Hover the mouse over the column that needs to be right justified. A dialog box will appear with different options. In this case click on the **right justify** symbol.
Hover the mouse over the **Pay Date** column and then when the dialog box appears, click on **Format Date**.
Click the drop down arrow for **Format** and choose the **03142001 (mmddyyyy)** option.

Click **OK**

Do the same thing for the **Period End Date** column.
12th of the Month Report

- Click **Next** to move to **Step 6 Add Filters**.

- Step 6 is used to limit the output to the set of records needed on the output.

- For this report we only want to see information for the Pay period the contains the 12th of the month.

- We will add a filter statement to limit the report to only include records from the **Pay Date** specified at Runtime.
Click Add a filter statement.

Type “Pay Date” in the Field box and choose Pay Date (Pay Statements) from the list.
12th of the Month Report

Click the dropdown arrow for **Compare with:** and choose **Ask at runtime value.**

Type a descriptive prompt and then click the **Create ...** below.

Click the **Add** button to complete this filter statement.
Click **Next** to move to **Step 7 Run a Report**.

Since a Runtime prompt was created some value needs to be added to the Runtime settings before the report can be Run.

For this report the prompt is asking for a Pay Date. This value can be entered in one of three ways.

1. If you know which Pay Date contains the 12th of the month, it can be entered manually.
2. Click on Choose from Possible Values and select the Pay Date from the list.
3. Click on the Calendar icon and choose the date.
On **Step 7** the **Runtime Settings** can be found by scrolling to the bottom of the screen.

Input a value into the box next to the Runtime setting prompt created in Step 6.

To run the report, click **Run** in the bottom right corner.
This is an example of the output from the 12th of the Month report.
Gross to Net Report
Using the ADP Major Accounts Custom Reporting Submission Tool.

- On the **ADP Support Center** Website there is a tool that can be used to request a report.

- This steps through a few screens asking for details on what is needed. When complete an **ADP Case** is created and dispatched.

- The report template is created based on this information and available for you to use within 48 hours.
Click on **Support** in the upper right corner.

On the Support page under **Support Center Resources**, click on the link for **Support Center Web Site**.
Once the **Support** Center website displays:

1. Expand **Payroll** by clicking on the +.
2. Click on the **Reports** link.
Click on the link for the **ADP Major Accounts Custom Reporting Submission Tool**
Gross to Net Report

Step 1: Identify the user and Specify the Report Name and General Type.

**Form being submitted by:**
- **First Name:** Anthony
- **Last Name:** Albright
- **Phone:** (555) 435-1234
- **Email Address:** Anthony.Albright@email.com
- **Company Code:** ADP
- **Region Code:** 0052
- **ADP UserID:** AAlbright@adp

**Report Title:** Gross to Net Report

**General Report Type:**
- Check View Historical Information / Pay Statement Historical Information
- Accumulator YTD Information
- Benefit Paid Time Off Information
- HR & Benefits
- Time and Attendance

*Click here for Job Aid Instructions*
*Click here for a quick demo on how to complete the custom request form*
**Step 2: Select the fields needed on the report.**

<table>
<thead>
<tr>
<th>Common Fields</th>
<th>CheckView Historical Fields / Pay Statement Historical Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Code</td>
<td>LastName Number</td>
</tr>
<tr>
<td>Home Department</td>
<td>CheckView Code</td>
</tr>
<tr>
<td>Employee Name</td>
<td>Department Worked In</td>
</tr>
<tr>
<td>SSN</td>
<td>Payroll Number</td>
</tr>
<tr>
<td>Status</td>
<td>Pay Date</td>
</tr>
<tr>
<td></td>
<td>Payroll Number</td>
</tr>
<tr>
<td></td>
<td>Period End Date</td>
</tr>
<tr>
<td></td>
<td>Void Chk Indicator</td>
</tr>
<tr>
<td></td>
<td>Week Number</td>
</tr>
</tbody>
</table>

