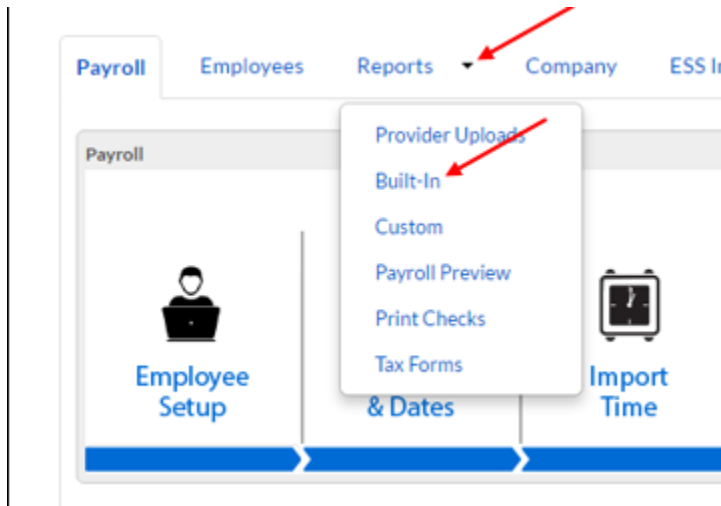
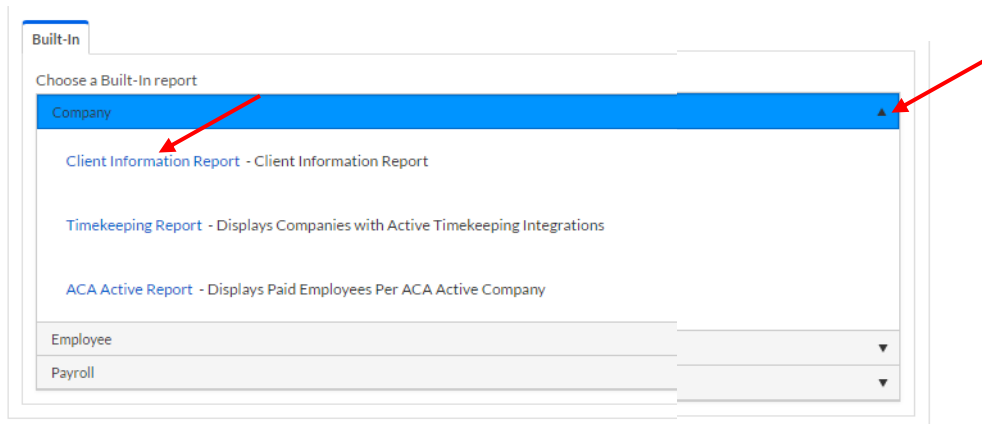


## CPO Phoenix Built-In and Custom Reports

CyberPay Online Phoenix offers users the ability to run a variety of built-in reports. To run a built-in report select the “Built-In” option from the Reports menu. Built-In reports offer the most popular selections from CyberPay that clients can run as needed.



Built-in reports are organized by category and can be selected as needed. Each category has multiple reports to choose from. Choose a report to run by clicking on the the blue title text.



Choose options as desired and Run.

Client Information Report

**Search by**

All Companies

Select Company  --Please Select--

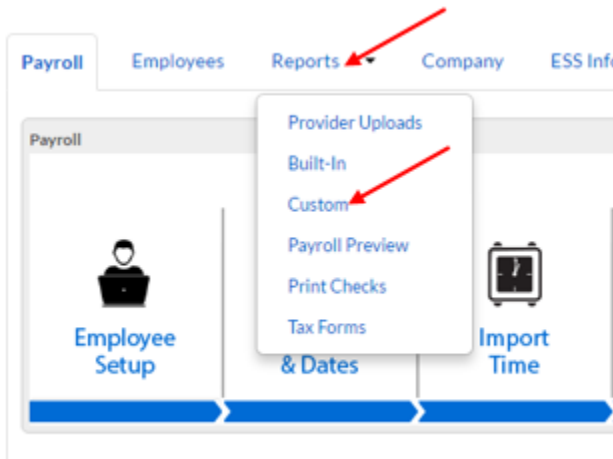
Save Filter Criteria

Results will show at the bottom of the page. Reports can be exported to PDF by choosing “Export to PDF” where you can print and/or save. Some reports can be exported to Excel by choosing “Export to Excel”.

