABA# (BANK ROUTING#).**



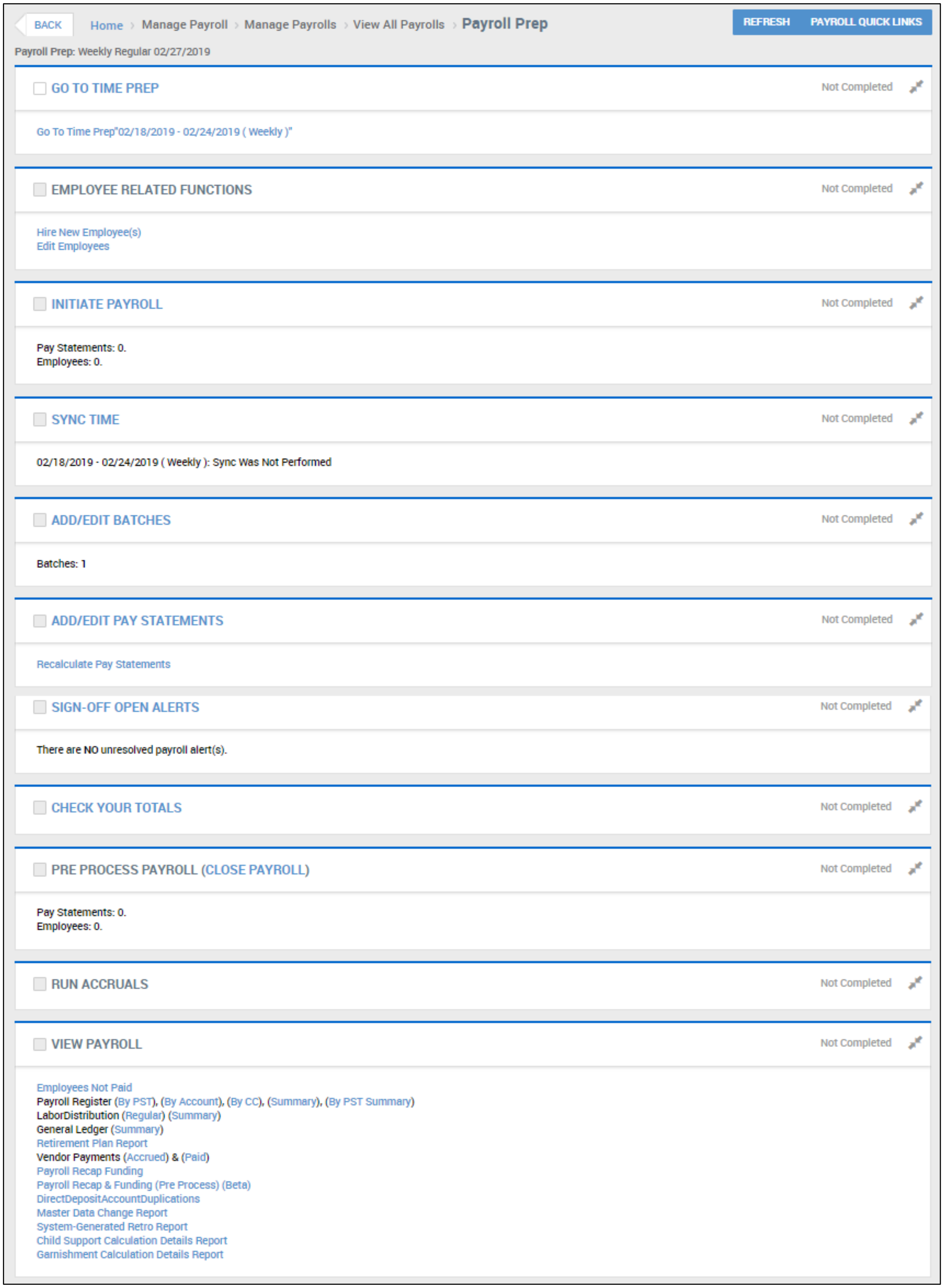
8. Select **VALIDATE** and this immediately will let you know that the routing number is correct.



9. Select Close.

Starting the Payroll Process

Each step that needs to be completed is listed in the payroll prep window (shown on the next page). There is a check box located to the left of each step. Please note, the check box is for personal use only (like crossing an item off your to-do list). It doesn't actually have a function—checking the box will not perform the action. To proceed through the steps, select anything highlighted in blue, which is a hyperlink, and complete your steps.

