# Online Quick User Guide

## *Contents*

*** Note: while on any screen, the Spectrum logo in the top left corner can be used to bring you back to your home page***

# Employee Maintenance

## *Hire New Employee(s):*

- Click on **My Team >Employee Information> Hire**


- There are 6 sections that are required to hire an employee:
  - Personal Information
  - Base Information
  - Base Compensation
  - Tax Information
  - Other Settings
  - Defaults
- Be sure to click "Continue" to go on to the next section
- If you feel a specific field is unnecessary and it is currently marked as required, please contact your Account Manager so they can make adjustments as necessary.


**Personal Information:**

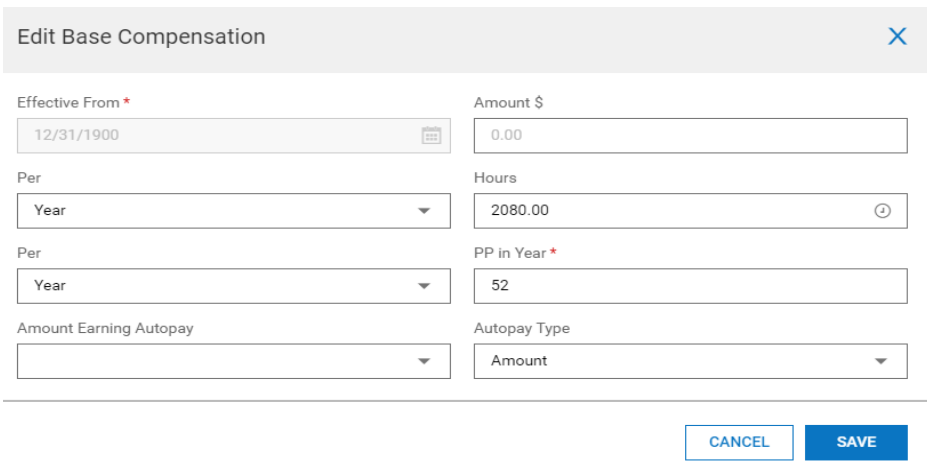
- The system will auto-generate the employee's ID, username, and password
  - The system-generated initial password is the last four of the employee's social security number that is in their profile
- Enter in the employee's first and last name

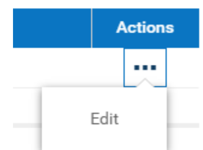
**Basic Information:**

- Address: Once you fill in the zip code, the system will automatically populate the City/State. You can also click the “Recommend” button to check the address accuracy through the UPS database
- Primary National ID is Required: Enter in the employee’s social security number
- Email: Enter in the employee’s email

**Base Compensation – Hourly:**

- Click the 3 dot icon & click “edit” to edit the employee’s base compensation
- A pop-up called “Edit Base Compensation” will show up and this is where you will enter the employee’s base compensation

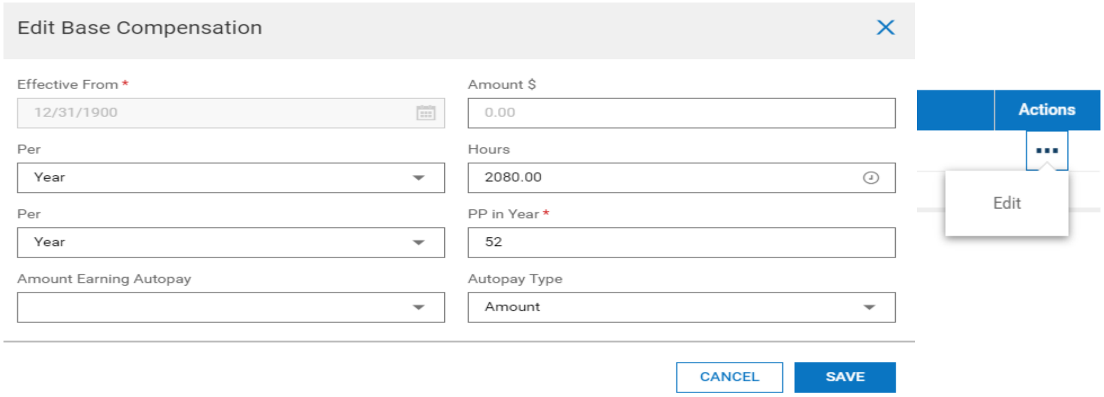



- **Amount:** Enter in the hourly rate for the employee
- **Per:** Select Hour
- **Hours:** The system automatically calculates 40 hours per week, which comes out to 2080 hours per year. This is for informational purposes only.
- **Per:** Default is per Year, you may change it as you desire (PP means per Pay Period).
- **PP In Year:** System will automatically fill in the amount of pay periods per year according to your company’s pay schedule.
- **Amount Earning Autopay:** For hourly employees, this can be left blank.
- **Autopay Type:** If you want this employee’s hours to be auto-populated into the payroll, choose “hours” here.
  - For example, if you are scheduled for a weekly payroll, the batch will auto-populate 40 hours based on the number of hours entered in the “hours” field above; However, if you want a different figure to reflect each payroll, change the amount of hours in that field.

**Base Compensation – Salary:**

- Click the 3 dot icon & click "edit" to edit the employee's base compensation

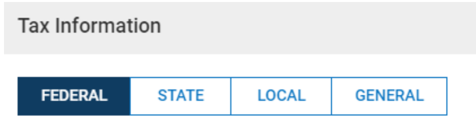


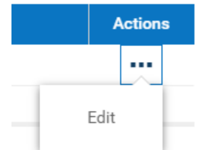

- **Amount:** Enter in the annual amount the employee should be paid. If the employee should be paid a specific amount per pay period, enter the per pay period amount here and adjust the "Per" section below to reflect this.
- **Per:** Select "year" if the amount that was inputted was an annual amount. If the employee is being paid a specific amount per pay period, change this to "PP" (pay period).
- **Hours:** The system automatically calculates 40 hours per week, which comes out to 2080 hours per year.
- **Per:** Select Year for all salary employees
- **PP In Year:** System will automatically fill in the amount of pay periods per year according to your company's pay schedule.
- **Amount Earning Autopay: to ensure this employee's per pay period amount pulls into payroll automatically, select "Salary"**
- **Autopay Type:** If you want this employee's pay to show both the Salary Hours and Salary Amount on their pay statement, select "Both" – this is typically required for 401k participants.
- **Note:** after entering in your amount and the other necessary information, please remember to check the "Total Compensation" reflected in this section to ensure it correctly shows the correct amount per year.

- When editing an employee's base compensation rate, click "+Add" on the right and enter the new amount along with the "Effective From" date for this new rate. If you modify the existing record, instead of adding a new record, the system will not be able to track the base compensation history.