**Earnings - Specify which earnings need to be displayed on the report.**

<table>
<thead>
<tr>
<th>Standard Earnings</th>
<th>Other Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross Pay</td>
<td></td>
</tr>
<tr>
<td>Regular Earnings</td>
<td></td>
</tr>
<tr>
<td>OT Earnings</td>
<td></td>
</tr>
<tr>
<td>Net Pay</td>
<td></td>
</tr>
</tbody>
</table>

- **Specify Earnings**
  - When "Show All" is selected all earnings for each employee will display for every pay period. Each earning amount will display on its own row.
  - Show all Earnings combined as a summary column
  - Show each Earning in its own column
  - Show each Earning on a new line

**Taxes - Specify which tax information needs to be displayed on the report.**

|-------------|-------------|---------------|------------------|-----------------|

**Deductions - Specify which deductions need to be displayed on the report.**

<table>
<thead>
<tr>
<th>Deductions</th>
<th>Show All</th>
<th>Specify Deductions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Show All</td>
<td>Specify Deductions</td>
</tr>
</tbody>
</table>

- When "Show All" is selected all deductions for each employee will display for every pay period. Each deduction amount will display on its own row.
  - Show all Deductions combined as a summary column
  - Show each Deduction in its own column
  - Show each Deduction on a new line

**Memos - Specify which memo amounts need to be displayed on the report.**

<table>
<thead>
<tr>
<th>Memos</th>
<th>Show All</th>
<th>Specify Memos</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In the boxes provided enter the Memo code followed by the Memo Label (i.e. K 401K Match). Each memo amount will display in its own column with the column header showing the contents of the Memo Label.

K 401K ER Match
Gross to Net Report

Step 3: Sorting and Totaling.

Instructions:
This page will list all the fields selected on the previous screen. On this screen three separate functions are going to be addressed.

Display Order:
In the boxes provided number the fields in the order you would like them to display on the report from left to right. First column on the left would be 1 and next column would be 2 etc.

Sort Order:
In the boxes provided number the fields to sort on. The Major sort would be 1 and then the next level would be 2 etc. For example: Company Code 1, Employee Name 2 would list all Employees alphabetically within each Company Code.
Note: Not all fields need to be sorted. Only fields that would make a difference in the display order.

Count/Total:
In the check boxes provide a check mark for any numeric field for which you would like to see a count or a sub-total.
Note: Sub-totals will only show up for fields that were sorted at a higher level. In the example above a sub-total would only show for Company Code.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Display Order</th>
<th>Sort Order</th>
<th>Count/Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Code</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Date</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gross Pay</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regular Earnings</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OT Earnings</td>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net Pay</td>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicare Tax</td>
<td>8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Show each Earning in its own column</td>
<td>9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Soc Sec Tax</td>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Tax</td>
<td>11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SUS/SDI Tax</td>
<td>12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wld State Tax</td>
<td>13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lvd State Tax</td>
<td>14</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wld Local Tax</td>
<td>15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lvd Local Tax</td>
<td>16</td>
<td></td>
<td></td>
</tr>
<tr>
<td>[ADP Enroll]</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Gross to Net Report

Step 4: Specify Filter and Special Instructions.

If you have an existing report that needs to be modified, the Comments (Special Instructions) section would be where the modifications needed are described.
Gross to Net Report

Step 5: Review and Submit.

Please review the information below and click Submit only once. There may be a slight delay while this form is being processed, and you will receive a case number once it is complete. Do not use your browser Refresh or Back button. If you do not receive a case number or email, contact ADP Client Services.

Contact Information
8052 - ADP
Anthony Albright
Anthony.Albright@email.com
AAlbright@adp

Report Information
Report Title: Gross to Net Report
Display Fields (in order)  Sort Fields (in order)  Count/Total Fields
Company Code  Company Code
Employee Name
Pay Date
Gross Pay
Regular Earnings
OT Earnings
Net Pay
Medicare Tax
Show each Earnings in its own column
Soc Sec Tax
Federal Tax
SU/SDI Tax
Wld State Tax
Lvd State Tax
Wld Local Tax
Lvd Local Tax
K-401K ER Match
Show each Deduction in its own column
Specify Memos
Filter Information:
Prompt for a Range of Dates when report is run.
Special Instructions:

Report Template
You can upload a report template example if you have one (optional).