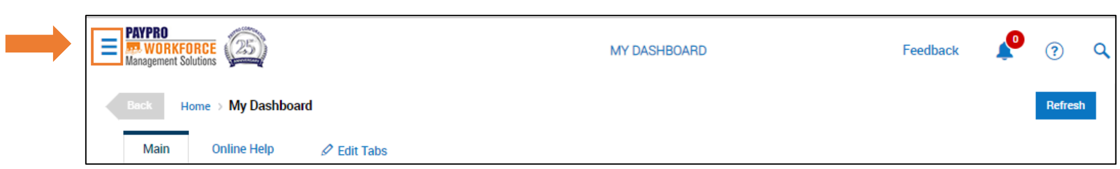


Payroll Prep Window

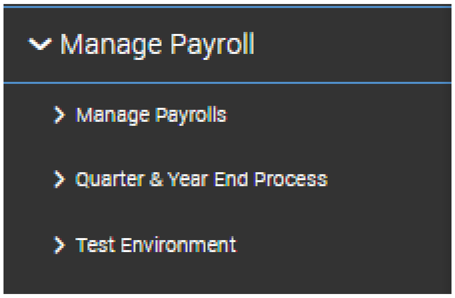
Payroll Prep Window Explained	
Employee Related Functions	Click this to hire new employees or edit employee information for last minute changes not yet entered on the employee level.
Initiate Payroll	Under Options choose the check box All on Assigned Pay Period and PST Type – Regular.
Create Now	The system will bring in all Active employees and create pay statements.
Sync Time	Select the checkbox next to the applicable payroll and select **Sync Time** from the toolbar. (This step will bring the timesheets into the system)
Add/Edit Batch	This screen is used to key in the payroll. OPEN the batch by selecting the pad & pencil Icon. After you **Save & Update** you need to **CLOSE** the Batch by selecting **Close Batch** from the toolbar.
Add/Edit Pay Statements	Select the link to enter detailed changes to one or more employees. To add a second check for an employee, select **New Pay Statement** and select **Regular 2** as the Pay Statement Type.
Sign-Off Open Alerts	This function alerts you to a payroll error. Click the link to view the error. To sign-off on these alerts mark the flag next to the error.
Check Your Totals	This report displays your payroll totals in summary format.
Preprocess Payroll (Close Payroll)	Close the payroll after all entries are complete. This will prevent any further editing. However, you ***can*** re-open the payroll before submitting and make changes.
View Payroll Section	Displays payroll reports you can view and export to reconcile the payroll. The "Employees Not Paid" report is highly recommended.
Submit Payroll	Select this link to send the payroll to Paypro. You will receive an email to inform you the payroll was finalized.

Keying a Payroll

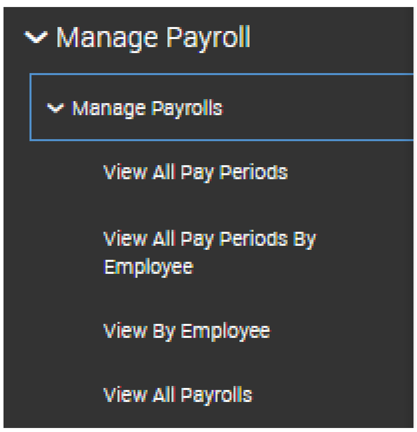
1. Select the **Hamburger Menu** (highlighted below).



