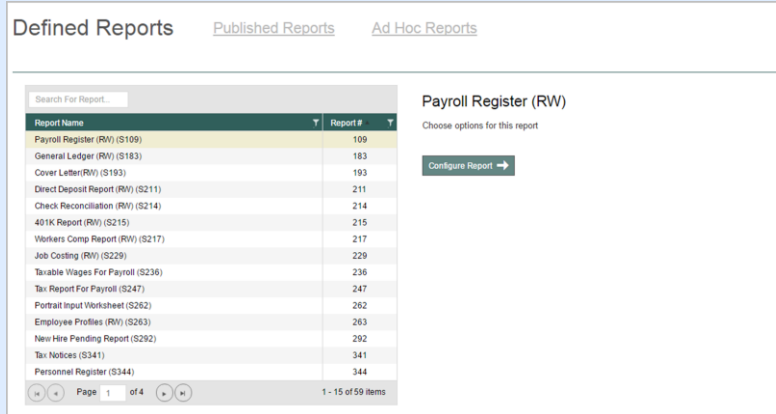


Defined Reports Screen

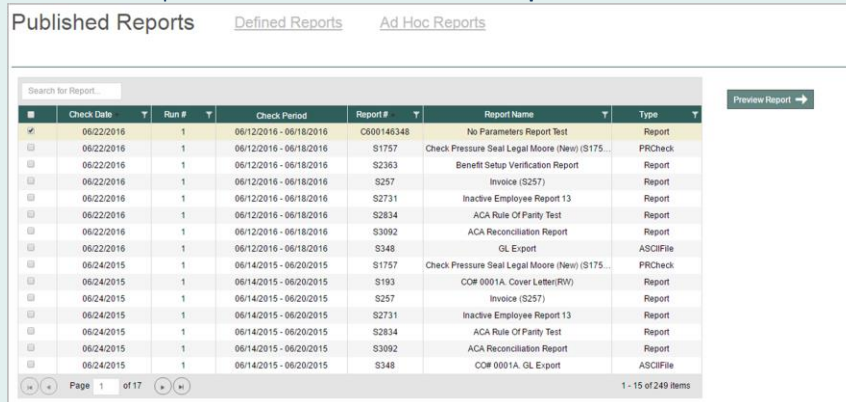
Defined reports are the Company level reports that can be generated by the user on demand in Evolution Payroll. These reports must be set up for the company in Evolution Classic on the Reports – Setup Reports screen. This is the default Reports screen that opens when you click the **Reports** menu bar item. Select a report and click the **Configure Report** button to set the parameters for the Defined Report.



Report Name	Report #
Payroll Register (RW) (S109)	109
General Ledger (RW) (S183)	183
Cover Letter(RW) (S193)	193
Direct Deposit Report (RW) (S211)	211
Check Reconciliation (RW) (S214)	214
401K Report (RW) (S215)	215
Workers Comp Report (RW) (S217)	217
Job Costing (RW) (S229)	229
Taxable Wages For Payroll (S236)	236
Tax Report For Payroll (S247)	247
Portrait Input Worksheet (S262)	262
Employee Profiles (RW) (S263)	263
New Hire Pending Report (S292)	292
Tax Notices (S341)	341
Personnel Register (S344)	344

Published Reports Screen

The Published Reports screen offers access to reports, tax returns, and ASCII files generated in Evolution Classic and sent through the Virtual Mail Room (VMR) to Evolution Payroll. To display the Published Reports screen, click the **Published Reports** button on the header of the Defined Reports screen or, click on the **Published Reports** tile title on the Dashboard. Select a report on the Published Reports screen and click the **Preview Report** button.



