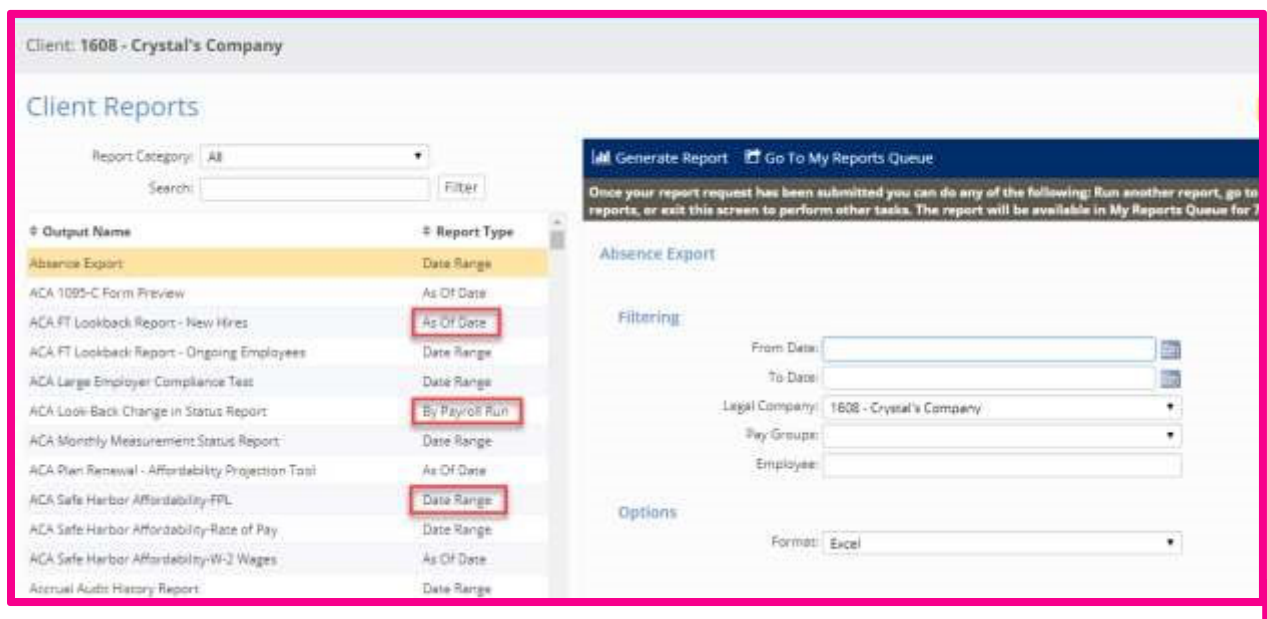


Overview

This article reviews the process for running Client Reports in iSolved.

Process

Navigate to Reporting > Client Reports. From here, iSolved generates all reports that you have been granted access to view. The reports you have access to may be different from the reports a co-worker may see, or even the reports someone from a different company that uses iSolved might see. The reports each individual person sees is dependent upon the access granted to them by their company.



The reports available to you are listed in alphabetical order by name, and also have their report type indicated. There are three different Report Types:

1. **Date Range:** Used to enter a “from” and a “to” date. All payroll runs within the date range are displayed on the report.
2. **As Of Date:** Used to run a report based on the date entered.
3. **By Payroll Run:** Used to run a report based on the data from a payroll run, or since the last payroll run.

Notes:

- Not all reports are built in all report types.
- Not all reports are available in all formats. Make sure you choose the correct format.