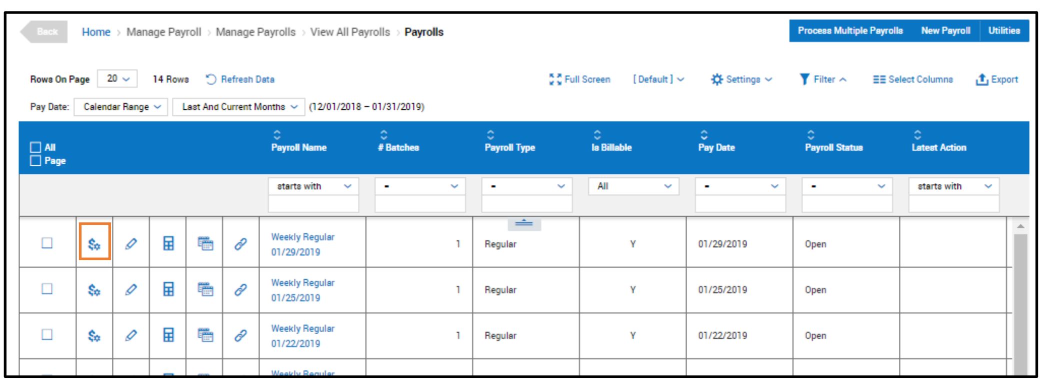
2. Select **Manage Payroll.**



3. Select Manage Payrolls.
4. Select View all Payrolls.

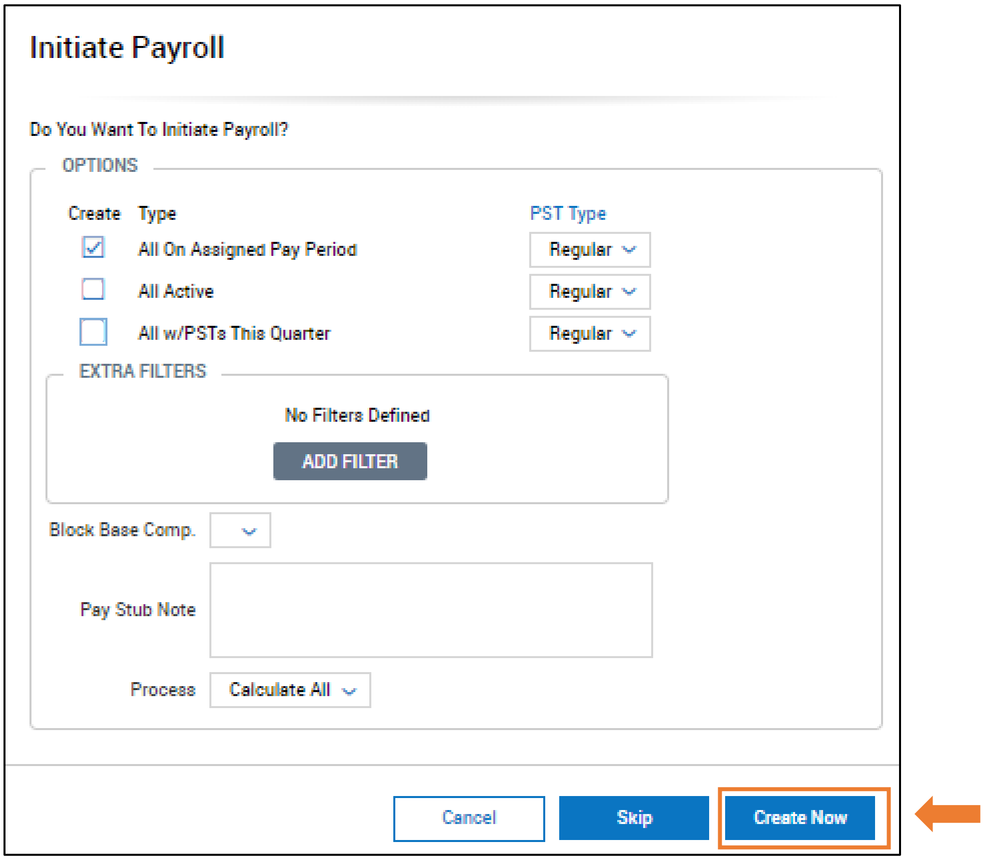


5. Select the icon for the most current payroll to initiate the payroll process.



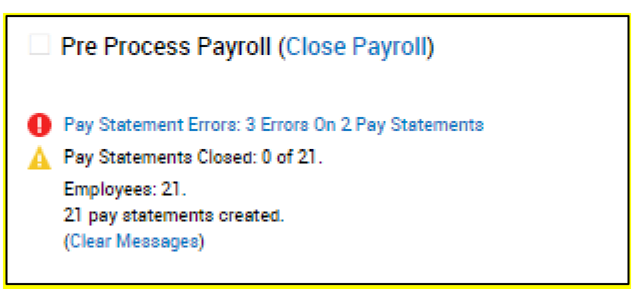
Payroll

6. Select the Hyperlinked words, **Initiate Payroll**.

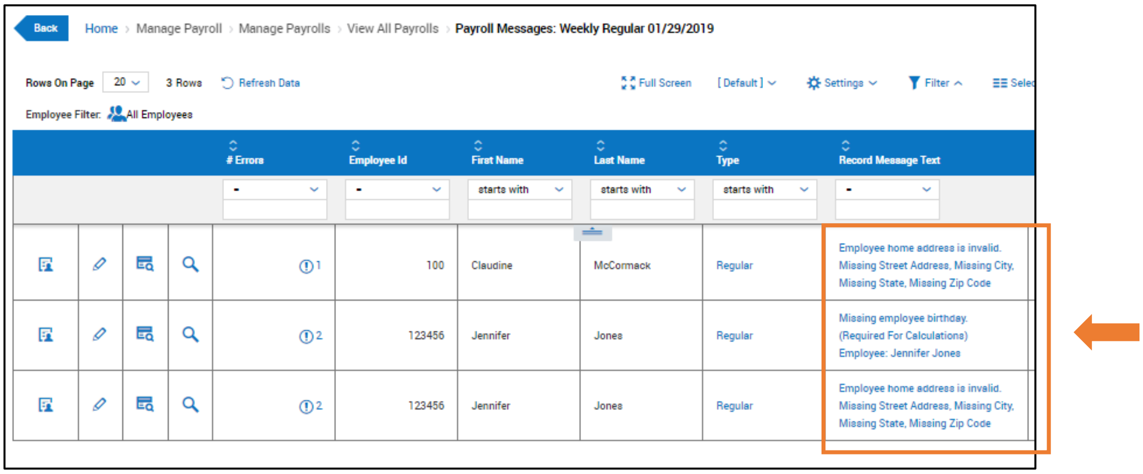


Initiate Payroll

7. Select Create Now.
8. After making any changes, be sure to select the text link, Recalculate Pay Statements.
9. Any open alerts will be listed in the Sign-Off Open Alerts. Address open alerts before proceeding.
10. In this example, we can see that we have pay statement errors.

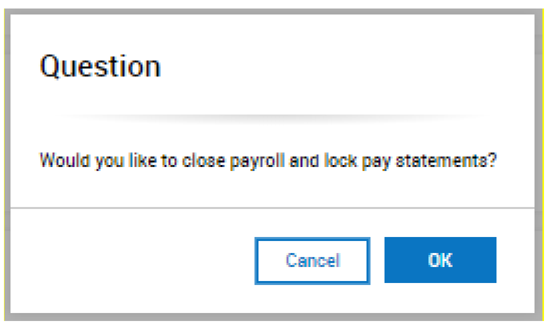


12. Select the first hyperlink and it will open the window with the details on the errors for each of the pay statements.