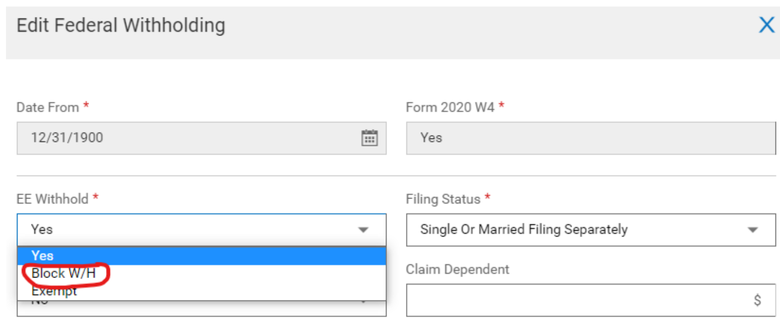
**Tax Information:**

- Click the 3 dot icon & click “edit” to edit the employee’s tax settings

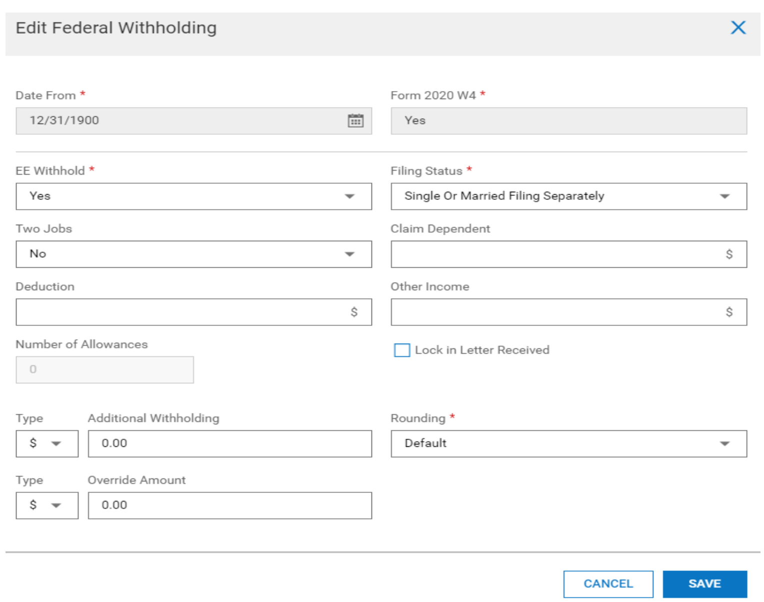



- **Federal**: enter the employee’s filing status and withholding as stated on their W-4. Make sure the employee has filled out a 2020 W-4.
    - **Form 2020 W-4:** “Yes” will need to be selected here to reflect that they’ve filled out a 2020 form
    - **EE Withhold:** If the employee has claimed “Exempt”, you are able to update the “EE Withhold” section to “Block W/H” – do <u>not</u> select “Exempt” here, *always* choose “Block W/H” to block any Federal income taxes from coming out of their checks




    - **Filing Status:** select the Filing Status that is reflected in Step 1, Section C
    - **Two Jobs:** if they have checked off the box under Step 2 on their W-4, select “Yes” in the Two Jobs section
    - **Claim Dependent:** enter the amount specified in Step 3
    - **Additional Withholding:** enter the amount specified in Step 4, Section C



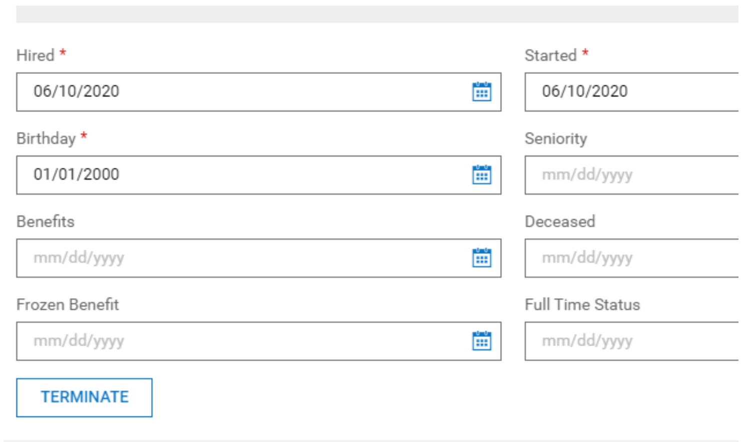
- **State**: enter the Employee's filing status & total dependents as stated on their L-4
- If an employee specifies "Exempt" or chooses to not have Federal or State taxes come out of their checks, click on the magnifying glass at the Federal or State level and choose "Block"
    - **Note:** the magnifying glass would only appear after the new employee has been created. Do <u>not</u> select "Exempt" – *always* choose "Block"!

**Other Settings:**

- Enter in the required information

## ***Terminate Employee(s):***

- Click on **My Team > Employee Information > Employee Information Icon next to the desired employee > Main Tab**
- Go to the "Date" section of the employee's profile and click "Terminate"

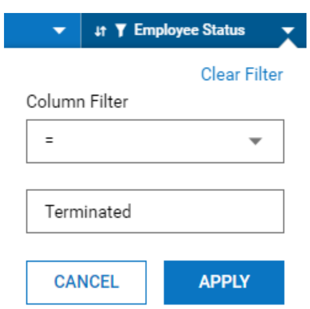



- Enter in the Termination Date for the employee and click "Continue Termination" in the top right. The employee is now terminated from the system.



## ***Rehire Employee(s):***

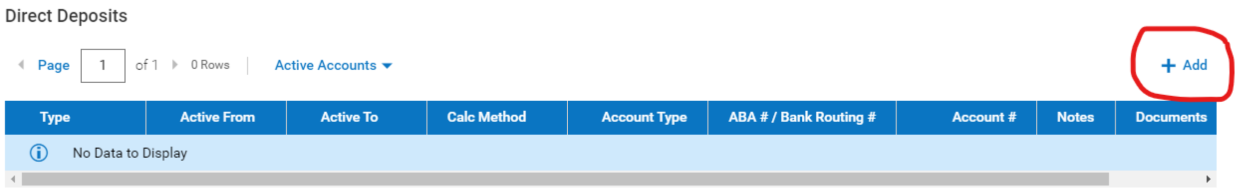
- Click on **My Team > Employee Information** then search for the employee by name and change the Employee Status to = Terminated. Once the employee's name appears, click on the "Employee Information" icon to enter into their profile.



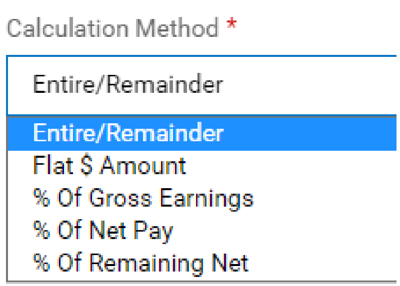

- Go to the "Date" section and click "Rehire"
- Enter in the Rehire Date of the employee and click "Rehire Employee". The employee is now rehired into the system.
    - **Note:** when you rehire an employee in the system, **be sure to have their updated personal, tax, and direct deposit information if there were any changes**.

## ***Direct Deposit Setup***

- Click on **My Team > Employee Information > Employee Information Icon next to the desired employee > Payroll Tab**
- Go to the Direct Deposit section
- Click on "+ Add" on the far right




- Fill in the required information:
  - **Account #**: Enter in the employee's bank account number (this will need to be entered twice to confirm the inputted account number)
  - **ABA Banking Routing #:** enter in the employee's bank routing number
  - **Pre-Note Status**: You will click the drop down menu in this box and select "Skip Pre-Note" if the employee provided you with a voided check or a direct deposit form from the bank with the Routing and Account Number; this is verifying that the numbers provided are correct
    - If an employee did not provide a voided check or direct deposit form, you will select "Ready to Send". A pre-note will be sent off to verify the numbers are correct.
  - **Calculation Method:** "Entire/Remainder" would be the default in this section, which is what needs to be selected for the entire compensation to go to one bank account



