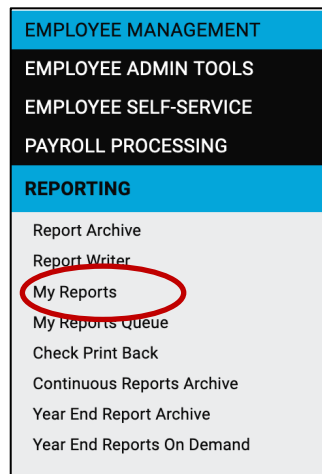


# Viewing and printing custom reports

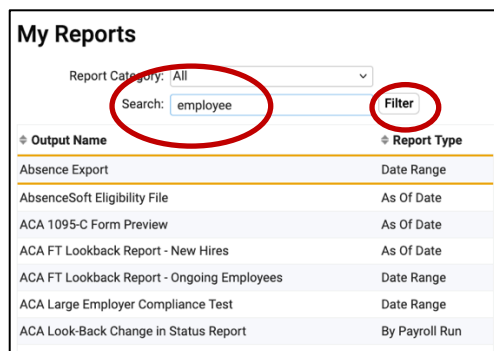
Use these instructions if you want to run reports other than the standard reports that are generated with each payroll. You would typically do this when you need a specialized report or a report for dates spanning multiple pay periods, such as an Employee Pay History report. (Instructions for running standard reports are in the document “Viewing and printing standard reports from current and recent payrolls”).

isolated has hundreds of reports you can run. Running a report does not change the underlying data, so if you are not sure whether a report provides the specific information you are looking for, you can run it without doing harm. Your Payroll Specialist can also suggest likely reports to help narrow down your options. There is no cost for reports you run yourself; there is a fee for PayPlus to run custom reports.

1. On the **Reporting menu**, select **My Reports**.



You will see all the reports available for you to run, in alphabetical order. Use the Search bar to filter the reports. Useful keywords are “payroll,” “taxes,” “labor,” “employee”. Click **Filter** to display the reports matching the keyword you used.



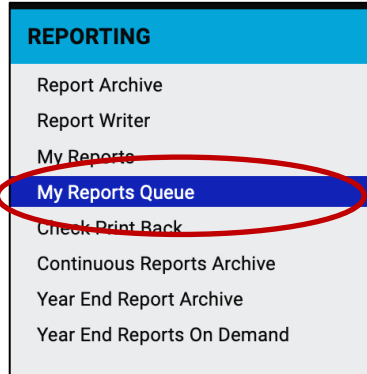
Some reports let you specify a date range, while others let you choose a single, specific payroll run. **As of Date** reports provide information up to a specific date.

2. Select the report, enter any required dates or select the desired payroll run. Some reports require you to choose a pay group from a dropdown menu. (For most clients, that is Basic Pay Group.) Some reports give you options for sorting the data or for generating a file format (PDF, Excel, CSV).

Click **Generate Report**.

The screenshot shows a web interface for generating a report. At the top, there are two buttons: "Generate Report" and "Go To My Reports Queue", both of which are circled in red. Below the buttons is a message: "Once your report request has been submitted you can do any of the following: Run another report, perform other tasks. The report will be available in My Reports Queue for 72 hours." The main content area is titled "Employee Earnings Summary" and includes a description: "This report displays employee total gross, taxes, deductions, net pay, check amount, and direct deposit amounts for the date range." Below this are several sections for configuration: "Filtering" with fields for "From Date" (2/1/2024), "To Date" (7/30/2024), "Legal Company" (dropdown), "Pay Groups" (Basic Pay Group), and "Employee" (text field); "Sorting" with three "Sort Field" dropdowns; "Grouping" with two "Organization Level" dropdowns; and "Options" with a "Format" dropdown set to "PDF".

When the report is generated, it will show up in **My Reports Queue** and be available there for 72 hours.



Click **View Report** to see the report. The report will open in a new window, from which you can download or print the report.

Client ID: 1178148 -		EMPLOYEE EARNINGS SUMMARY										Report Date Range: By Pay Date		
Pay Group: Basic Pay Group		Sorted By: Employee Name										2/1/2024 - 7/30/2024		
Emp #	Name	Gross Wage	Paid Earnings	1099/Exp Reimburse	Tips	Social Security	Medicare	Fed Wht	State Wht	Other State and Local	Debit	Net Amount	Check Amount	Direct Deposit
00000009		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00000011		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00000010		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00000001		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
13		7,176.00	7,176.00	0.00	0.00	444.91	104.05	365.17	331.37	33.01	0.00	5,897.49	353.66	5,543.83
00000002		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00000008		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00000003		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00000012		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00000004		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00000005		54,000.00	54,000.00	0.00	0.00	3,348.00	783.00	6,917.07	3,856.22	248.40	6,124.07	32,723.24	10,905.73	21,817.51
00000006		54,000.00	54,000.00	0.00	0.00	3,348.00	783.00	6,917.07	3,856.22	248.40	6,124.07	32,723.24	10,905.73	21,817.51
00000007		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Report Totals:</b>		<b>115,176.00</b>	<b>115,176.00</b>	<b>0.00</b>	<b>0.00</b>	<b>7,140.91</b>	<b>1,870.05</b>	<b>14,199.31</b>	<b>8,043.81</b>	<b>529.81</b>	<b>12,248.14</b>	<b>71,343.97</b>	<b>22,165.12</b>	<b>49,178.85</b>

## Videos

Custom reports by payroll run or date range

<https://learning.mysolved.com/library/quick-help-videos/running-client-reports>