

## 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

PUBLISHED REPORTS

EXPORT TO EXCEL

Report Name	Report #
Payroll Register (S109)	109
Earnings And Deductions (S181)	181
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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## Payroll Register

Choose options for this report

CONFIGURE REPORT →

1. Select the report from the list.
2. Click the **Configure Report** button.

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

## Reports

DEFINED REPORTS

PUBLISHED REPORTS

← REPORTS LIST

Options for Payroll Register

Payroll Filter
EE Filter
Org Filter
Misc Options
Run Report

Select the date range to use for your report. All payrolls within your range will be selected. You can fine tune your selection by checking only the payrolls you want to include.

Starting Date

Ending Date

Include

▼

<input type="checkbox"/>	Check Date ▼	Run #	Processed Date	Status	Type
<input type="checkbox"/>	09/19/2019	1		Pending	Regular
<input checked="" type="checkbox"/>	09/12/2019	1	09/09/2019 09:53:53 AM	Processed	Regular
<input type="checkbox"/>	09/05/2019	1		Not Started	Regular
<input type="checkbox"/>	04/01/2019	1	03/19/2019 10:38:10 AM	Processed	Regular
<input type="checkbox"/>	03/28/2019	1	03/18/2019 03:52:16 PM	Processed	Regular
<input type="checkbox"/>	03/21/2019	1	03/18/2019 03:40:31 PM	Processed	Regular
<input type="checkbox"/>	03/18/2019	1	03/18/2019 03:37:26 PM	Processed	Tax Deposit
<input type="checkbox"/>	03/11/2019	1	03/06/2019 03:24:23 PM	Processed	Misc Check Adjustment
<input type="checkbox"/>	02/21/2019	1	02/25/2019 10:57:03 AM	Processed	Regular
<input type="checkbox"/>	02/14/2019	1	02/12/2019 02:33:01 PM	Processed	Regular

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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

AD HOC REPORTS

Search For Report...

EXPORT TO EXCEL

Report Name	Report # ▲ ▼
Payroll Register (S109)	109
Earnings And Deductions (S181)	181
General Ledger (S183)	183

### Payroll Register

Choose options for this report

CONFIGURE REPORT →

## 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

PUBLISHED REPORTS

AD HOC REPORTS

←
REPORTS LIST

Options for Payroll Register

Payroll Filter
EE Filter
Org Filter
Misc Options
Run Report

Select the date range to use for your report. All payrolls within your range will be selected. You can fine tune your selection by checking only the payrolls you want to include.

Starting Date

Ending Date

Include

All Payrolls ▼

<input type="checkbox"/>	Check Date ▼	Run #	Processed Date	Status	Type
<input type="checkbox"/>	09/19/2019	1		Pending	Regular
<input checked="" type="checkbox"/>	09/12/2019	1	09/09/2019 09:53:53 AM	Processed	Regular
<input type="checkbox"/>	09/05/2019	1		Not Started	Regular
<input type="checkbox"/>	04/01/2019	1	03/19/2019 10:38:10 AM	Processed	Regular
<input type="checkbox"/>	03/28/2019	1	03/18/2019 03:52:16 PM	Processed	Regular
<input type="checkbox"/>	03/21/2019	1	03/18/2019 03:40:31 PM	Processed	Regular
<input type="checkbox"/>	03/18/2019	1	03/18/2019 03:37:26 PM	Processed	Tax Deposit
<input type="checkbox"/>	03/11/2019	1	03/06/2019 03:24:23 PM	Processed	Misc Check Adju
<input type="checkbox"/>	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

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DEFINED REPORTS

PUBLISHED REPORTS

AD HOC REPORTS

← REPORTS LIST

## Options for Payroll Register

Payroll Filter
EE Filter
Org Filter
Misc Options
Run Report

You can apply a filter to reduce the number of employees in the list. Fine tune the list by checking.

<input type="checkbox"/>	EE #	SSN / EIN	Last Name	First Name	MI	Status
<input type="checkbox"/>	01	323-33-3333	Smith	Lisa		Terminated
<input type="checkbox"/>	1	123-45-6987	Janson	Jennifer	L	Termination Due To Death
<input type="checkbox"/>	2	789-45-6126	Glazer	JoAnne		Active
<input type="checkbox"/>	3	112-33-4455	Flax	Ron		Active
<input type="checkbox"/>	4	555-55-5555	Carlow	Jane		Active
<input type="checkbox"/>	5	456-12-3987	Timm	Robert		Active
<input type="checkbox"/>	6	946-15-3152	Miller	Renee	D	Active
<input type="checkbox"/>	7	984-34-9581	Mills	Linda		Active
<input type="checkbox"/>	8	546-21-3879	Carlow	Harriet	E	Active
<input type="checkbox"/>	9	788-45-1236	Zenlea	Stephen		Active

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

Reports

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DEFINED REPORTS

PUBLISHED REPORTS

AD HOC REPORTS

← REPORTS LIST

## Options for Payroll Register

Payroll Filter
EE Filter
Org Filter
Misc 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.

Team

▼

<input checked="" type="checkbox"/>	Division	Division #	Branch	Branch #	Department	Department #	Team	Team #
<input checked="" type="checkbox"/>	BDazzled Design Retail Division	100	BDazzled Design Retail - Williston	1000	BDazzled Design Sales-Marketing	10022	BDazzled Design Retail New Eng	1025
<input checked="" type="checkbox"/>	BDazzled Design Retail Division	100	BDazzled Design Retail - Williston	1000	BDazzled Design Sales-Marketing	10022	BDazzled Design Mid-Atlantic	1026
<input checked="" type="checkbox"/>	BDazzled Design Retail Division	100	BDazzled Design Retail - Burlington	1001	BDazzled Design Retail Client Services	101	BDazzled Design Retail Shipping/Dist	1002

- 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

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

 **Task Queue** symbol at the bottom of the menu bar once the report is

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