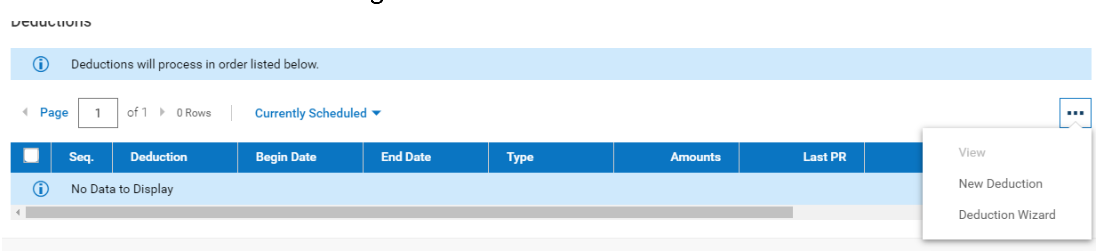

    - If an employee requests to have their pay split between two or more different bank accounts, you are able to do so. You will follow the same as above, changing the Calculation Method based on the employee's request.
      - Under Calculation Method drop down menu, you can choose:
        - <u>Flat $ Amount</u>: an employee requests a certain dollar amount to go into one account (example: $100 Flat $ Amount)
        - <u>% of Net Pay</u>: an employee requests a certain percentage to go into one account (example: 25% of Net Pay)
- There is an option to "**Reserve Live Check**" - this is used when an employee wants to receive a certain amount of his pay by check and the remainder by direct deposit.
  - Example: if an employee receives $700 per payroll and wants $400 paid by paper check with the remainder paid by direct deposit, you would select "Reserve Live Check" for

$400 and set up a direct deposit for the remaining amount (Selecting the “Entire/Remainder” Calculation Method for this direct deposit)

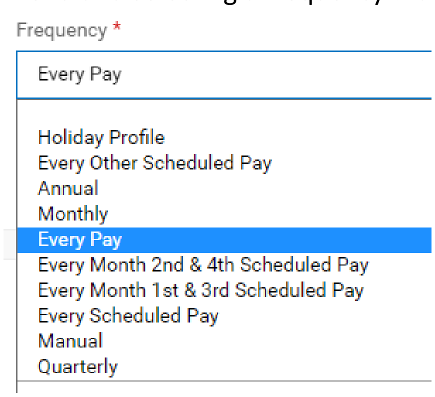
- **Note:** a hold is automatically placed on every new direct deposit for 5 business days in order for us to verify that the account is a valid open account. If there are no issues, the hold will automatically be released after 5 business days.
  - The employee will receive a paper check if there are any payrolls processed during this 5 day period that they are to be paid on. **If you would like for the direct deposit to be active immediately, choose to “Skip Pre-Note” under the “Pre-Note Status” drop down menu.**

## ***Deduction Setup:***

- Click on **My Team > Employee Information > Employee Information Icon next to the desired employee > Payroll Tab**
- Go to the Deduction section
- Click the 3 dot icon on the far right and select “New Deduction”



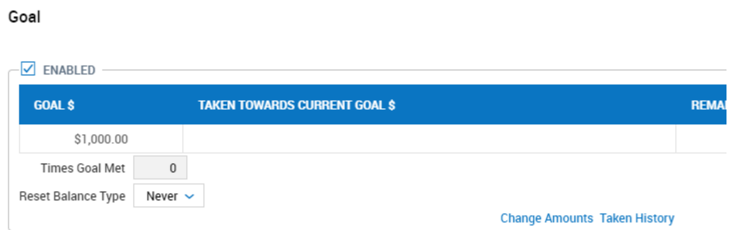

  - Choose the Deduction that you want to setup
  - Enter in the “Begin Date” of the Deduction and leave the “End Date” blank
  - To enter in the amount to be deducted per payroll, you would go to the “Settings” section and enter in the amount in the “Amount $” field
  - **Frequency**: the default is set to “Every Scheduled Pay” – you are able to change this by using the drop down menu and selecting a frequency that fits what you need.




    - **Note:** “Every Pay” includes any additional payrolls from your scheduled payrolls – For example, if you ran a bonus payroll, this deduction would come out of the bonus pay check if you selected “Every Pay” for the frequency.
    - **Be sure to check the Frequency while setting up Deductions!**

        - Check off the Block Last (3rd or 5th) if the Deduction shouldn't be taken out on the third or fifth payroll in the month
    - Click Save at the top right of the screen.

- **Setting up a Goal**: You will be able to setup a Goal after you have saved the Amount that will be deducted from each pay.




    - When the goal section appears, click on the checkbox the "Enabled" checkbox. You can adjust the goal amount by clicking "Change Amounts" and adding in your desired Goal. Once you've clicked "OK", the goal is now setup for this deduction!
        - Example: The system will automatically deduct $50 (scheduled per check amount) from every check until it reaches $1,000 as shown above in the goal amount.
    - At any given time you want to see how much was paid towards the goal or the remaining balance, you would come back to this screen and under Goal, you will able to see the progress.

- **Setup Deduction with a Vendor**: You have the option to apply a Third Party Vendor to the deduction.
    - You must contact Spectrum to have this setup!

## ***Edit Employee Personal Information:***

- Click on **My Team > Employee Information > Employee Information Icon next to the desired employee > Main Tab**, here you will find the employee's demographics, pay rate, dates of employment, etc.
- **Note**: If an employee has an incorrect Social Security Number in the system, you would need to change this as soon as possible. Please also notify your Account Manager know and provide them with the employee's name, incorrect social, and the correct social security number.

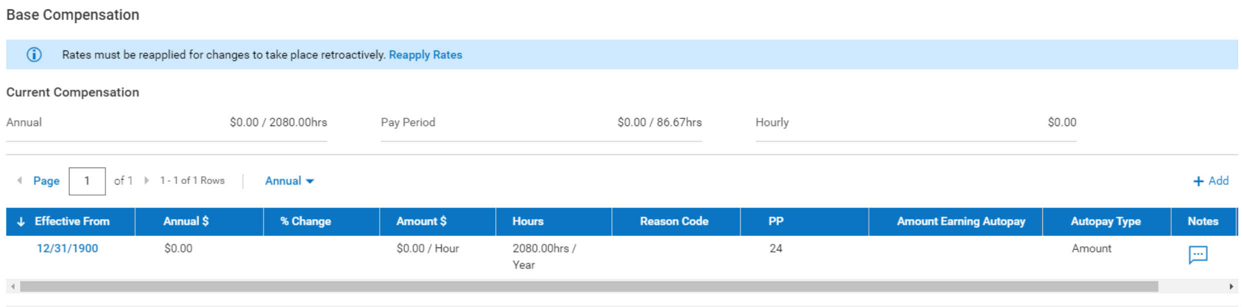
## ***Change Employee Primary EIN:***

- Go to **My Team > Employee Information** and select the employee you want to change. At the top right click on the button that says “SWITCH PRIMARY EIN”.


- Once you select that option a new window will open allowing you to select the new Primary EIN. This feature helps if the employee is active in two EINs but being terminated in one EIN which is not their primary EIN.

## ***Edit Employee Base Compensation:***

- Click on **My Team > Employee Information > Employee Information Icon next to the desired employee > Main Tab**
- Go to the Base Compensation section, click on the “+Add” button on the top right




- If available, select a valid reason for the pay change under the “Reason code”
- Enter in the new amount with an “Effective From” date
    - **Note:** effective date is based on check date not pay period!
- Press Save

## ***Change/Cancel Direct Deposit:***

- Click on **My Team > Employee Information > Employee Information Icon next to the desired employee > Payroll Tab**
- Go to the Direct Deposit section
- To end a direct deposit, click the pencil icon on the far right of the direct deposit account that you're wanting to change and adjust the "**Active To**" date to end it


- The system will automatically issue the employee a paper check if a new direct deposit is not set up after ending the current direct deposit

- If the employee is setting up a new direct deposit, click "+Add" to enter in the new bank account information and the "Active From" date when the direct deposit should become active.

