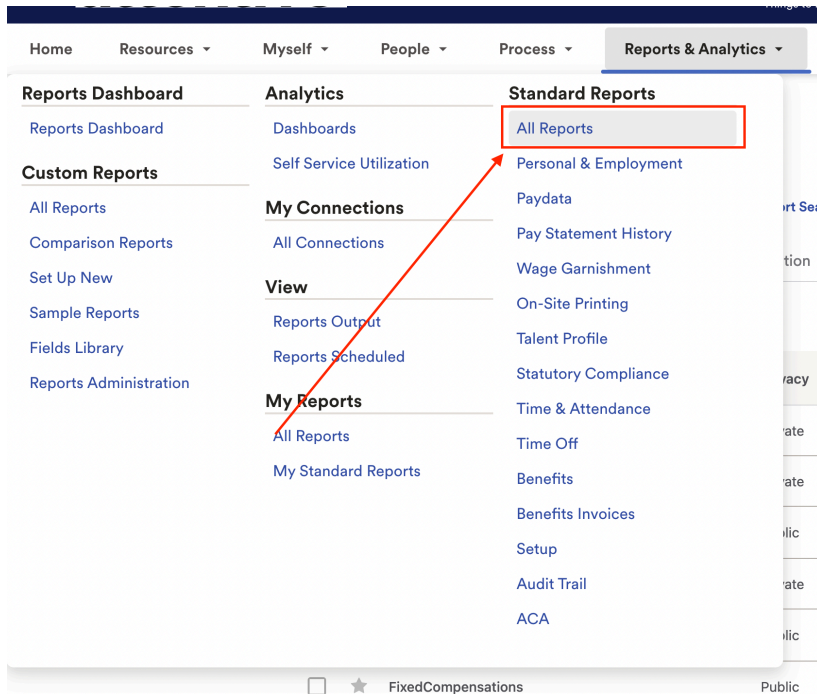


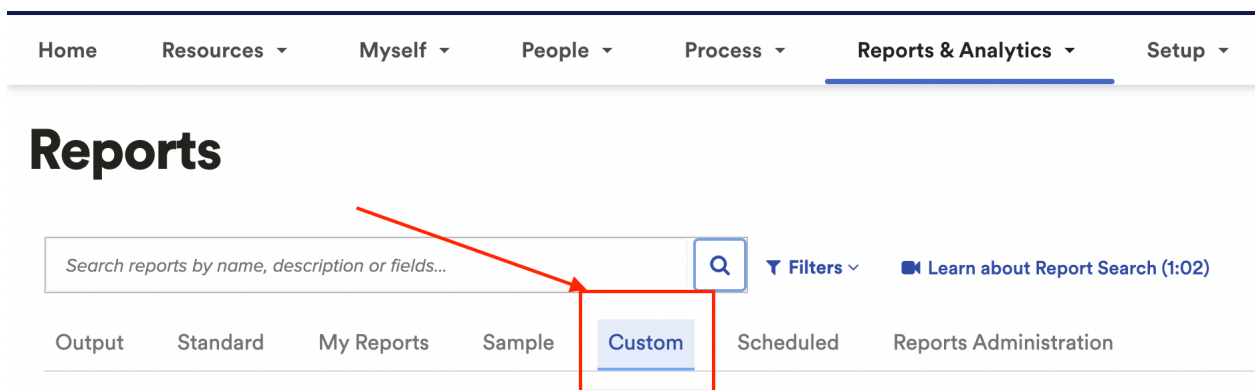
ADP Custom Report Setup

If you have already provided GUI access to Knoetic, we can set this up for you. If you have not provided GUI access, you will need to complete the following steps:

1. Login to your ADP instance and navigate to the [Reports page](#)



2. Select the "Custom" tab



3. Create the "Knoetic" folder

- a. Click "Manage Folders"

The screenshot shows the 'Reports & Analytics' dashboard. The 'Custom' tab is selected. In the left sidebar, the 'Manage Folders' button is highlighted with a red box. A red arrow points from this button to the 'All Reports' folder in the main content area.