[File Upload]
(Allowed file extensions: .xls, .xlsx, .doc, .docx, .pdf, .rtf, .csv)

[Options]
- Standard - Your report will be available within 48 hours.
- Urgent - Your report will be available on the same day as long as your request is submitted prior to 2:00 PM.

Submit
Cancel
New Custom Reporting Release
ADP has adopted a unified approach to the Graphical User interface called **Visual Design Language**.

1. The Goal is to design a better user experience with an intuitive, engaging and innovating presentation of data and a pleasing visual aesthetic.

2. ADP’s new **Visual Design Language** is built on a collection of foundational philosophies and principles that will guide the process and unify the collection of experiences for our clients.

3. This redesign delivers the framework to continue to deliver future enhancements to improve navigation and task usability for a more intuitive client experience.

Based on this, Custom Reporting will have a new look but what you are used to is still there.
ADPR Enhancements/Roadmap

**Early Summer**
- Enhanced User Experience
  - Redesigned UI

**Late Summer**
- Improved Catalog
  - Field labels match Vantage panels
  - Navigation Path/Field Information
  - Field Preview

**Fall**
- Delegation/Scheduling
  - Delegate scheduled reports
  - Enhance reports copy (copy runtime settings)
  - Scheduled reports

---

Set Up New Report — ACA Affordability Worksheet

Current Step — Select Fields

Find Fields

� © 2014 ADP, LLC
Step 1 – Name Your Report

Provide information about the report you want to create. The report title is displayed on the report.

Report Type
- Columnar
- Form
- Data Extract File
- Mailing Labels

Report Mode
- Private
- Public

Report Name *
Projected Salary with 3% Increase

Report Title *
Projected Salary with 3% Increase

Description

Report Setup Folder

Enter or select a folder
Step 2 – Select Fields Enhancements

Ability to filter by area simplified
Adding link to Field Mapping Guide

Set Up Report - Projected Salary with 3% Increase

Step 2—Select Fields
Select the fields that you would like to add to your report. You can narrow your choices by searching. You can change the display order of your selected fields now or in Step...
Step 2 – Select Fields – Calculated and Coded Fields

Other link renamed to “Calculated Fields”
Step 3 – Select Sort Order

Set Up Report - Projected Salary with 3% Increase

Step 3—Select Sort Order

Select the fields you want to sort on. You can change the sort order and specify whether the details appear as ascending or descending.
Step 4 – Specify Totals

Set Up Report - Projected Salary with 3% Increase

Step 4—Specify Totals
Select the fields you want to use for totals, subtotals, counts, and other functions in your report.

<table>
<thead>
<tr>
<th>Sort Order</th>
<th>Show in Header</th>
<th>Field</th>
<th>Count</th>
<th>Count Distinct</th>
<th>Min Value</th>
<th>Max Value</th>
<th>Average</th>
<th>Total</th>
<th>Break</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st</td>
<td></td>
<td>Home Department Description</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Payroll Name (Personal Info)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Annual Salary (Pay Rates)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Projected Salary Increase</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

New Line ✓
Step 5 – Select Format

Easy to access Report Format options

Set Up Report - Projected Salary with 3% Increase

Step 5—Select Format

Format your report using this advanced visual designer that lets you see changes before you run the report. Switch to the Standard Formatter if you want to use more standard formatting techniques.

Page Layout

Page Size
- Letter (8.5 x 11 inches)

Orientation
- Portrait
- Landscape

Report Format

- Wrap Column Titles
- Odd/Even Row Coloring
- Borders on Cells
- Suppress Zero Values
- Print Runtime Settings
- Company Logo
- Report Title
- Report Date and Page
- Report Generation Time
- Powered by ADP
- Gap Between Columns
## Step 5 – Select Format – Bottom portion

