Reporting on Payroll

This topic guides you in using the most popular, standard payroll-related reports in Wurk and customizing and saving your own for re-use, sharing, and export, on systems upgraded the latest Wurk release. You may wish to use payroll reports in Wurk, for example, to summarize financial activity for executives, record-keeping, or to get a sophisticated overview of your organization's payroll expenditures.

Menu items and on-screen options may vary depending on your configuration and Security Profile.

START HERE

1. If your goal is analyze and report on your payroll, begin by Learning About Payroll Reports

If you want to share a Dashboard with another Wurk user, see Sharing Dashboards.

> **What is a Dashboard?**
> Wurk provides a *main* dashboard with tabs along the top for each module you have permissions for (managers will see more tabs than regular employee). A dashboard contains widgets with summary information and links to drill down to more details. You navigate to the main Wurk dashboards from the main menu (wherever you see Dashboard as a sub-link) and from the **Home** page (just click **Home** at the bottom of the main menu). The Team **Time** Dashboard, for example, summarizes time entries and trends for people who report to you if you are a manager. If your dashboard does not look like the example shown here, either your Administrator has customized it or it still needs to be configured. If your company has built you a custom dashboard, you can navigate to it at bottom of the Main Menu (click **Dashboard**). You can also configure your own dashboards by building your own reports and then saving them as charts. Your Administrator or manager can also do this for you and then share the dashboard with you. If you need help with this, you or your Administrator should contact your Wurk Account Manager.

2. Next, learn about the reports most users typically need for payroll reporting in Locating Payroll Reports in Wurk

3. Once you have learned about payroll reports and where to find them, you can customize, save and share them with others:

Saving Your Report

4. Click the Actions ••• menu and **Save View As**. Give your report an easy name.

Save View As ✕

Name *

Custom Payroll Report

5. Enable sharing with other Wurk users.

☑ Share

  ⦿ Share With Others

    All Employees ▼

  ◯ Share With All

6. SAVE. Once you have saved a view, you will see it in the "Saved:" list at the top of the report (and in My Info>My Reports>My Saved Reports on the main menu).

◁ **Page** [1] of 1 ▷ 0 Rows   Saved: **Custom Payroll Report** ▼

Exporting Your Reports

7. Under the Actions ••• menu are **Export** and **Export Settings** options, where you can set up the report to export to a particular file type.

8. Under Export Settings, the **Advanced Settings** tab lets you set up the visual appearance of the report for export, such as margins, font size, etc.

Export Settings

| Advanced Settings | Columns To Export |

Layout

Landscape ▼

Margins

Top   Right   Bottom   Left

Font Size

7 ▼ ⓘ

Page Break

No Page Break ▼

☑ Display Header/Footer

☑ Display Column Names

Export Dash As ⓘ

  ⦿ Default

  ◯ Empty

  ◯ Custom

☑ Display Totals