Home Resources ▾ Myself ▾ People ▾ Process ▾ Reports & Analytics ▾

Reports

Search reports by name, description or fields... [Filters ▾](#) [Learn about Report See](#)

Output Standard My Reports Sample Custom Scheduled Reports Administration

CUSTOM REPORTS

All Reports 27	★ Name / Title	P
Unfiled Reports 19		
Twine 8	<input type="checkbox"/> ★ Pay Profile	P
Manage Folders	<input type="checkbox"/> ★ Employment Profile	P

- b. Click "New Folder"
- c. Type in "Knoetic"
- d. Click "Ok"

The screenshot shows the 'Manage Folders' dialog box. The 'New Folder' button is highlighted with a red box. The 'Knoetic' folder name is entered in the 'FOLDER NAME' input field, which is also highlighted with a red box. The 'OK' button is highlighted with a red box at the bottom right.

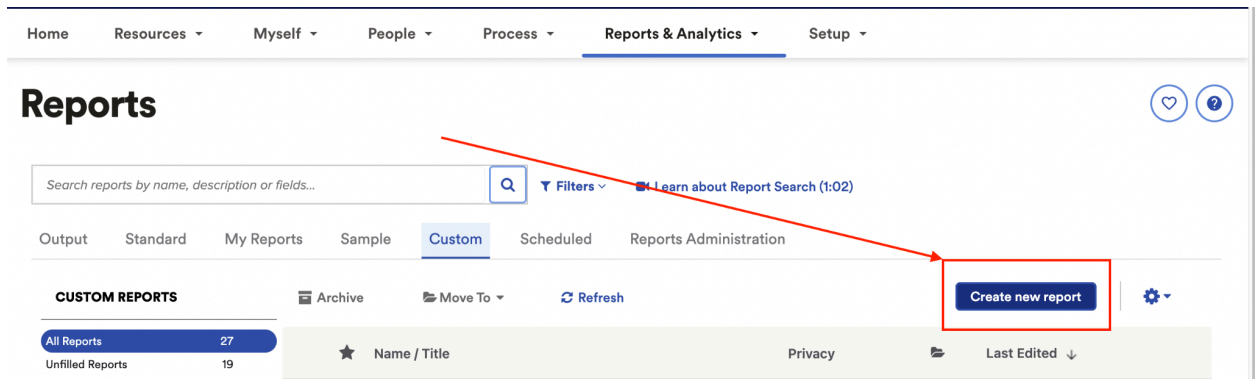
Reports

Manage Folders

Manage folders for your reports.

FOLDER NAME	OWNER	DEFAULT	ACTIONS
Knoetic	Me		...
Twine	Me		...

4. With the folder created. We are now ready to start creating our reports.



5. Create the "Personal Profile" Report

a. Name your Report

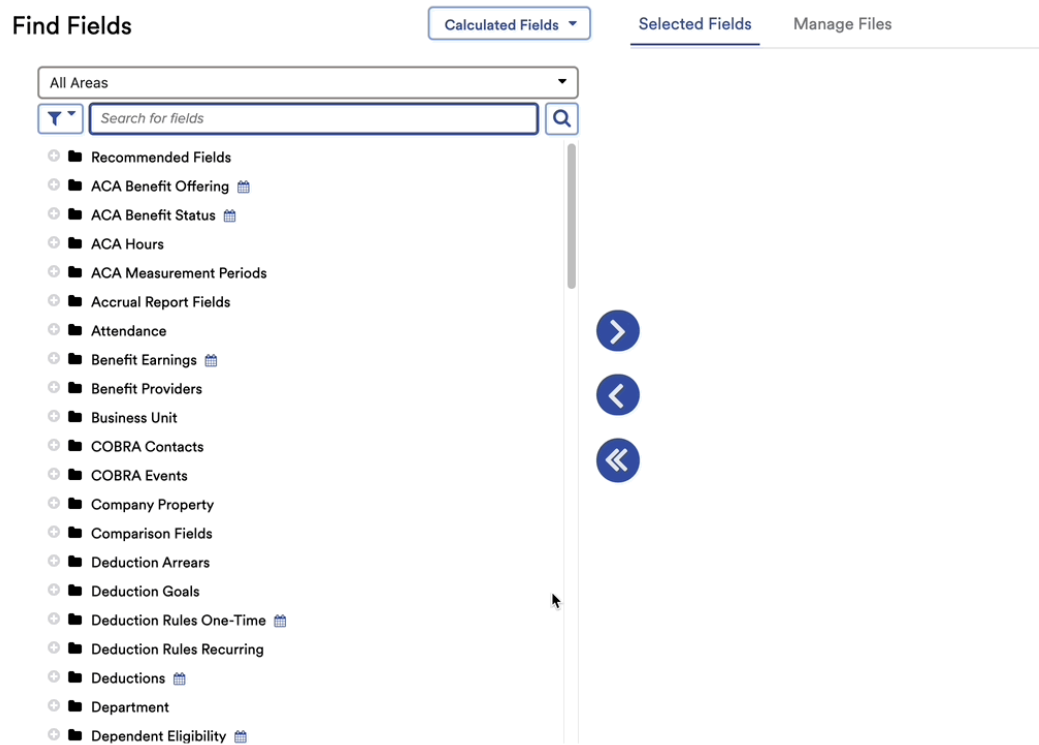
- Report Title → "Personal Profile"
- Folder → "Knoetic"
- Description → {optional}
- Advanced Options > "Advanced columnar"