### Projected Salary with 3% Increase

<table>
<thead>
<tr>
<th>Home Department Description</th>
<th>Payroll Name</th>
<th>Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Xxxxxxxxxxxxxxxxxxxxxx</td>
<td>Xxxxxxxxxxxxxxxxxxxxxxxxxxx</td>
<td>$1,234.0</td>
</tr>
<tr>
<td>Xxxxxxxxxxxxxxxxxxxxxx</td>
<td>Xxxxxxxxxxxxxxxxxxxxxxxxxxx</td>
<td>$1,234.0</td>
</tr>
<tr>
<td>Xxxxxxxxxxxxxxxxxxxxxx</td>
<td>Xxxxxxxxxxxxxxxxxxxxxxxxxxx</td>
<td>$1,234.0</td>
</tr>
<tr>
<td>Xxxxxxxxxxxxxxxxxxxxxx</td>
<td>Xxxxxxxxxxxxxxxxxxxxxxxxxxx</td>
<td>$1,234.0</td>
</tr>
</tbody>
</table>

**Totals for Home Department Description Xxxxxxxxxxxxxxxxxxxxxx**

- **Total**: $1,234.0

Generated on 03/04/2015 03:18 PM

Powered by ADP
Step 5 – Select Format

Set Up Report - Projected Salary with 3% Increase

Step 5—Select Format

Format your report using this advanced visual designer that lets you see changes before you run the report. Switch to the Standard Format if you want to use more standard formatting techniques.

Page Layout

- Page Size: Letter (8.5 x 11 inches)
- Orientation: Portrait

Report Format

- Wrap Column Titles
- Odd/Even Row Coloring
- Borders on Cells
- Suppress Zero Values
- Print Runtime Settings

Projected Salary with 3% Increase

<table>
<thead>
<tr>
<th>Home Department Description</th>
<th>Payroll Name</th>
<th>Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Xxxxxxxxxxxxxxxxxxxxxxx</td>
<td>Xxxxxxxxxxxxxxxxxxxxxxxxx</td>
<td>$1,234.0</td>
</tr>
<tr>
<td>Xxxxxxxxxxxxxxxxxxxxxxx</td>
<td>Xxxxxxxxxxxxxxxxxxxxxxxxx</td>
<td>$1,234.0</td>
</tr>
<tr>
<td>Xxxxxxxxxxxxxxxxxxxxxxx</td>
<td>Xxxxxxxxxxxxxxxxxxxxxxxxx</td>
<td>$1,234.0</td>
</tr>
<tr>
<td>Xxxxxxxxxxxxxxxxxxxxxxx</td>
<td>Xxxxxxxxxxxxxxxxxxxxxxxxx</td>
<td>$1,234.0</td>
</tr>
<tr>
<td>Totals for Home Department Description Xxxxxxxxxxxxxxxxxxxx</td>
<td>Total</td>
<td>$1,234.0</td>
</tr>
</tbody>
</table>

Generated on 03/04/2015 02:16 PM

Powered by ADP
Step 6 – Add Filters

Set Up Report - Projected Salary with 3% Increase

Enter criteria if you want to filter the results that are included in your report.

Filter Builder

Home Department Code (Job Profiles) = 001000

Filter Preview

Home Department Code (Job Profiles) = 001000
Step 6 – Add Filters – Ask at Runtime Prompt

Simplified creation of a Ask at Runtime parameter and it’s label

Set Up Report - Projected Salary with 3% Increase

1. Name Your Report  
2. Select Fields  
3. Select Sort Order  
4. Specify Totals  
5. Select Format  
6. Add Filters  
7. Run a Report

Step 6—Add Filters
Enter criteria if you want to filter the results that are included in your report.

Filter Builder

Filter Statement
Field: Home Department Code (Job: Q)  Operator: in (list of values)  Compare With: Ask at Runtime Value

Filter Preview
Home Department Code (Job Profiles) in <Blank>

Select Department  
Default Value:  
Case Sensitive

Select or Add Values  
CANCEL  SAVE

COPY  CANCEL  SAVE

PREVIOUS  NEXT
Step 7 – Run a Report

Reordered the runtime page to put the items that are most important at the top:

- Effective Date
- Ask at Runtime Values
- Ability to Save and Close
Step 7 – Run a Report – Runtime Settings

Set Up Report - Projected Salary with 3% Increase


Step 7—Run a Report

To process the report, make the necessary selections and click Run.
This report will return unique records.