Check Date	Run #	Check Period	Report #	Report Name	Type
06/22/2016	1	06/12/2016 - 06/18/2016	C000148348	No Parameters Report Test	Report
06/22/2016	1	06/12/2016 - 06/18/2016	S1757	Check Pressure Seal Legal Moore (New) (S175...	PRCheck
06/22/2016	1	06/12/2016 - 06/18/2016	S2363	Benefit Setup Verification Report	Report
06/22/2016	1	06/12/2016 - 06/18/2016	S257	Invoice (S257)	Report
06/22/2016	1	06/12/2016 - 06/18/2016	S2731	Inactive Employee Report 13	Report
06/22/2016	1	06/12/2016 - 06/18/2016	S2834	ACA Rule Of Parity Test	Report
06/22/2016	1	06/12/2016 - 06/18/2016	S3092	ACA Reconciliation Report	Report
06/22/2016	1	06/12/2016 - 06/18/2016	S348	GL Export	ASCIIFile
06/24/2015	1	06/14/2015 - 06/20/2015	S1757	Check Pressure Seal Legal Moore (New) (S175...	PRCheck
06/24/2015	1	06/14/2015 - 06/20/2015	S193	CO# 0001A, Cover Letter(RW)	Report
06/24/2015	1	06/14/2015 - 06/20/2015	S257	Invoice (S257)	Report
06/24/2015	1	06/14/2015 - 06/20/2015	S2731	Inactive Employee Report 13	Report
06/24/2015	1	06/14/2015 - 06/20/2015	S2834	ACA Rule Of Parity Test	Report
06/24/2015	1	06/14/2015 - 06/20/2015	S3092	ACA Reconciliation Report	Report
06/24/2015	1	06/14/2015 - 06/20/2015	S348	CO# 0001A, GL Export	ASCIIFile

Overview

The Reports menu lets you see reports that have been published to Evolution Payroll from VMR, as well as process additional reports as needed. It allows you to retrieve key payroll information such as quarterly and annual returns in addition to your detailed payroll reports.

There are three report types that we refer to:

- **Defined Reports** – Reports that can be generated from Evolution Payroll on Demand.
- **Published Reports** - Reports that are generated in Evolution Classic and sent to Evolution Payroll using VMR. Any report that was or is currently visible under Processed Reports in the WebClient product is available under the Published Reports area of Evolution Payroll.
- **Ad Hoc Reports** – Ad Hoc reports are executed at the user’s discretion and can be customized. See the separate job aid – *Using Ad Hoc Reports in Evolution Payroll*.

To Display the Reports Menu

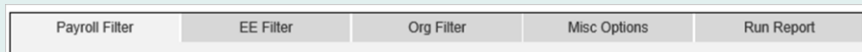
On the menu bar on the left side of the screen, click the **Reports** menu item.



Result: The Defined Reports screen opens.

Using the Defined Reports Screen

Select the report from the Defined Reports list screen and click the **Configure Report** button. The system displays the Options for [report name] screen.

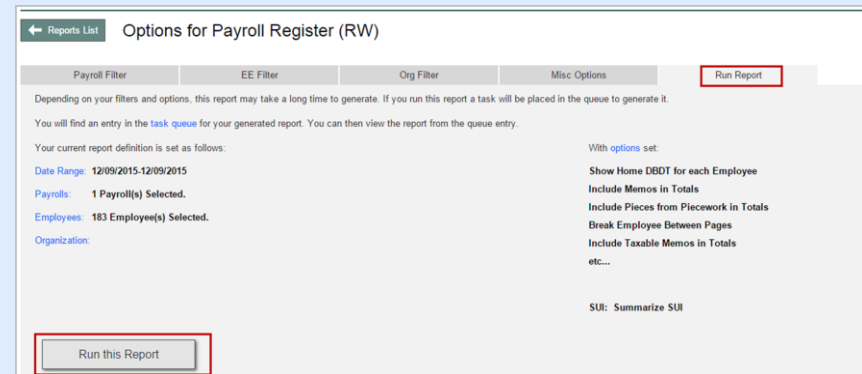


Filters and options for the reports are listed on the tabs on the top of the Defined Reports screen. Each tab contains parameters that can be set when generating the report.