The screenshot shows the 'Set Up New Report' form. It has fields for Report Title, Folder, and Description (optional). The Report Title field contains 'Personal Profile' and has a dropdown menu open showing 'Advanced columnar' selected. The Folder field contains 'Twine'. The Description field is empty. Below the Description field, there's a dropdown menu for 'Advanced Options' with a red box around it and a red arrow pointing to it. The dropdown menu shows options: 'Advanced columnar' (selected), 'Form', 'Data extract', 'Mailing labels', and 'Comparison report'. At the bottom of the form, there are buttons for '< Cancel', 'Advanced Options', and 'Select Fields'.

b. Select Fields

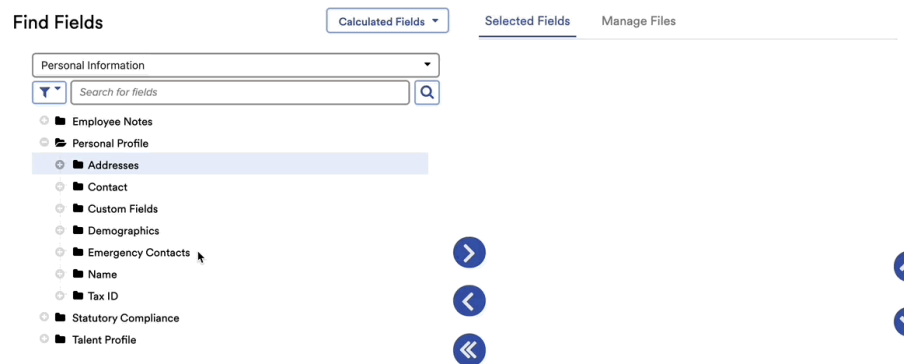
- Add "Associate ID" this is used as a unique identifier to match personal information data to an Employee
 - Click the "Search for fields" search bar
 - Search for "associate"
 - Select "Employment > Associate ID"

4. Select the Field, click the "(>)" icon



- ii. Now to add personal information data. Search in "All areas" for "Personal Profile"
- iii. Expand the "Personal Profile" folder
 - 1. [Tip] to quick select:
 - a. Select the first field of the folder by left clicking on it
 - b. Scroll down to the last field
 - c. Hold "Shift + Click" on the last field of the folder

d. All fields will be selected



2. Select fields from the following "Personal Profile" sub folders:

- a. "Addresses"
- b. "Contact"
- c. "Name"
- d. "Demographic"
- e. Any other fields you want displayed in Knoetic in the "Personal Profile" folder

iv. Click "Save and Next"

c. Select Sort Order → Skip (click "Save and Next")

d. Specify Totals → Skip (click "Save and Next")

e. Select Format → Skip (click "Save and Next")

i. The default settings is what we need:

1. Page Layout → Portrait

2. Report Format

- a. [Checked] ☒ Company Logo
- b. [Checked] ☒ Report Title
- c. [Checked] ☒ Report Date and Page
- d. [Checked] ☒ Report Generation Time
- e. [Checked] ☒ Powered by ADP

f. Add Filters → Skip (click "Save and Next")

g. Run a Report

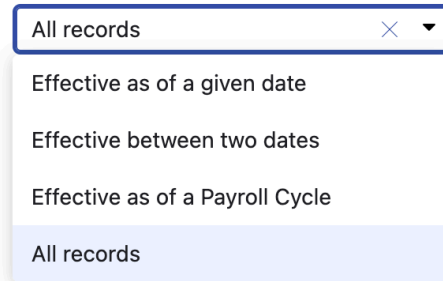
i. Runtime Settings

1. [Important] Select "All records"

Runtime Settings

☐ Print settings on report

Employment Profile *

A screenshot of a dropdown menu for 'Employment Profile'. The menu is open, showing four options: 'All records', 'Effective as of a given date', 'Effective between two dates', and 'Effective as of a Payroll Cycle'. The 'All records' option is highlighted at the bottom. The dropdown has a blue border and a close button (X) in the top right corner.