- Note: to see the history on all bank accounts for this employee, select the "All Accounts" drop down under the Direct Deposits section to view

Direct Deposits

Page 1 of 1 1 - 2 of 2 Rows All Accounts

| Type | Active From | Active To | Calc Method | Account Type |
|---|---|---|---|---|
| Direct Deposit | 12/29/2019 | 05/25/2020 | Entire/Remainder | Checking |
| Direct Deposit | 05/27/2020 | 12/31/9999 | Entire/Remainder | Checking |

## ***Change/Cancel Scheduled Deduction(s):***

- Click on **My Team > Employee Information > Employee Information Icon next to the desired employee > Payroll Tab**
- Go to the Deduction section
- To edit or cancel the deduction, use the gray bar to scroll to the right and click on the 3 dot icon under "Actions" and click "View/Edit". Here you can make any edits or end the deduction by adding in the effective end date.


- Note: to see the history of all past deductions for this employee, select the "All Scheduled" drop down under Deductions

## ***Change Employee Tax Settings:***

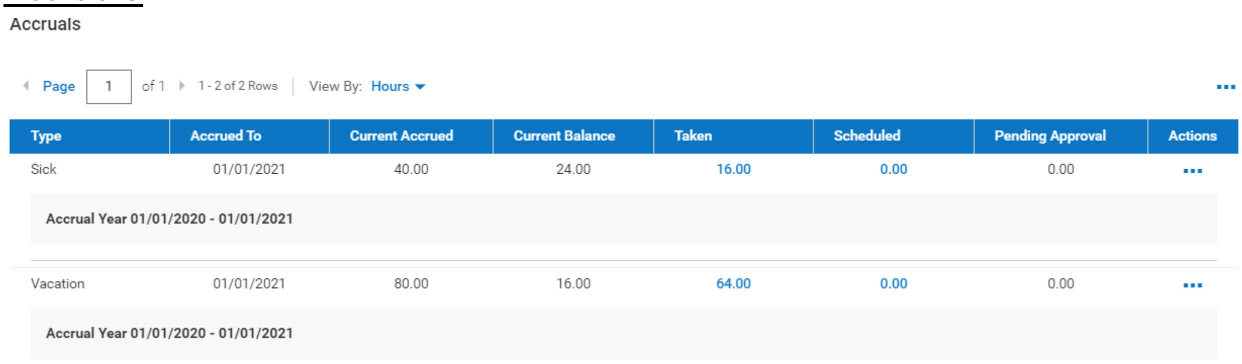
- Click on **My Team > Employee Information > Employee Information Icon next to the desired employee > Payroll Tab**
- Select your tax type and click on the 3 dot icon on the right and then select "Add"


  - Note: by choosing to "Add" a new tax setting instead of editing the previous setting allows for the system to keep a history of the tax settings

- Change the "Date From" to be the effective date of the updated tax settings and fill in the adjusted settings

- Once you have made all the updates, press "Add"

## ***Accruals***

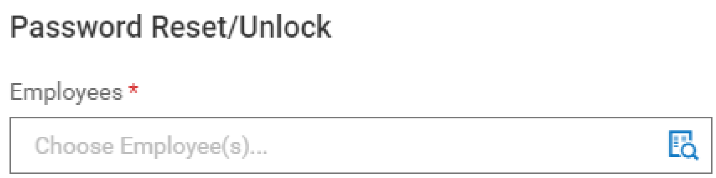



- To check the employee's accrual balance(s), you will go to the Accruals section of their profile under the Main tab. This where you will see the current balance and how much the employee has taken per accrual category.

# Employee Login Issues

## *Unlock Account/Reset Password*

- If an employee's account is locked, there are two options that you can use to unlock them:
    - 1. Go to **My Team > HR > Employee Maintenance > Password Reset/Unlock**
        - Type in the employee's name



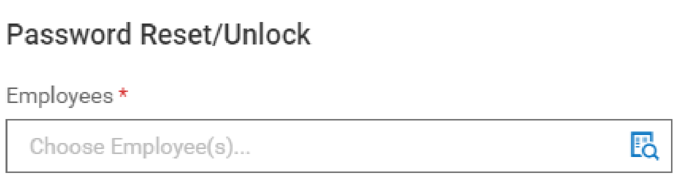

        - Click on "Unlock" which is on the top right on the corner


        - The employee is now unlocked!

    - 2. Click on **My Team > Employee Information > Employee Information Icon next to the desired employee > Main Tab**
        - In the Account Information, there is a checkbox that will be checked off indicating that the employee's account is locked


        - Uncheck the box and hit "Save". The employee's account is now unlocked.


- If an employee needs to have their account password reset:
    - Go to **My Team > HR > Employee Maintenance > Password Reset/Unlock**
        - Type in the employee's name or use the blue icon to search for the employee

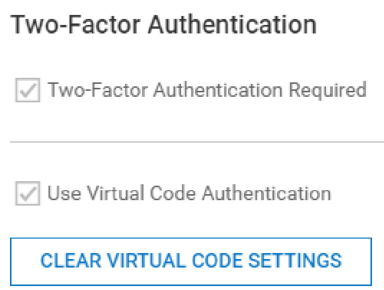


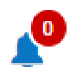

        - Click on "Reset Password" in the top right corner


        - The employee's password will be reset to the last four digits of their social
            - Note: be sure to have the correct social in the system!

## ***Clear Virtual Code Settings***

- If an employee wants to change their phone number or email when receiving their Virtual Code:
    - Click on **My Team > Employee Information > Employee Information Icon next to the desired employee > Main Tab**
    - Go to the **Two-Factor Authentication** section



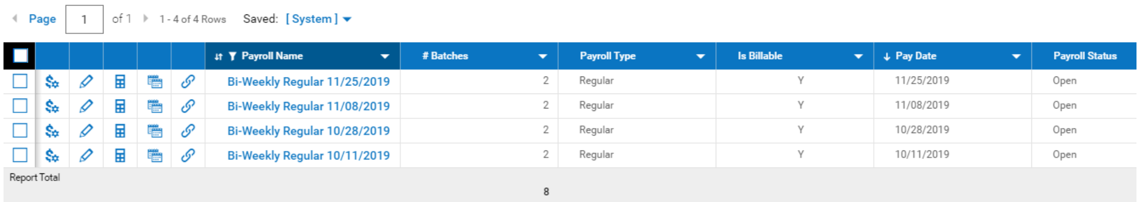

    - Select "Clear Virtual Code Settings" – the employee will have the opportunity to change their number and email the next time they login
    - **Note:** updating an employee's phone number or email on their profile does not change the virtual code settings
- Changes in Virtual Code Settings must be approved within 72 hours to prevent the employee's account from being locked. To do so, the designated approver will login and select the bell icon in the top right. 