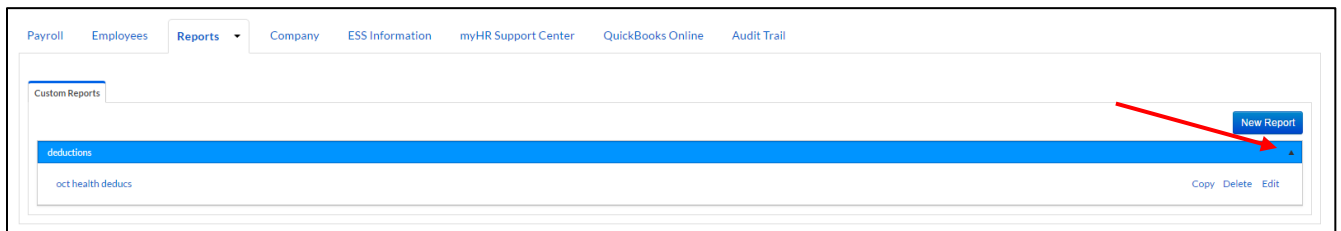
Company	Employee	YearID
CRFD - Creekwood Fire Department	Parnell, Reginald	2016
CRFD - Creekwood Fire Department	Parnell, Reginald	2017
CRFD - Creekwood Fire Department	James, Damon	2016
CRFD - Creekwood Fire Department	James, Damon	2017
CRFD - Creekwood Fire		

CyberPay Online Phoenix also offers users the ability to create custom reports/exports. Users are able to pick the type of report and the fields that they wish.

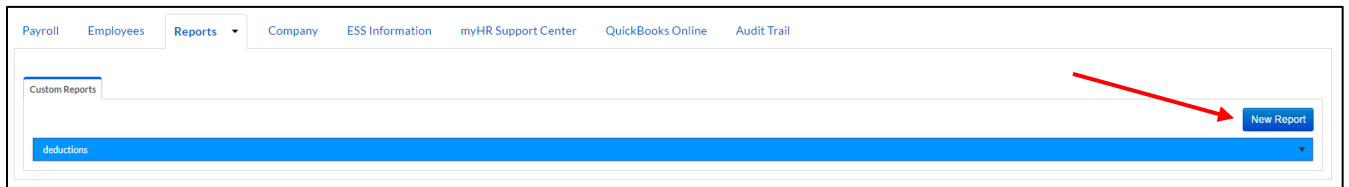
To create new reports/exports (or to view saved ones), select the “Custom” option from the Reports menu.



Custom reports can be saved by category. To work with a saved report, click on its category’s name, drop list, or anywhere on the title bar. Then, click on the desired report name to run/view it. You may also click “Copy” to copy the report to another company, “Delete” to remove the saved report, or “Edit” to make changes to the report.



Click the “New Report” button to create a new report.



Select the type of report and the desired Company. Click the “Next” button to continue.

**Custom Reports Wizard - Select Report Type**

Select Report Type

Company Info  
 Employee Setup  
 Payroll

Company Code: PHNX - My Phoenix Company ▼

Pick the fields that you wish to show on the report. To select all of the fields in a table, check the “Select all” option above it. Most tables, have related (more detailed) records in a second table. When you select a field from one of these tables, the related table will appear. For example in the image below, when a pay type is selected in the 2<sup>nd</sup> table on the left, a detail table appears on the right. This allows you to include more information about the selected pay type such as hours and pay (pay amount). Once you have finished your sections, click the “Next” button to continue.

