

Running Defined Reports

The Reports menu lets the user see reports that have been published to Evolution Payroll from VMR, as well as process additional reports as needed. There are two report types identified that we refer to:

• Defined Reports

Defined Reports can be generated from Evolution Payroll on demand. Published reports are generated in Evolution and sent to Evolution Payroll using VMR.

Defined Reports

Defined reports are company-level reports that can be generated by the user on demand in Evolution Payroll. These reports must be set up for the company in Evolution Classic on the Reports – Setup Reports screen. Refer to the Reports Menu Fields module for a list of available reports that can be generated in Evolution Payroll.

Reports

DEFINED REPORTS	Search For Report EXPORT TO EXCEL		Payroll Register
	Report Name	▼ Report # ▲ ▼	Choose options for this report
	Payroll Register (S109)	109	
	Earnings And Deductions (S181)	181	CONFIGURE REPORT
	General Ledger (S183)	183	
	Tip Minimum Wage (S192)	192	
	Cover Letter (S193)	193	
	Direct Deposit (S211)	211	
	EE Cost (S213)	213	
	401K Report (S215)	215	
	Time-Off Report (S216)	216	
	Time-Off History (S223)	223	
	Job Costing (S229)	229	
	Taxable Wages For Payroll By Ck Date (S236)	236	
	Excess Tips FICA Credit Report (S244)	244	
	Tax Report For Payroll (S247)	247	
	New Hire Pending (S292)	292	
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- 1. Select the report from the list.
- 2. Click the **Configure Report** button.

Result: The parameters screen opens for the report being configured.



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DEFINED REPORTS PUBLISHED REPORTS	← REP	orts list Opti	ons for I	Payroll	Reg	ister		
	Payroll	Filter EE Filter	Org Filter	Misc Options	Run Rep	port		
	Select th	ne date range to use for yo	ur report. All payrol	lls within your ra	nge will be	selected. You can fine tune your selection by checking onl	y the payrolls you want to include	i.
	Starting I	Date	Ending Date		Incl	ude		
	01/0	1/2019	10/09/201	19		All Payrolls		
		Check Date *	Ŧ	Run #	Ţ	Processed Date	T Status T	Туре
		09/19/2019		1			Pending	Regular
	×	09/12/2019		1		09/09/2019 09:53:53 AM	Processed	Regular
		09/05/2019		1			Not Started	Regular
		04/01/2019		1		03/19/2019 10:38:10 AM	Processed	Regular
		03/28/2019		1		03/18/2019 03:52:16 PM	Processed	Regular
		03/21/2019		1		03/18/2019 03:40:31 PM	Processed	Regular
		03/18/2019		1		03/18/2019 03:37:26 PM	Processed	Tax Deposit
		03/11/2019		1		03/06/2019 03:24:23 PM	Processed	Misc Check Adjustment
		02/21/2019		1		02/25/2019 10:57:03 AM	Processed	Regular
		02/14/2019		1		02/12/2019 02:33:01 PM	Processed	Regular
	н	⊲ Page 1	of2 ⊩ ⊨					1 - 10 of 11 items

- 3. Click the tabs above the grid to access the report parameters. Each report can be filtered by Payroll, Employee (EE), and Organization Level (Org). Parameters on each tab are specific to the report that is being generated.
- 4. Click the **Reports List** button to return to the previous screen listing the Defined Reports.

Users can search for a specific report by using the **Search for Report** tool at the top of the table, or by using the filters as described in the Evolution Payroll Navigation module.

Reports				
DEFINED REPORTS PUBLISHED REPORTS	Search For Report EXPORT TO EXCEL			Payroll Register
AD HOC REPORTS	Report Name	т	Report # *	Choose options for this report
	Payroll Register (S109)		109	
	Earnings And Deductions (S181)		181	CONFIGURE REPORT
	General Ledger (S183)		183	



Generating a Report

- 1. Select the report from the list of the Reports.
- 2. Click the **Configure Report** button.
- 3. On the **Payroll Filter** tab select the Starting Date and Ending Date to filter the payrolls to a specific date range (optional), or use the Include field dropdown list to select from displaying All Payrolls or Processed Payrolls only.

Reports

DEFINED REPORTS	← REP	ORTS LIST OP	tio	ns for I	Payroll	Re	egi	ster				
PUBLISHED REPORTS	Payroll I	Filter EE Filter		Org Filter	Misc Options	Rui	n Rep	ort				
	Select th	e date range to use for	r your	report. All payrol	s within your ra	nge w	ll be :	selected. You can fine tune your selection by checking	only th	e payrolls you want to inclu	ıde.	
	Starting [Date		Ending Date			Inclu	ıde				
	01/0	1/2019	Î	10/09/201	9			All Payrolls * APPLY				
		Check Date *		Ŧ	Run #		Ŧ	Processed Date	Ŧ	Status	Ŧ	Туре
		09/19/2019			1					Pending		Regular
	۲	09/12/2019			1			09/09/2019 09:53:53 AM		Processed		Regular
		09/05/2019			1					Not Started		Regular
		04/01/2019			1			03/19/2019 10:38:10 AM		Processed		Regular
		03/28/2019			1			03/18/2019 03:52:16 PM		Processed		Regular
		03/21/2019			1			03/18/2019 03:40:31 PM		Processed		Regular
		03/18/2019			1			03/18/2019 03:37:26 PM		Processed		Tax Deposit
		03/11/2019			1			03/06/2019 03:24:23 PM		Processed		Misc Check Adju
		02/21/2019			1			02/25/2019 10:57:03 AM		Processed		Regular
	-											

- 4. Click Apply to return a list of payrolls based on the filters selected.
- 5. Select the payroll(s) for which to run the report.
- Note: Users must select at least one payroll to be able to select other filters and parameters or generate the report.



