Introduction

This quick reference will help you get started using Simplified Reporting. The steps by step procedures will guide you to do the following:

- Create and run a simple report
- Organize and manipulate the data in your report output
- Create a simple chart from your report output (requires that you have ADP Analytics\(^1\))

Creating and Running a Simple Report

1. Select Reports > Custom Reports > Set Up New.

2. Enter a report title.

3. Select a folder to create your report in (optional).

4. Add a description (optional).

5. Click Select Fields.

6. Select the fields you want to include in your report.

Tip: As you are selecting fields, if one or more reports that match your needs already exist, a list of recommended reports appears at the bottom of the page. You can choose to use one of these reports in place of the one you are creating, or you can select individual fields that are included in these reports and add them to your own.

1. If you don’t have ADP Analytics but are interested in finding out more about it, contact your ADP sales representative.
7 Click Filters if you want to add one or more simple filters to your report.

8 Review your report preview and make changes, if needed, as follows:
   a. Click the Actions menu at the top of the column where you want to make the change.
   b. Select the appropriate option.
   c. Make your changes.

9 Click Save and Run.

10 Select your runtime settings and then click Run.

11 Make changes to your report output, if needed (see the procedure that follows, Organizing and Manipulating the Data in Your Report Output).

12 Click Export and select a file type.
Organizing and Manipulating the Data in Your Report Output

After you run your report, you can manipulate the data in the output by creating groups and subgroups based on the fields in your report, and by applying aggregate functions (numeric, date, and string) to the fields in your report (for example, to include totals and subtotals in your report).

Note: If you are already viewing your report output, go directly to step 3.

1. Select Reports > View > Reports Output.
2. Locate and click on the report to open it.
3. Click Grouping:
   a. Select the field you want to group by.
   b. Click Add subgroup to further group your data, if needed.
   c. Click Apply.
4. Click Functions:
   a. Select the field you want to aggregate.
   b. Select the function to perform on the field (note that the options that appear will vary based on the field you selected).
   c. Click Add New to add more functions, if needed.
   d. Click Apply.
5. Click Sorting:
   a. Select the field you want to sort by and if you want to sort in ascending or descending order.
   b. Click Add New to add additional sort levels, if needed.
   c. Click Apply.
Creating a Simple Chart from Your Report Data

You must have ADP Analytics to be able to create a chart from your report data. If you don’t have ADP Analytics but would like to find out more about it, contact your ADP sales representative.

**Note:** If you are already viewing your report output, go directly to step 3.

1. Select **Reports > View > Reports Output**.
2. Locate and click on the report to open it.
3. Click **Analyze Data**.
4. Select your options from the **Analyze**, **As**, and **View By** menu lists.
5. Select the chart type.
6. Click **View Chart**.