    - Any pending virtual code changes can be approved here by the designated approver

# Process Payroll

## *Process Payroll:*

- Go to **My Team > Payroll > Process Payroll**



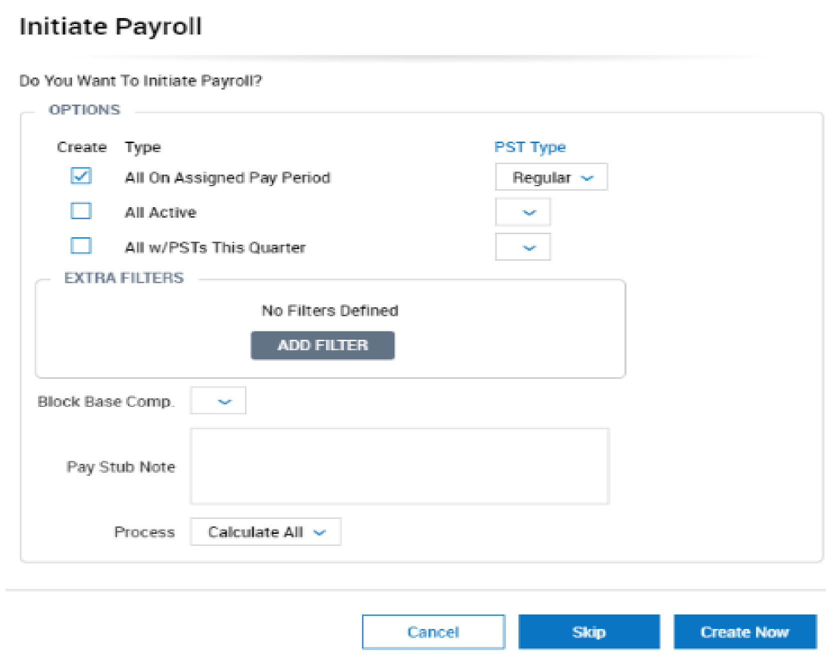
Page 1 of 1 1 - 4 of 4 Rows Saved: [ System ]

| | | | | | | Payroll Name | # Batches | Payroll Type | Is Billable | Pay Date | Payroll Status |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | Bi-Weekly Regular 11/25/2019 | 2 | Regular | Y | 11/25/2019 | Open |
| | | | | | | Bi-Weekly Regular 11/08/2019 | 2 | Regular | Y | 11/08/2019 | Open |
| | | | | | | Bi-Weekly Regular 10/28/2019 | 2 | Regular | Y | 10/28/2019 | Open |
| | | | | | | Bi-Weekly Regular 10/11/2019 | 2 | Regular | Y | 10/11/2019 | Open |
| Report Total | | | | | | | 8 | | | | |

- Click the dollar sign icon ( ). This will take you to the Payroll Prep Process which serves as the payroll dashboard

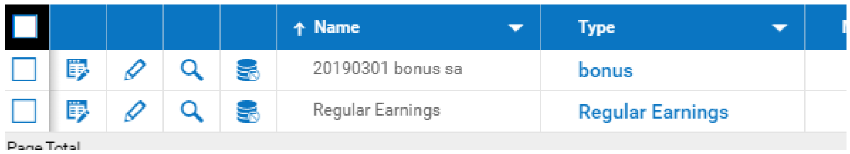
- First, click "**Initiate Payroll**" and a pop-up will appear (refer to the images below)

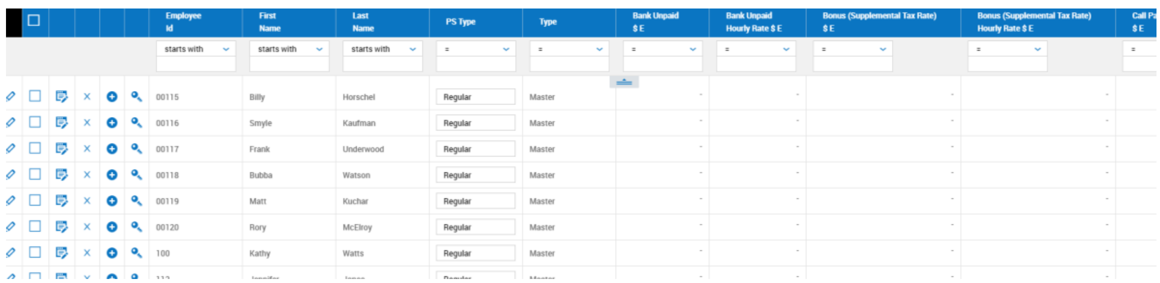

  - Make sure the box is checked for "All On Assigned Pay Period" and also the correct Pay Statement Type is selected
  - If you want to add a pay stub note for *all* employees, you can enter in the Pay Stub Note field
  - Then you will click "**Create Now**"



- Next, click on "**Add/Edit Batches**"


- Click on the first icon ( ) to the left of the "Regular Earnings" batch and this will take you into the batch where you can enter in the employees' hours, commission, bonus, etc.

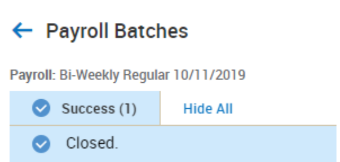


  - **Note:** you can edit your batch setup by going to "Select Columns" and pulling in the columns that you need. Be sure to save your settings as well. If you need any help with this, you can reach out to your Account Manager.

- While inputting the batch data, you can use the "Save" button to save your progress
- After you are completely done entering in the employees' payroll information, **click "Save & Update" then click "Close Batch"**
  - Be sure to do this step! This is crucial because this step will update the payroll and pull the amounts into the pay statements.


- After you clicked "Close Batch", click on the Back button and press it again once more to return to the Payroll Prep Process.




- The next step in the process, to "**View/Add Pay Statements**", is optional
  - If you want to view the employees' pay statement individually, you can view it from this section. It shows a breakdown of the employees' earnings, deductions, and taxes.

- **Payroll Alerts**: Payroll alerts are able to be created within the employee's profile to set a reminder within payroll to check or change something within the employee's pay statement
  - For example: an employee received a pay increase in the middle of the pay period and you want to verify that it is correctly updated within payroll - you can create a payroll alert to remind you to double check the pay increase when you are processing payroll. This can be found in the employee's profile on the Payroll tab under the Payroll Alerts section.

☐ Sign-Off Open Alerts

There are 1 unresolved payroll alert(s).

- Next, click "**Close Payroll**"
  - **Note:** this option only **closes** the payroll but **does not submit** it
  - You can always click to "Re-Open" the payroll if you have any additional changes to make before submitting payroll

☐ Pre Process Payroll (Close Payroll)

☐ View Payroll

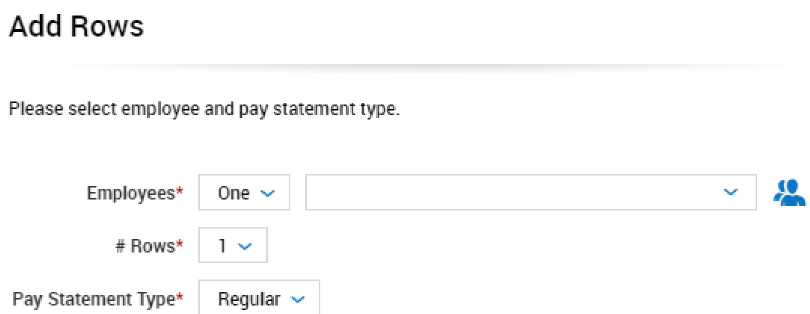
- Review payroll reports before submitting!
- You can use the Payroll Register by PST report to review payroll. This report will show you the breakdown of each employee's pay statement for the pay period: the employee's earnings, deductions, taxes, and net payment.
- You can also use the Payroll Recap & Funding. This report shows the overall total of the payroll.

- Once you have reviewed payroll, you will click "**Submit**" – this is when payroll has been submitted to the system and will notify your Account Manager that payroll is ready to be processed.

☐ Submit Payroll

## Additional Batch Functions:

- **Add Employee to Batch:**
  - If you do not see an employee in the batch (which can happen if you added the employee in the system after payroll was started), click ADD ROWS and a new pop-up will appear.