Payroll Errors

13. Select the error, which is a hyperlink, to (in this case) fill out the employee's address. *Continue through all errors until they are cleared.*
14. Return to the Payroll Prep screen and select the Recalculate option and the Sign-Off Open Alerts will now be clear of errors.
15. Select **Close Payroll**.



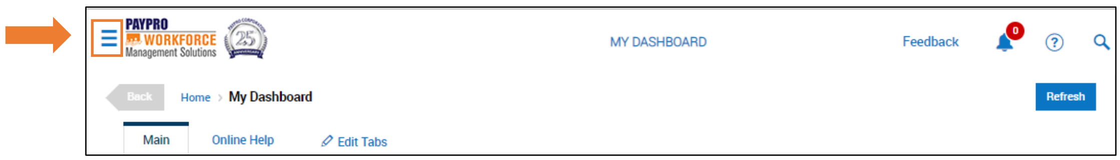
16. Select **OK**.
17. Select **Check Your Totals**.
18. Select **View Payroll**.
19. Select **Submit Payroll**.
    Payroll is submitted to Paypro.

Reports

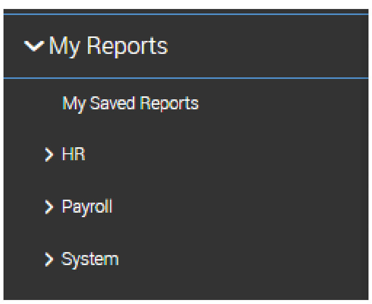
Selecting the Time Period of a Report

Most of the areas in WorkforceOne 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).

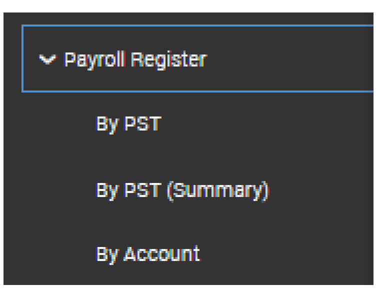
1. Select the Hamburger Menu (highlighted below).



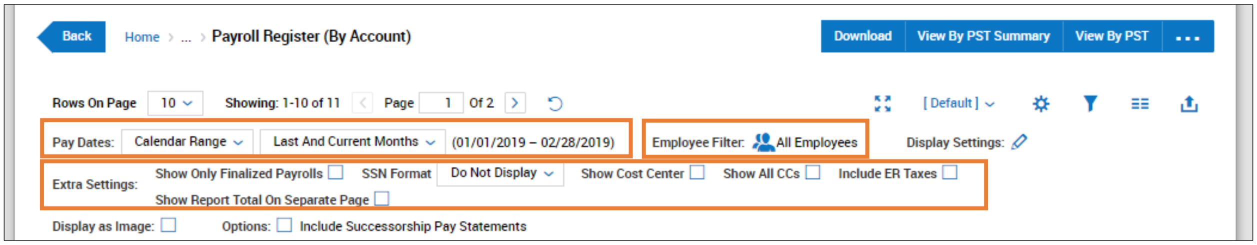
2. Select My Reports.