**Custom Reports Wizard - Select Attributes**

Select Fields  Select all

- Auto Correct Only
- Check Date
- Check Number
- Company Code
- Employee ID
- Employee Name
- Gross Pay
- Hours
- Hours Paid
- Net Pay
- Reimbursement
- Run ID

Select Pay Types  Select all

- 1099
- Auto Fringe
- Bonus
- Charge Tips
- Double Time
- EMT
- EMT OT
- ExpenseReimbursement
- Fire Incentive
- Fire Training
- Fringe Benefit
- Haz Mat

Select Pay Types Attributes  Select all

- Annual Pay
- Aux Liab
- Aux Tax 1
- Aux Tax 2
- Check Stub Abbrev
- Class
- Department
- Division
- Hours
- Job Description
- Job ID
- Location

The report will be shown at the bottom of this screen. You may wish to save the report by entering a “Report Name” and “Report Group Name” and clicking the “Save” button. You may also enter criteria into the filters to narrow the results. Click the “Export to Excel” button to export your data to an Excel file or “Export to PDF” to see the report and save and/or print.

<span>Export to PDF</span> <span>Export to Excel</span>		
Company	Employee	YearID
CRFD - Creekwood Fire Department	Parnell, Reginald	2016
CRFD - Creekwood Fire Department	Parnell, Reginald	2017
CRFD - Creekwood Fire Department	James, Damon	2016
CRFD - Creekwood Fire Department	James, Damon	2017
CRFD - Creekwood Fire		

Custom Reports can require a little bit of trial and error to get what you want. You have to know what to ask for to get the results that you desire. Three common report setup examples are shown here to get you started. Remember that if you want to be able to filter a category in a report it has to be included in the setup.

#### End of Year All Hours Report

1. From the Custom menu choose New Report and Payroll
2. Choose Company and press Next. Currently no reporting across companies so reports will have to be run on a company by company basis.
3. Choose Employee Name, All Pay Types and Hours
4. Press Next
5. Export to Excel
6. Enable editing and sort by name
7. Subtotal each employee

15  Select all

- Auto Correct Only
- Check Date
- Check Number
- Company Code
- Employee ID
- Employee Name
- Gross Pay
- Hours
- Hours Paid
- Net Pay
- Reimbursement
- Run ID

25  Select all

- 1099
- Auto Fringe
- Bonus
- Charge Tips
- Double Time
- EMT
- EMT OT
- ExpenseReimbursement
- Fire Incentive
- Fire Training
- Fringe Benefit
- Haz Mat

25  Select all

- Annual Pay
- Aux Liab
- Aux Tax1
- Aux Tax2
- Check Stub Abbrev
- Class
- Department
- Division
- Hours
- Job Description
- Job ID
- Location

Employee Name	Fire Incentive Hours	Hourly Hours	Mileage Hours	Oregon Pay Hours	Overtime Hours	P
Ayon Ricardo						
Ayon Ricardo		49.03				
Ayon Ricardo		0				
		956.3	0	0		16
Ball Jackson		40				0

YTD All Earnings Check View Report

1. From the Custom menu choose New Report and Payroll
2. Choose Company and press Next
3. Choose Check Date and Employee Name from first box
4. Select All Pay Types needed and Pay from the related table
5. Press Next
6. Export to Excel, enable editing and sort by employee name
7. Subtotal each employee

### Certain Pay Types and Deductions Report

1. From the Custom menu choose New Report and Payroll
2. Choose Company and press Next
3. Choose Check Date, Employee Name and Gross Pay
4. Choose needed Pay Types and Pay from the related table
5. Choose needed Deduction types and Amount from the related table
6. Press Next
7. Use the Custom Range feature to select from and to date needed
8. Export to Excel, enable editing and sort by employee name
9. Subtotal each employee