  - Click on the blue people icon and a list of employees will show. Here you will choose the employee you want to select and then click to add their pay statement to the batch.
  - You can now enter the employee's pay information. If it's a salaried employee, click "Save & Update" and the system will automatically pull in the employee's salary for you.

- **Delete Employee from Batch:**
  - If you do not want an employee to get a check this payroll, simply leave all fields blank (or delete the amount if it's pre-filled). Alternatively, you may click on the X left of the employee's name to delete the employee from the batch.

- **Employee General Changes:**
  - To do the following general changes:
    - Block auto deductions
    - Change hourly rate for this one payroll
    - Add a one-time miscellaneous deduction
    - Block income tax
    - Add an earning that is not available as a column
    - Change department
  - To the left of the employee's name, click on the "Edit Record" icon, there are four tabs by Category, find the appropriate tab that applies to you and make the changes
    - **Note:** changes performed under this section are **not** permanent!

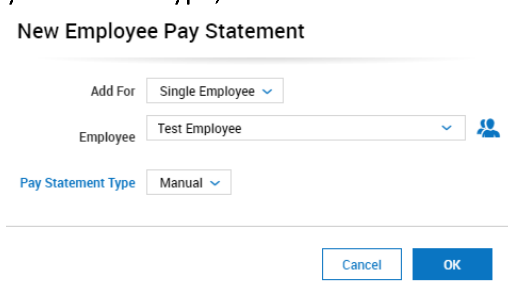
- **Change to a Paper Check for this payroll only:** on the left side of the batch click on the blue icon (when you hover over it with the mouse it will say "edit pay statement"), at the bottom click on utilities > options > under direct deposit you will see the account number and the amount. Change the amount next to direct deposit to 0 and it will be converted to check. You may also change the amount as you desire and the remaining will be paid via check. Click apply changes > on the next screen click save > then click Previous screen to return to the batch.

- **Change Pay Period for 1 Employee:** Follow the steps above, in the Options screen, you'll see the Pay Period from and to dates which can be changed and will reflect those dates on the pay stub
- **Add a Pay Stub Note for 1 Employee:** Follow the step above, in the Options screen, there will be a "Pay Stub Note" section at the bottom where you can enter in your desired note.
- **Add Another Line to an Employee:** click the plus sign next to the employee, this will then add another line for that employee, and you can then enter additional hours or amounts (This is often used when you want to pay an employee with a different hourly rate than their default. You'll have to use the "Select Columns" feature to pull in the necessary "rate" column to manually update the pay rate for the hours on that specific line in the batch)
- **Add a Second Check for an Employee:** Click the plus sign next to the employee, and under "PS Type" column, you will see the option "Regular". Change it to "Regular 2", enter the hours or dollar amount on that line, and any data on this line will be printed on a separate check. If you do not see an option like "Regular 2" for this step, contact your Account Manager for assistance.

## ***Manual Check(s):***

*If you ever have to print a check on your end between one payroll and the next, it can be recorded as follows:*

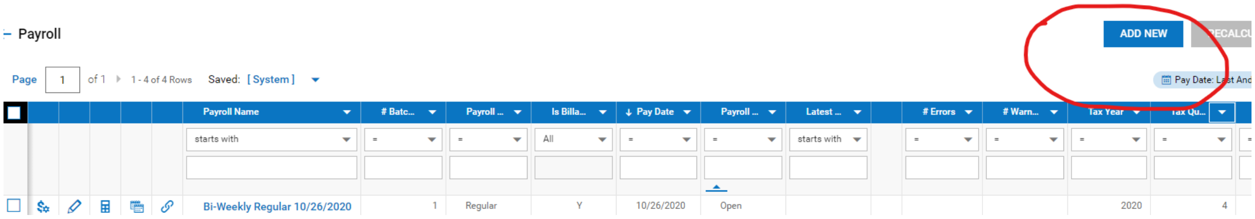
- Go to **My Team > Payroll > Process Payroll**; click into your next scheduled payroll
- Click "Add/Edit Pay Statements" then click "**New Pay Statement"**. Choose the employee and select the "Manual" Pay Statement Type, then click "OK"



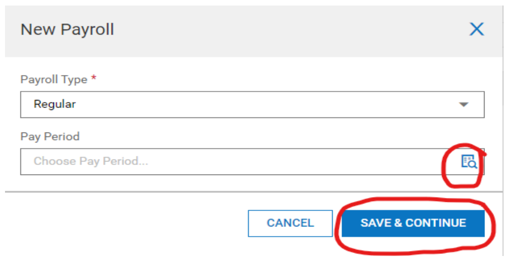

- Enter in the gross amount the employee needs to be paid for (Regular, Salary, Overtime, etc.) and click "Save"
  - To change the pay period that the employee will see on the pay stub, click on "Utilities" and click "Options". In the Defaults section (the $3^{rd}$ column), you will see the Pay Period field – this is where you can manually change the pay period dates reflected on the stub.
  - Note: by default, the pay period showing on the pay stub will be based on the current payroll that you're in.
  - Click on "Apply Changes" to save the changes you just made.
- Click "Utilities" again and select "Close Pay Statement" – make sure you check the "Close Manual Pay Statements" box in the pop-up then click "Close"

# Adding An Additional Payroll:

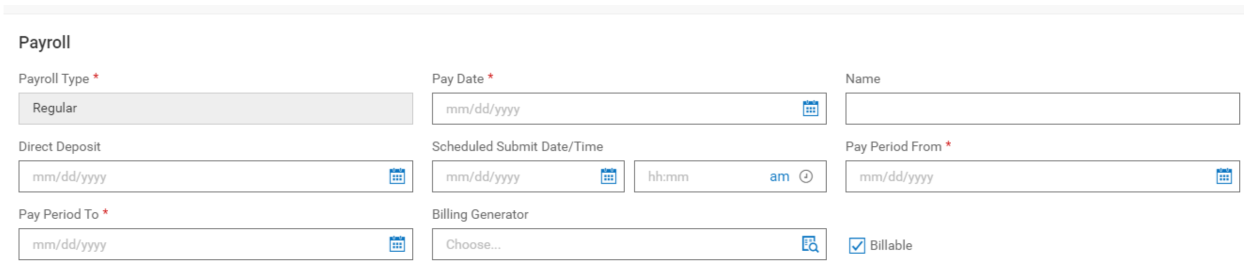
- Navigate to Process Payroll Main Page and select "Add New" at the top left corner of the screen

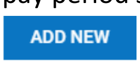


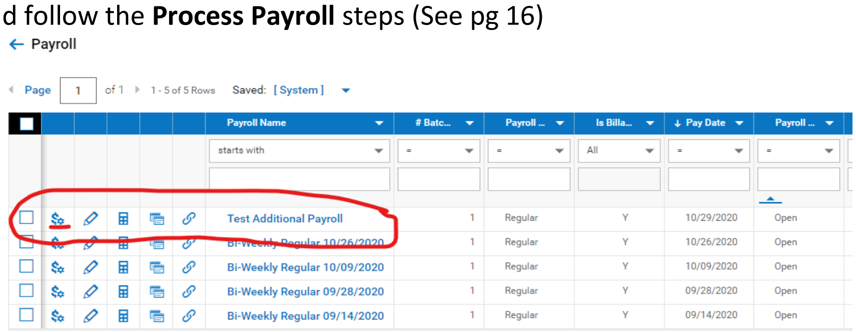
- In the pop up, select the drop down bar to select the payroll type (For additional payroll, it is typically under the Regular category) and then select the Pay Period the Payroll will fall under if applicable, then press Save & Continue