3. Select Payroll.
4. Select Payroll Register.



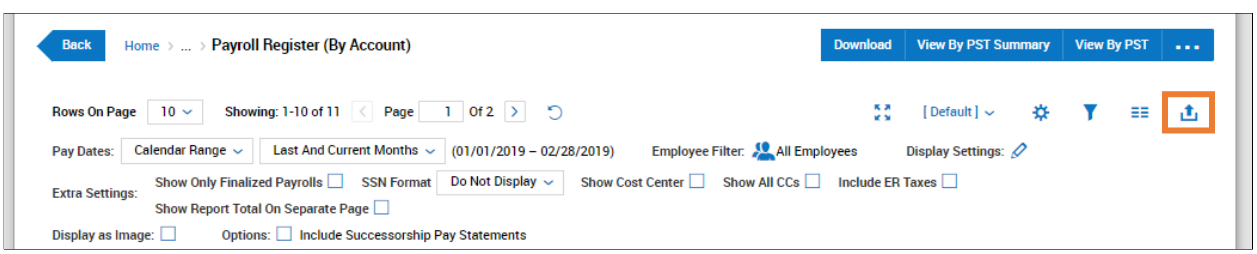
5. Select by Account.



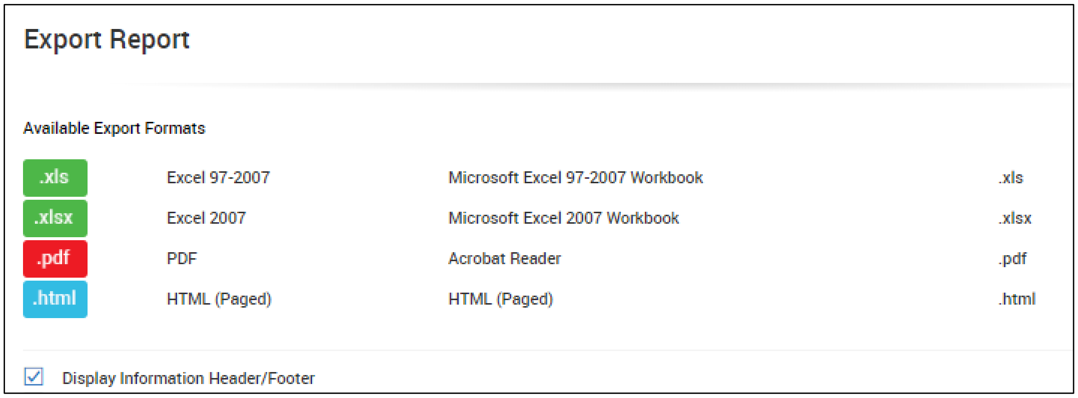
Report Options:

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	• Show Only Finalized Payrolls: eliminates payrolls that are not final. • SSN Format: this drop-down will let you display the social security number, part of the number, or not at all. • Show Cost Centers: will display the cost center that employee is in • Show All CCs: will display sub cost centers. • Include ER Taxes: include Employer Required taxes. • 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.

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.



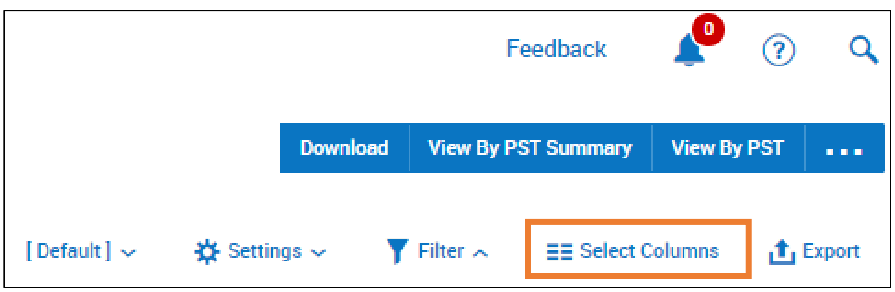
7. Select the export file format you want for your report.

