

How To Generate Reports in Payworks

1. Enter the email address and password you set up when creating your account, then select **“log in”**. If you can’t remember these details, select **“forgot your password?”** below the password entry box and follow the prompts to recover your details.
(Hint: You can check the **“remember email”** box above the **“log in”** button to save your login details.)
2. If you are an administrator for multiple companies in Payworks, select **“admin”** to the right of the company you are downloading payroll reports for. **If you are only an administrator for one company, proceed to step three.**
3. Select **“reports”** from the menu on the left side of the page to open the dropdown menu showing all available reports.
4. Under the sub-category **“report builder”**, select **“report viewer”**.
5. Select the down arrow to the right of the **“select a report”** box to open the report dropdown menu.
6. Using the scroll wheel of your mouse, the menu scroll bar, or the menu arrows located on the right side of the dropdown menu, locate the report you wish to open. Once you have located the report, select it from the list to go to the report viewer page for that report.
7. Select **“generate reports”**. Your report will now be open.
(Hint: scroll to the bottom of the page and select **“export”** to download a comma-separated values (CSV) version of the report, which you can open in Microsoft Excel.)