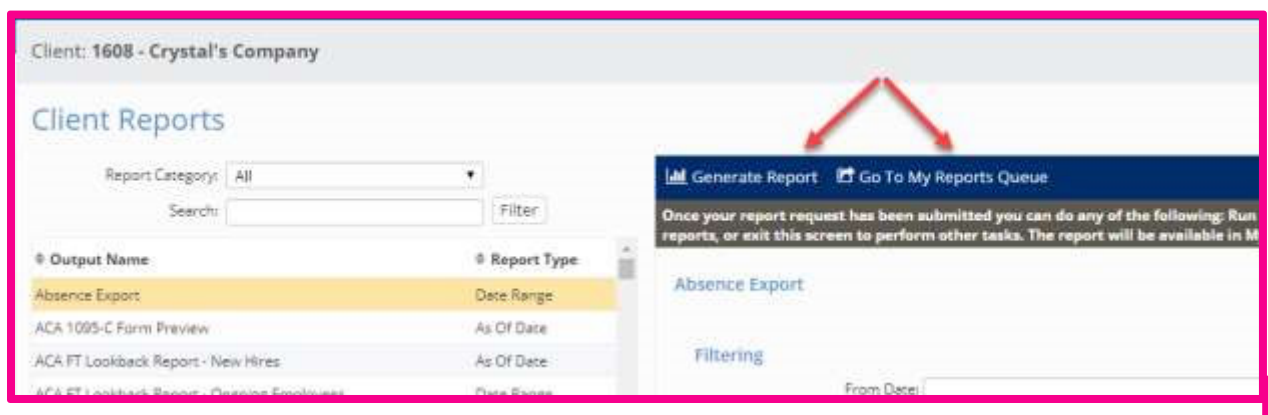
Most likely, your list of reports will be very long. At the top of the list are two fields to help you sort and focus the list and to narrow your search. Don't forget to click on the **Filter** button after entering information into one of these fields to get started.

- **Report Category:** This is a drop-down field that gives you general topics. Choose one of these general topics and the list will shorten to provide you with only the reports for that subject. Not finding the report you want? Choose another topic and click on **Filter** again. The list changes automatically.
- **Search:** This field allows you type in the name (partial or whole) of the report and click on **Filter**. For example. If I was looking for the “Employee Profile with Check Accumulations” report. I could type, “employee pro” and click **Filter**, and four different reports would be brought up to choose from.

Or, I could type in the word “hours” into the search bar and it would bring up all of the reports with the word “Hours” in the name of the report.

If I wanted to return to see all the reports again, I would simply remove any characters from the search bar, return the **Report Category** to “All” and click on **Filter**.

Once I choose the report I want, it's time to pick the report filters, sorting and options. Not all reports have the same filtering sorting and options available. Choose from available options. Many times, the options will be determined by your organization setup (i.e. Department, Division, Location, etc.).



When you have chosen your filters, sorting, and options, return to the blue action bar and click on **Generate Report**. This starts the report generating. Then, click on “Go To My Reports Queue” to see the progress of your report.

The screenshot displays a web interface titled "My Reports Queue". At the top right, there is a "Logout" button. Below the title is a table with the following columns: Client ID, Report Name, Status, Report Requested, Generate Begin, Generate End, Purge Date, and View Report. A single row is visible with the following data: Client ID 5608, Report Name ACA 1095-C Form Preview, Status GENERATED, Report Requested 12/9/2019 12:00:28 AM, Generate Begin 12/9/2019 12:00:37 AM, Generate End 12/9/2019 12:00:45 AM, Purge Date 12/13/2019 12:00:45 AM, and a "View Report" link. Below the table is a dark blue bar containing "Delete" and "Refresh" buttons. Underneath this bar is a section titled "Report Parameters" with the following details: Report Name: ACA 1095-C Form Preview, Report Type: As Of Date, Year: 2014, Legal Company: Crystal's Company, Organization Level: None, Work Locations: BATAVIA TOWNSHIP, MI, and Format: PDF. Red arrows point to the "View Report" link in the table and the "Refresh" button in the bar.

Client ID	Report Name	Status	Report Requested	Generate Begin	Generate End	Purge Date	View Report
5608	ACA 1095-C Form Preview	GENERATED	12/9/2019 12:00:28 AM	12/9/2019 12:00:37 AM	12/9/2019 12:00:45 AM	12/13/2019 12:00:45 AM	View Report

Report Parameters

Report Name: ACA 1095-C Form Preview
Report Type: As Of Date
Year: 2014
Legal Company: Crystal's Company
Organization Level: None
Work Locations: BATAVIA TOWNSHIP, MI
Format: PDF

Click the **Refresh** button as often as you would like to check on your report. Your report will display the words "View Report" in the column **View Report** when ready. Click on this link to view your report.