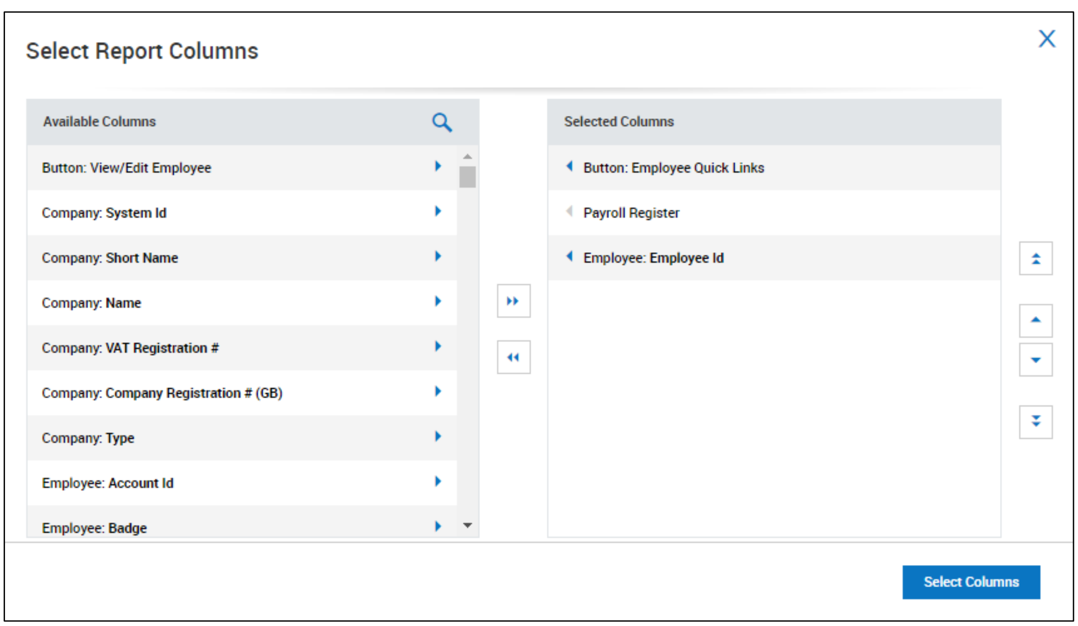


Adding/Changing Report Columns

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.



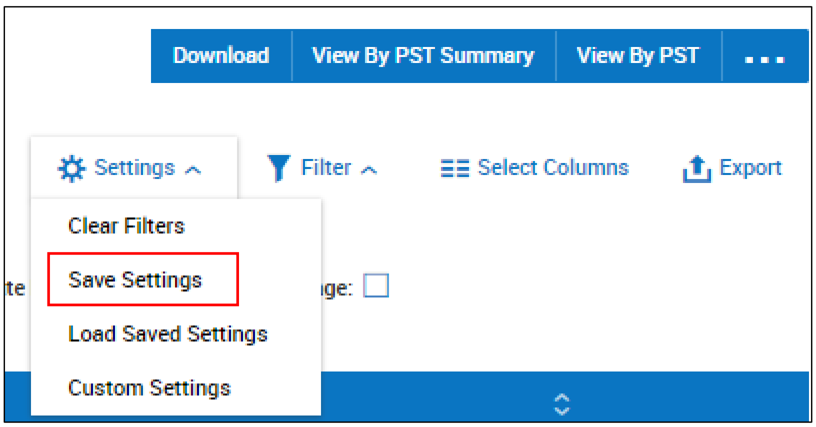


2. On the left are the available columns. You can scroll to find the column you want or use the magnifying glass to search for a column.
3. Select the right arrow next to any column title and move it to the Selected Columns section.
4. Select the arrows on the Selected Columns to remove them from the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

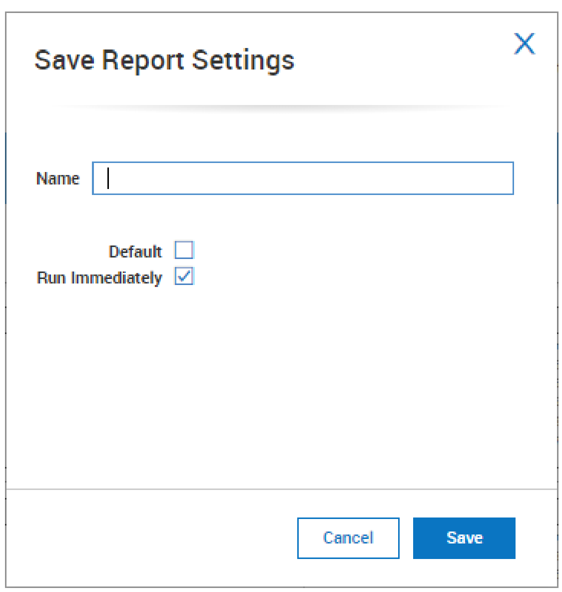
Save Report View

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.

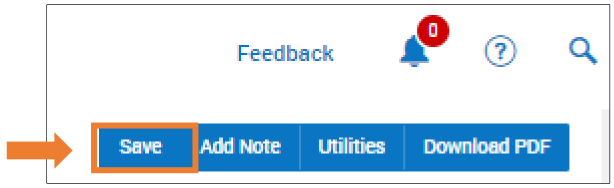
1. Select Settings Cog Wheel/Drop-down menu.
2. Select Save Settings (as displayed below).