All records

Effective as of a given date

Effective between two dates

Effective as of a Payroll Cycle

All records

- ii. Output Settings
 - 1. Default Format → CSV
 - 2. Output Folder → Knoetic
 - 3. Maximum # of Records → 40000
 - 4. Return unique records only → ☒ Checked
- iii. Notification - No action needed
- iv. Schedule - Set "Schedule and Distribution"
 - 1. Repeats → Daily
 - 2. At →
 - a. 07:00 AM
 - b. 03:00 PM
 - c. 11:00 PM
 - 3. Starting → {date_today}
 - 4. Ending → Never
 - 5. Notification - No action needed
 - 6. Automatic Report Distribution → ☒ Checked
 - 7. File Name → "personal_profile"
 - 8. Output Format → CSV
 - 9.  Destination → "Knoetic SFTP" (*Pending SFTP Setup with ADP SOW*)

Schedule and Distribution - Personal Profile

After you select the execution frequency details for your report, click Continue to go to the next page to select additional settings for runtime, notification and automatic report distribution as applicable.

Schedule Active Delete

Daily at 07:00 AM and 03:00 PM

Repeats
Daily

☐ Exclude Weekends

At
07:00 AM 03:00 PM 11:00 PM

[Add another scheduled run time](#)

Starting
04/25/2023

Ending
☒ Never
☐ After time(s)
☐ At MM/DD/YYYY

Notification
☐ Notify me when the report is ready to be viewed

Automatic Report Distribution
☒ Enable Automatic Report Distribution

File Name
personal_profile

Output Format
CSV

Destination
Select a destination

< Cancel CONTINUE

a.

6. Create the "Employment Profile" Report. Repeat Step 5 (Personal Profile Report) with some changes:

a. **Report Title** → "Employment Profile"

b. **Select Fields** →

- Add "Associate ID" this is used as a unique identifier to match personal information data to an Employee
- Now to add Employment data. Search in "All areas" for "Employment"
- Expand the "Employment Profile" folder

Find Fields

Calculated Fields

Employment

Search for fields

- Company Property
- Employment Profile**
 - Allocations
 - Corporate Groups
 - Custom Fields
 - Employment
 - Position
 - Status
 - Time Off
 - Work Schedule
- Employment Profile - Pay Rates
- Employment Profile - Time & Attendance

- iv. Select fields from the following "Employment Profile" sub folders:
 1. Corporate Groups
 2. Employment
 3. Position
 4. Status
 5. Any other fields you want displayed in Knoetic
- c. **Run a Report** →
 - i. Schedule - Set "Schedule and Distribution"
 1. File Name → "employment_profile"
- 7. Create the "Pay Profile" Report. Repeat Step 5 (Personal Profile Report) with some changes:
 - a. **Report Title** → "Pay Profile"
 - b. **Select Fields** →
 - i. Add "Associate ID" this is used as a unique identifier to match personal information data to an Employee
 - ii. Now to add Compensation data. Search in "All areas" for "Employment"
 - iii. Expand the "Employment Profile - Pay Rates" folder

Find Fields

Calculated Fields ▾

Employment
▾

▾

Search for fields

Q

+ Company Property

+ Employment Profile

- Employment Profile - Pay Rates

+ Additional Earnings

+ Additional Hourly Rates

+ Pay Grade Details

+ Regular Pay

+ Variable Pay Tracking

+ Employment Profile - Time & Attendance

Company Property

Employment Profile

Employment Profile - Pay Rates

Additional Earnings

Additional Hourly Rates

Pay Grade Details

Regular Pay

Variable Pay Tracking

Employment Profile - Time & Attendance

- iv. Select fields from the following "Employment Profile - Pay Rates" sub folders:
 1. Regular Pay
 2. Variable Pay Tracking
- c. **Run a Report** →
 - i. Schedule - Set "Schedule and Distribution"
 1. File Name → "pay_rate"