Each report can be filtered by **Payroll**, **Employee (EE)**, and **Organization Level (Org)**. The **Misc. Options** tab contains parameters that are specific to the report that is being generated. The number of displayed tabs may vary by the selected report. The **Run Report** tab is described to the right.

Run Report tab

The Run Report tab displays the selected parameters for the report prior to generating; you must click the **Run this Report** button to initiate the report.



To Generate a Defined Report

1. Select the report from the list of the Reports & click **Configure Report**.
2. Select the payroll(s) from the **Payroll Filter** tab.
3. Update the **Starting Date** and **Ending Date**.
4. Click **Apply** to return a list of payrolls within a specific time period. Users can include all payrolls or processed payrolls only.

Note: Users must select at least one payroll (on the Payroll Filter) to be able to select other filters and parameters or to generate the report.

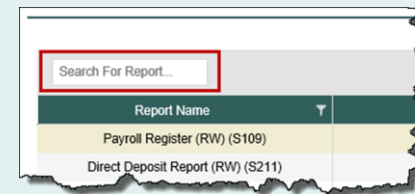
5. Click the **EE Filter** tab and the **Org Filter** tab if needed.
6. Click the **Misc. Options** tab to update parameters specific to this report.
7. Click the **Run Report** tab and then click **Run This Report**.

Result: The **Run Report** tab displays the selected parameters for the report prior to generating.

8. Open the **Task Queue** to view or print the report from the **Task Queue** once the report is generated.

To Search for a Report

You can search for a specific report by using the Search for Report field at the top left of the table in both the Defined Reports and Published Reports screens.



You can search by Report Name or Report Number.

Using the Published Reports Screen

The Published Reports screen offers access to reports, tax returns, and ASCII files generated in Evolution Classic and sent through the Virtual Mail Room (VMR) to Evolution Payroll. SBs use published reports to give clients electronic access to the additional paper reports they get with their payroll. It basically gives them a repository, by date, and searchable by report name, to review a prior payroll's totals. Published reports will ALWAYS only apply to specific payrolls, by design. Defined reports, on the other hand, will allow an Evolution Payroll user to set parameters and choose which payroll(s) to include in the results. Output goes to the Task Queue.

Published Report Screen Columns

The table below describes the columns on the Published Reports screen.

Column Name	Description
Check Date	The date of the payroll from which the report was generated. For Tax Returns, this is the last date entered on the Tax Return screen when tax returns are processed.
Run #	The payroll run from which the report was created. Tax Returns will show a run number of 0.
Check Period	The batch period of the payroll for which this report was generated. Tax Returns will not display a batch period.
Report #	The Evolution report number for this report.
Report Name	The name of the report or tax return.
Type	The type of document displayed.

Security Rights – Defined Reports

In order for a user to be able to use Defined Reports, they will need the following security right enabled:

- Reports > Run Reports (Menu)

To View, Save, or Print a Published Report

1. Check the box in the left column of the table to select the report(s) to be viewed, saved, or printed. Click on the **Preview Report** button.
2. Use the Resizing tools in the Preview window, to zoom in or out to preview the report.
If more than one report is selected, use the arrows at the bottom of the Preview window to navigate between reports.
3. Click the Save icon at the top of the Preview window to save the report(s) to your hard drive and/or to open the report you are currently working on.
Result: The report(s) will be saved to your device.
4. Open the saved report on your device and print the report from there.

Note: Users can normally see links to their Published Reports on the Published Reports tile of the Dashboard. However, they will not see these on the Dashboard if they do not have security rights to this or if they do not have any Published Reports available to view.

Security Rights – Published Reports

In order for a user to be able to use Published Reports, they will need the following security rights enabled:

- Ability to access processed reports in webclient
- Ability to access VMR
- Ability to reprint payroll reports