3. Give the settings a name.

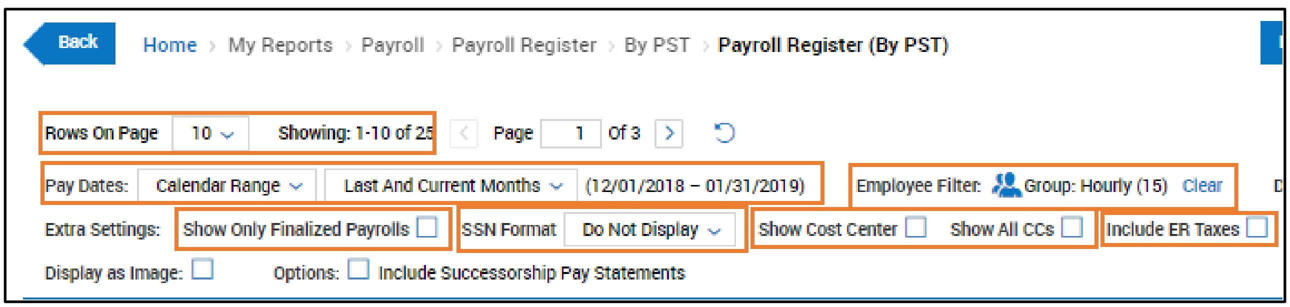


4. If you select the Default checkbox that will be the first display you see. It will NOT replace the current report saved as Default.
5. Select the **Save** button on the top right corner to save your work.



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.



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

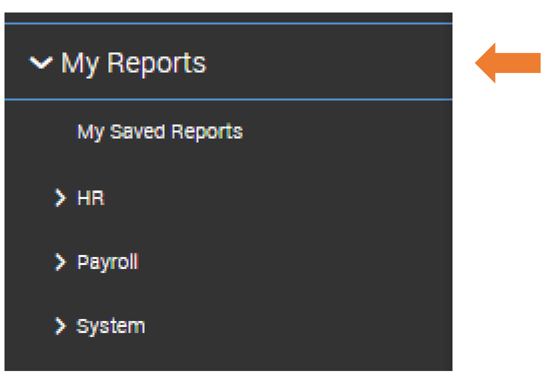
Pay Statement History

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.)

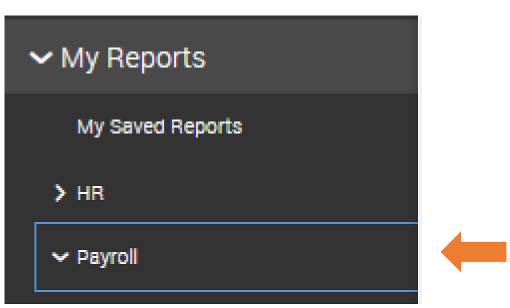
How to View Pay Statement History

1. Select the Hamburger Menu (highlighted below).

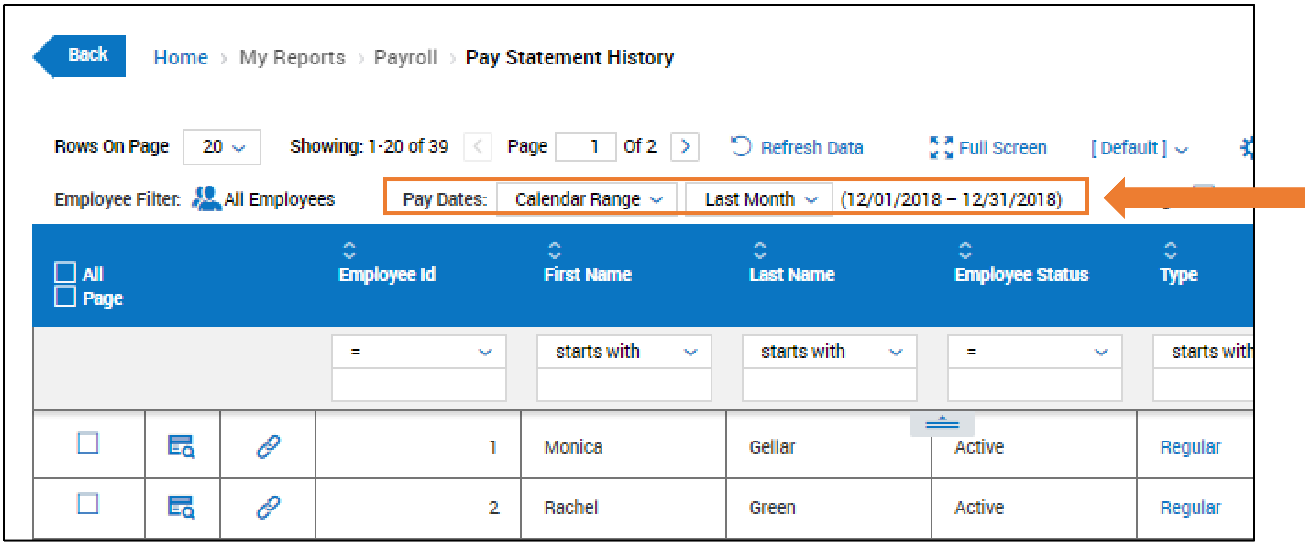
2. Select **My Reports**.