**Fill out required fields marked with** *



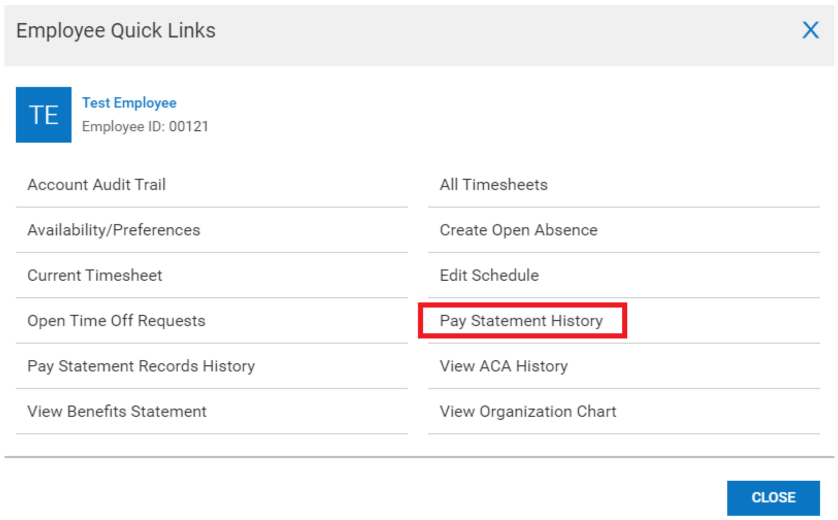

- In-put the Pay Date (***Pay date <u>Cannot</u> be the same day! Must be at least the day after***)
- Name the payroll for future reference
- In-put pay period start/end date (If only for one day, but same dates in "from" and "to" fields)
- Select  in the top right corner; you will receive a notification that the new payroll has been added
- Navigate to main Process Payroll Page and view the New Additional Payroll that you have just added, and follow the **Process Payroll** steps (See pg 16)



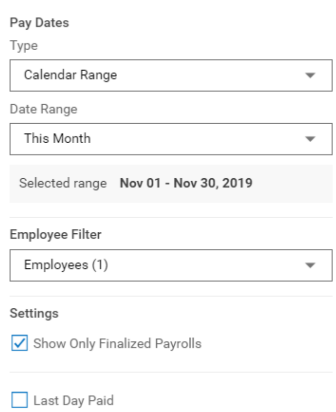
# Reports

## ***Employee Pay History:***

- To view an employee's pay history, go to Click on **My Team > Employee Information** and find the employee's name.
- Click on the "Quick Links" icon that is to the left of the employee's name and a pop-up will appear then click "Pay Statement History"



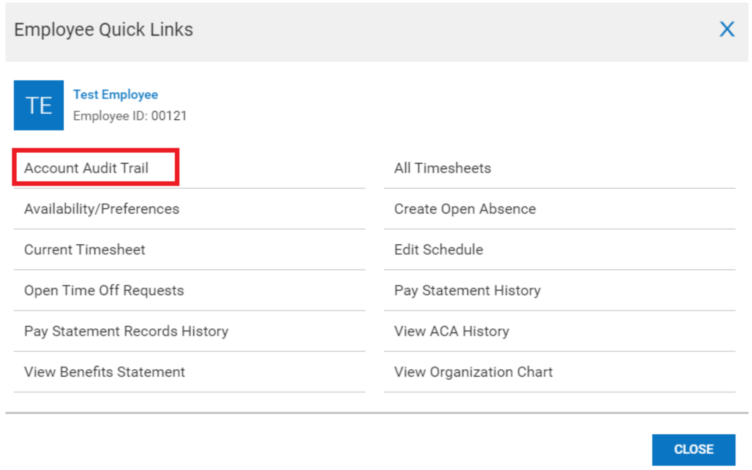

- On the top right, you will see "**Pay Dates**". You can click on this bubble and from here, you will be able to adjust the date filter to the specific date range that you want to view.


- You can change the filter based on the Type and Date Range
- To print the report, click on the 3 dot icon and click "Export"
  - You can then export it to any of the available formats
- If you want to print a pay stub for an employee, you can click on the pay statement icon ( ) next to the desired pay stub. This will bring up the actual check image. Click "Download PDF" – you can now email or print the pay stub using this PDF.

## ***Account Audit Trail:***

- To view a track record of changes made to an employee (address, earnings, deductions, etc.) select the employee and click on Quick Links and click on "Account Audit Trail"




- By default the report is set for "Today". You can change to any given date range to see changes made during that period. The report will show the old and new value as well as the user who made the change.

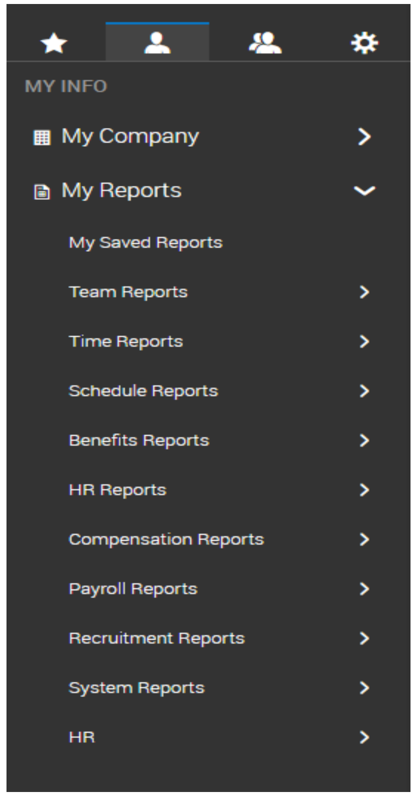
## ***Employee List:***

- To print/export an employee list, go **My Team > Employee Information**
- If you need to remove or add additional columns see the instructions under "Reports Customization" below to see how to add/remove columns
- Once you have your Employee List to your liking, you would Export your report
- Click on the 3 dot icon and click "Export"
  - You can then export it to any of the available formats
- To print an employee's profile in PDF format, check the checkbox on the desired employees
  - Click on the 3 dot icon that is next to the View button and click "Download PDF"


  - You then have the option to uncheck information that you would like to exclude from the report. Then click "Download PDF"

## ***General Reports:***

To create reports, you will go to **My Info > My Reports**. From this view, you have several different reports that are provided to obtain specific information about your company or employees.



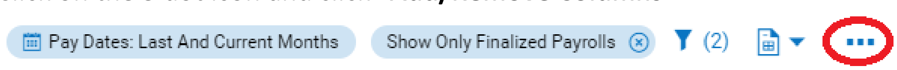
# Reports Customization

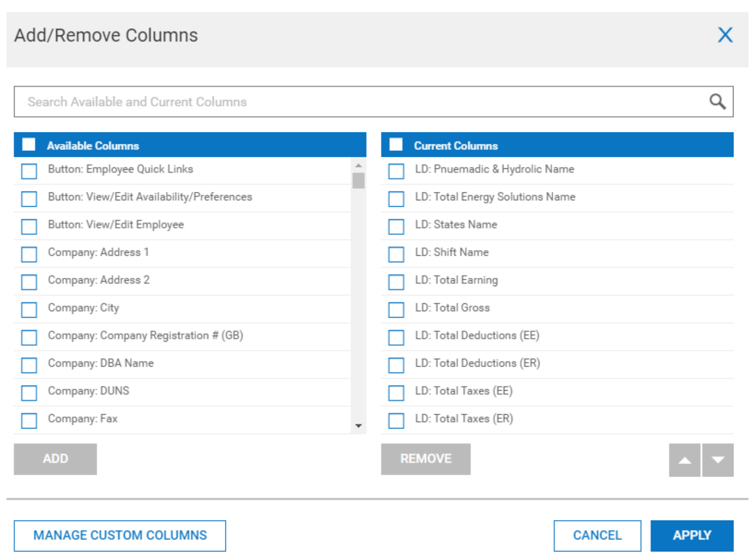
Every screen in our system is designed as a report that can be customized as follows:

- Bring in additional columns
- Remove columns you don't need
- Sort the column order
- Rename column headings
- Save screen layout(s)
- Group by specific columns
- Filtered to only show a certain field, like Dept: Office
- Export to Excel, PDF, CSV, HTML, Text, XML

## ***Add Column(s):***

- You can add in additional columns that are not currently listed in the report – for example, an employee's social security number, their address, etc.
- Click on the 3 dot icon and click "**Add/Remove Columns**"



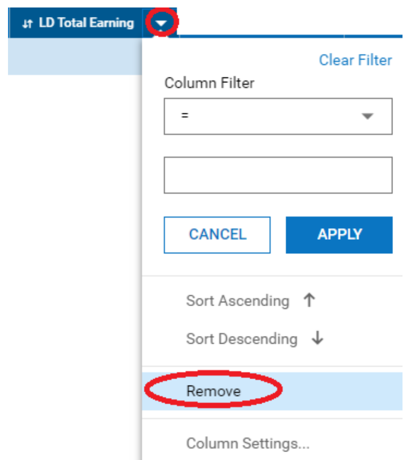

- The left side shows **available columns** to bring in; the right side shows **current columns** in the report.

- Above the column is a search box where you can type in a few letters of a column you are looking for and the system will narrow down the column list
    - For example: if you want to bring in an employee's address, you can type "add" and the system will narrow the list to all columns that include "add" in them.This will help you easily find columns.

- Once you see the column you want, click on the checkbox next to it and click “Add”. This will move the column from the left (available columns) to the right (current columns).
- You are able to adjust the order of your current columns by selecting the column you want to move and then clicking the up or down button. 
- Click Apply and the report will update with the new columns/order.

## ***Remove Column(s):***

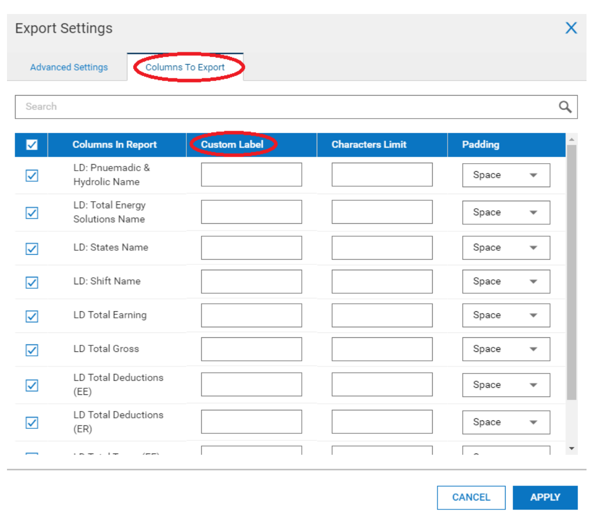
- If there are some columns in the report that you don’t need, you can remove them by clicking on the downwards arrow next to the heading of the column and click “Remove”




- Or you can go back to the “Add/Remove Columns” section and select the desired column under Current Columns then click “Remove”

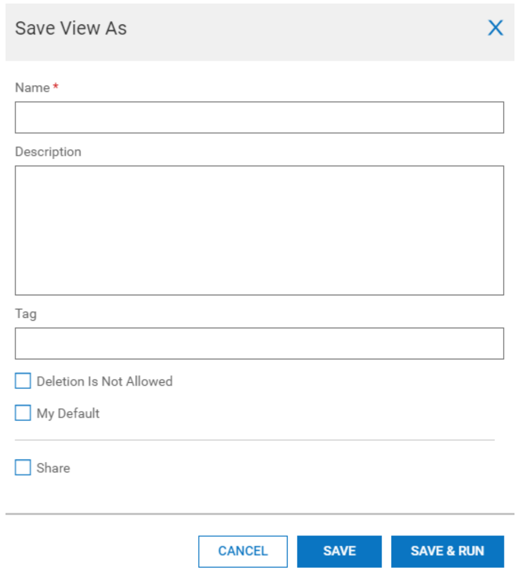
## ***Rename Column Headings:***

- You will click on the 3 dot icon and click “**Export Settings**” and click on the “Columns to Export” tab. You are able to rename the columns headers from here & click apply.



## ***Save Report(s):***

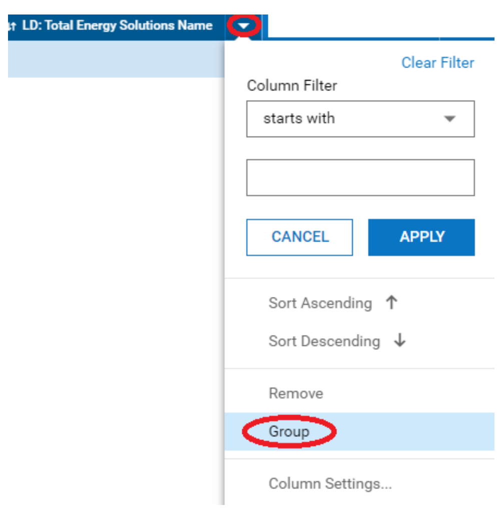
- Once you have added, deleted, or renamed any columns to your liking – you can save your Report by clicking the 3 dot icon and click "**Save Report As**". If you wish to save over the current customized report that you're in, you'll click **"Save As".**




- You can save the report to the name that it pertains to. You can also make this report your default report
    - For example: you've adjusted the report on how you see employees when you view "**Employee Information"** – by clicking "My Default" under the Save View section, the report that you've created and saved will show as the default when you login and go to the Employee Information page in the future.
- Remember to click **Save & Run**!

## ***Group by Column(s):***

- In your report, select the downward arrow on the desired column and click "Group". Selecting group on any given column groups them together and provides a more narrow report. You're also able to ungroup this column by going through the same steps on an already grouped column and selecting to "Ungroup"



## ***Filter Column(s):***

To find information at a faster pace, take advantage of our filter option. Each column has a search field where you can locate information faster.

| Symbol | Definition | Example |
|---|---|---|
| **=** | Entry is exactly this | The entry equals 03/30/06 |
| **! =** | Entry is not this | The entry does not equal 03/30/06 |
| **starts with** | Entry starts with | Entry starts with abc |
| **not starts with** | Entry does not start with | Entry does not start with abc |
| **Like** | Entry is like | Entry contains abc |
| **not like** | Entry is not like | Entry does not contain abc |
| **<** | Entries are less than | The entry is before 03/30/06 |
| **>** | Entries are greater than | The entry is after 03/30/06 |
| **<=** | Entries are not less than | The entry is before or on 03/30/06 |
| **>=** | Entries are not greater than | The entry is on or after 03/30/06 |
| **is null** | Entries that are blank | The entry is blank |
| **is not null** | Entries that are not blank | The entry has been filled in |
| **In** | Entries that include | The entry includes 03/30/06 |
| **not in** | Entries that do not include | The entry does not include 03/30/06 |

## ***Export Report(s):***

- Once you've adjusted your columns and are ready to run your report, go to the 3 dot icon and click "**Export**". You can then export the current report in any of the available formats.