

Create Custom Reports

Go to: helpside.com -> Employee -> Timeclock and login with your username and password.

Step 1: Click on **Reports Menu**.

Step 2: Click on **Manage Custom Reports**.

Step 3: Click **Add New Report**.

The screenshot displays the 'Custom Reports Manager' interface. On the left, the 'Reports Menu' is highlighted with a red circle and the number '1'. Below it, the 'Manage Custom Reports' option is highlighted with a red circle and the number '2'. At the bottom of the sidebar, the 'Add New Report' button is highlighted with a red circle and the number '3'. The main content area shows a table with one entry: 'Pay Rate Changes' in both the Title and Description columns.

| Title | Description |
|------------------|------------------|
| Pay Rate Changes | Pay Rate Changes |

Step 4: Enter the Report Name

Step 5: Enter the Report Description.

Step 6: Select which fields(s) from the Employee Setup page to include on the report.

Step 7: Choose which **Time Card Data** To include from the employee. This can also include “Clock Prompts” collected when the employee punches in/out/

Step 8: In the **Column Order**, click and drag the columns into the order that works best for you.

Step 9: Additional filtering is available for those fields with drop down menus.

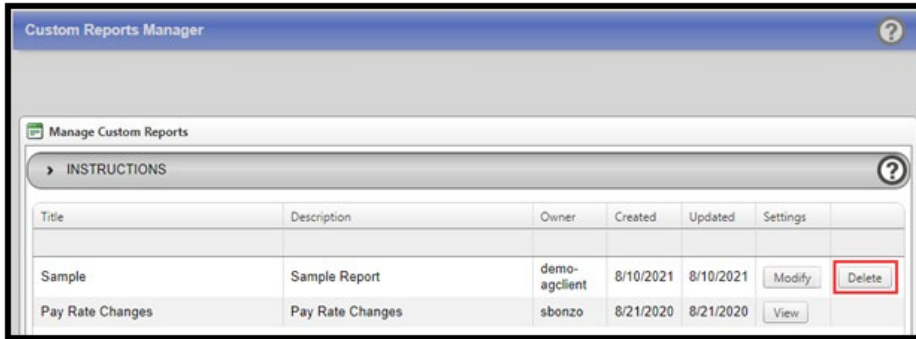
Step 10: Select **Supervisor Level Logins** to allow supervisors to access and view this report. Supervisors will only be able to view employees based on their visibility permissions.

Step 11: Click **Save**.

The screenshot shows the 'Custom Report Settings' window. It contains the following elements:

- Report Name:** A text input field with 'Sample' entered, marked with a red circle 4.
- Report Description:** A text input field with 'Sample Report' entered, marked with a red circle 5.
- Employee Setup Data Fields:** A section titled '(Select fields to display)' marked with a red circle 6. It contains a grid of checkboxes for various fields. 'Last Name' and 'First Name' are checked.
- Time Card Data:** A section titled '(Select fields to display)' marked with a red circle 7. It contains checkboxes for 'Hours', 'Unpaid Hours', 'Category', 'Missing Punches', 'Pay Rate', 'Edited Punches', 'Wage', and 'Additional Pay'. 'Hours' and 'Category' are checked. A sub-section 'Clock Prompts' is highlighted with a red box, containing checkboxes for 'Job', 'Project', and 'Customer'.
- Column Order:** A section titled '(Click and drag columns to change their order)' marked with a red circle 8. It shows a list of columns: 'Last Name', 'First Name', 'Hours', 'Category', and 'All'. The 'All' column is selected in a dropdown menu, marked with a red circle 9.
- Supervisor Access:** A section titled '(By default, all Client (Manager) level and above users can access this report. Check below to allow Supervisor level users to also access this report.)' marked with a red circle 10. It contains a checkbox for 'Supervisor Level Logins can access this report'.
- Buttons:** 'Cancel' and 'Save' buttons are located at the bottom right, with the 'Save' button marked with a red circle 11.

You have to option to delete the report after it's been saved by clicking the delete button on the right.



Run Custom Reports

Step 1: Click on **Reports Menu**.

Step 2: Click on **Custom Reports**.

Step 3: Select the date range you would like to run the report for.

Step 4: Select the employees to include on the report.

Step 5: Click on the **Report Name** to run the report.