Runtime Settings

Print settings on report

Effective Date
- Effective as of a given date
- Report run date
- +/-: days

Ask at Runtime Values

Enter increase percentage *
1.03

Select Department *
001000, 010000, 01100

Select or Add Values
Step 7 – Run a Report – Output Settings and Notification

Output Settings

Language *

- English (US)

Report Title *

- Projected Salary with 3% Increase

Default Format *

- XLS

Output Folder:

- Enter or select a folder

Maximum # of records

- 40000

- [ ] Return unique records only

- [ ] Show totals only

Notification

- [ ] Notify me when the report is ready to be viewed
Step 7 – Run a Report – Schedule and Summary

<table>
<thead>
<tr>
<th>Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule Recurrence: No schedule assigned</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Summary</th>
</tr>
</thead>
</table>

COPY CANCEL SAVE PREVIOUS RUN
Step 7 – Run a Report – Full screen

Set Up Report - Projected Salary with 3% Increase

Step 7 – Run a Report
To proceed, enter the necessary selections and click Run. This report will return unique records.

Runtime Settings
* some settings are optional
  * mandatory data
    - Effective as of a given date
    - Report run date
    - #: days

Ask at Runtime Values
Current department:
Cash, Benefits, HR
Select or Add Values

Output Settings
* Some settings are optional
  * Language:
    - English (US)

Report Title:
Projected Salary with 3% Increase

Default Format:
XLFS
Output Folder:
Enter or select a folder

Minimum of elements:
40000
Select unique records only

Schedule
Schedule Recurrence: No schedule assigned
Set Schedule and Distribution

Notification
Notify me when the report is ready to be viewed

Summary
ADP Reporting Enhancements
New Information Available When Selecting Fields

Set Up New Report — ACA Affordability Worksheet

Current Step — Select Fields
Select the fields that you would like to add to your report. You can narrow your choices by searching. You can change the display order of your selected fields now or in Step 6.

Find Fields

Selected Fields

1. Group Name
2. File Names (Job Profiles)

Field Mapping Guide

CANCEL  SAVE

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Wrap Up
Formal Training

- We highly encourage you to attend ADP training if you have not yet done so

- The following complimentary courses are available on Learn@ADP:
  - ADP Reporting Basics - (2.5 hour instructor-led virtual training)
  - ADP Reporting Advanced Filtering - (1.5 hour instructor-led virtual training)

See this link on Support Center Home Page and/or the Quick Start guide in this demonstration’s handouts.
Reporting Resources on Support Center Home Page

24/7
Online community to network with other ADP clients

1-2 ADP Pro Reporting Sessions per Month

Reporting break out sessions
Speak to an ADP Reporting Professional

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ADP Reporting Support Center Resources

Support > Support Center Web Site > Support Center Home Page > Payroll >

• Tools/Forms >
  o ADP Major Accounts Custom Reporting Submission Tool
    ▪ No cost and no phone call

• Documents >
  o Data Reference Guides
Learning Bytes can be displayed on any screen in Custom Reporting
ADP Reporting On Line Help

On Line Help can be displayed on any screen

Setting Up a New Report

Show Me How

To set up a new report, perform the following sequenced steps:

1. Step 1: Name Your Report
2. Step 2: Select Fields
3. Step 3: Select Sort Order
4. Step 4: Specify Totals
5. Step 5: Select Format
6. Step 6: Add Filters

Additional Information

- Setting Up a New Report
- Excluding Archived Employees from Your Custom Reports
- Including Historical Pay Dates in a Custom Report
- Reporting on Regular Pay When Not Using Effective Dating
- About the Manage Files Tab
- About Common Fields
Email Your Questions to Technical Services

Central Service Center - 34, 60, 62 & 69
CentralTechnicalServices@adp.com

Northeast Service Center – 56 & 10
NortheastTechnicalServices@adp.com

NY Metro Service Center – 20 & 40
NYMetroTechnicalServices@adp.com

South Service Center – 30, 32, 36, 52 & 55
SoutheastTechnicalServices@adp.com

West Service Center – 70, 73, 75 & 76
WestTechnicalServices@adp.com