3. Select **Payroll**.



4. Select **Pay Statement History**.



Pay Statement History

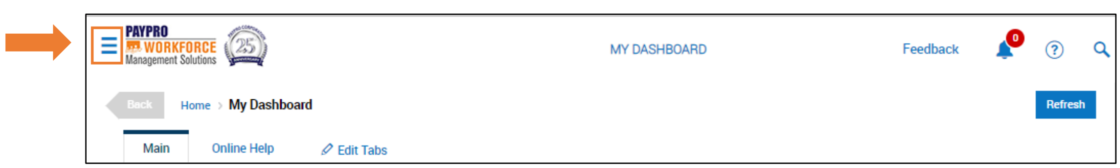
Once in the ***Pay Statement History*** window, choose a time-period you wish to view from the menu highlighted in the screenshot above.

Payroll Register

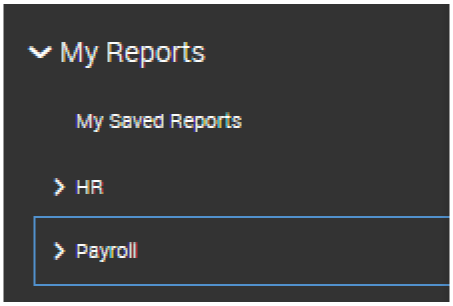
The Payroll Register will display a record for each pay statement, by employee, in the payroll and additional reports can be spawned from this register.

How to View the Payroll Register

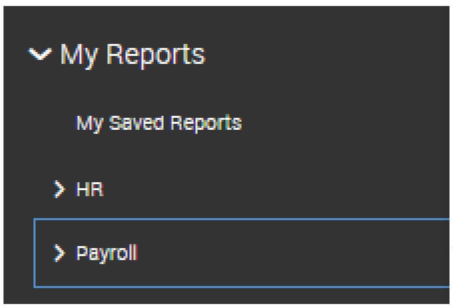
1. Select the Hamburger Menu (highlighted below).



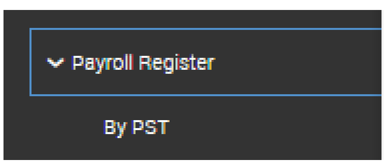
1. Select My Reports.

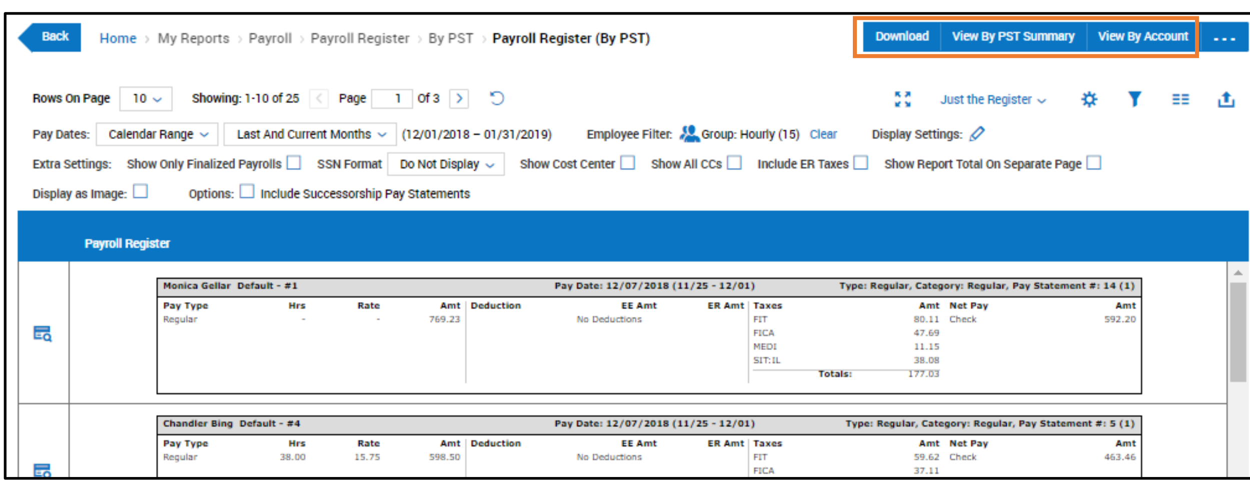


2. Select **Payroll**.



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





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 Summary	Displays a summary per employee. Within the PST Summary you can select 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 Download PDF buttons.
View by Account	This report provides the costs centers breakout in the same view as a payroll register broken down by employee.