6. Click the **EE Filter** tab to select or deselect employees from the report.

Reports									
DEFINED REPORTS PUBLISHED REPORTS	DEFINED REPORTS LIST Options for Payroll Register								
AD HOC REPORTS	Payroll	Filter EE Filter	Org Filter Misc Options	Run Report					
	You can	apply a filter to reduce th	e number of employees in the list. Fin	e tune the list by checking.					
	Sear	ch for employee(s)							
		EE # 🔻	SSN / EIN	Last Name T	First Name 🔻	MI T	Status T		
		01	323-33-3333	Smith	Lisa		Terminated		
		1	123-45-6987	Janson	Jennifer	L	Termination Due To Death		
	8	2	789-45-6126	Glazer	JoAnne		Active		
		3	112-33-4455	Flax	Ron		Active		
	8	4	555-55-5555	Carlow	Jane		Active		
		5	456-12-3987	Timm	Robert		Active		
	8	6	946-15-3152	Miller	Renee	D	Active		
		7	984-34-9581	Mills	Linda		Active		
		8	546-21-3879	Carlow	Harriet	E	Active		
		9	788-45-1236	Zenlea	Stephen		Active		
	н	Page 1	of 3 🕨 🖬				1 - 10 of 25 items		

7. Click the **Org Filter** tab to filter by organization (D/B/D/T) level

Reports											
DEFINED REPORTS PUBLISHED REPORTS	+ F	← REPORTS LIST Options for Payroll Register									
AD HOC REPORTS	Payr	oll Filter EE Filter	Org Filter Mise	c Options Run Report							
	Select the organizational level that you want to use for this report. Fine tune by checking a specific level. If no selection is made, your results will include all organization levels for this company.										
	Te	eam		*							
	ø	Division	Division #	Branch	Branch #	Department	Department #	Team	Team #		
	2	BDazzled Design Retai Division	l 100	BDazzled Design Retail - Williston	1000	BDazzled Design Sales- Marketing	10022	BDazzled Design Retail New Eng	1025		
		BDazzled Design Retai Division	l 100	BDazzled Design Retail - Williston	1000	BDazzled Design Sales- Marketing	10022	BDazzled Design Mid- Atlantic	1026		
		BDazzled Design Retai Division	l 100	BDazzled Design Retail - Burlington	1001	BDazzled Design Retail Client Services	101	BDazzled Design Retail Shipping/Dist	1002		



8. Click the **Misc.Options** tab to update parameters specific to this report. This screen offers instructions for running the report, as well as the grouping and sorting methods to select from.

Reports					
DEFINED REPORTS PUBLISHED REPORTS	← REPORTS LIST Opt	ions for Payroll	Register		
AD HOC REPORTS	Payroll Filter EE Filter	Org Filter Misc Options	Run Report		
	Additional options available for th	is report:			
		Parameters	÷	Grouping & Sorting	
	Show only Summar	y for Multiple check dates		Group Level	
	Show Home DBDT	for each Employee		Division	•
	Include Memos in Television	otals		Group Type	
	Include Pieces from	Piecework in Totals		Summary Detail	•
	Break Employee Be	tween Pages		Group Sort	
	Include Taxable Mer	nos in Totals	_	Detail Sort	
	Deductions as Taxe	3		Employee SSN	*
	Show Shift Different	ials		011	
	Bold EE Name, Che	ck Number and Net Check		Do according to Company Setup	*
	Hide SSN, State Fre	quency and Salary	•		

9. Click the **Run Report** tab to verify report parameter settings.

Reports				
DEFINED REPORTS PUBLISHED REPORTS	← REPORTS LIST Options for Payroll Register			
AD HOC REPORTS	Payroll Filter EE Filter Org Filter Misc Options Run Report			
	Depending on your filters and options, this report may take a long time to generate. If you run this report a tas	k will be placed in the queue to generate it.		
	You will find an entry in the task queue for your generated report. You can then view the report from the queue	e entry.		
	Your current report definition is set as follows:	With options set:		
	Date Range: 09/12/2019-09/12/2019	Include Memos in Totals		
	Pavrolis: 1 Pavroli(s) Selected.	Include Pieces from Piecework in Totals		
		Break Employee Between Pages		
	Employees: 25 Employee(s) Selected.	Include Taxable Memos in Totals		
	Organization:	Deductions as Taxes		
	BDazzled Design Retail Division>BDazzled Design Retail - Williston>BDazzled Design Sales- Marketing>BDazzled Design Retail New Eng BDazzled Design Retail Division>BDazzled Design Retail - Williston>BDazzled Design Sales-	etc		
	Marketing>BDazzled Design Mid-Atlantic BDazzled Design Retail Division>BDazzled Design Retail - Burlington>BDazzled Design Retail Client	Group Level: Division		
	Services>BDazzled Design Retail Shipping/Dist	Group Sort: Group Code		
		Group Type: Summary Detail		
		SUI: Do according to Company Setup		
	RUN THIS REPORT			
	1 Task Queue symbol at the bottom of the menu	bar once the report is		

- 10. Click Run This Report.
- 11. Click the Task Queue to view and print the report.