

## Best Practices for Building Reports

1. **Start with a custom report.** Most payroll, HRIS, and ben-admin systems allow you to create custom reports. Use this feature to ensure the data fields align with the Flimp TRS census layout. This reduces the need for manual adjustments later.
2. **Include the required fields.** Ensure your report contains:
  - Employee first name and last name
  - Email address
  - Annualized salary
  - Up to 25 benefit types
  - Up to 4 compensation types
3. **Use the correct order.** Structure the report so that fields match the order in the census template. This makes it easy to copy and paste the data without errors.
4. **Check your data.** Review the report for accuracy, formatting consistency, and completeness before exporting.
5. **Export the report** in CSV or Excel format.

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## Platform-Specific Instructions

If you have questions or need assistance creating a custom report, contact your HRIS provider's support team or refer to their online resources.

### ADP Workforce Now

1. Navigate to "Reports."
2. Select "Create Custom Report" and choose "Employee Data" or "Payroll Data" as the base.
3. Add all required fields in the correct order. Use the Flimp TRS census layout as a guide.
4. Click "Export" and choose CSV or Excel.

### Workday

1. Go to the "Reporting and Analytics" section.
2. Click "Create Report" and select "All Workers" or a similar dataset.
3. Add fields to match the Flimp TRS census template. Use filters to include only relevant employee groups.
4. Run the report, then select "Export" to download it in CSV or Excel format.

### UKG (Ultimate Kronos Group, formerly UltiPro)

1. Navigate to the "Reporting" section.
2. Click "Build a New Report" and select relevant employee and payroll data.
3. Align the columns to match the Flimp TRS census layout for easy transfer.
4. Export the data in CSV or Excel format.

### PaychexFlex

1. Go to the "Reports" menu.
2. Select "Employee Information" or "Payroll Reports."

3. Customize the fields to align with the Flimp TRS census requirements.
4. Export the report as a CSV or Excel file.

#### Gusto

1. Open the "Reports" section.
2. Select "Employee Details" or "Payroll History."
3. Add the required fields in the proper order. Refer to the Flimp TRS census as a guide.
4. Export the report in Excel format.

#### Ceridian Dayforce

1. Click on "Reports" in the dashboard.
2. Select "Employee Data" or "Payroll Summary."
3. Add the required fields in the proper order. Refer to the Flimp TRS census as a guide.
4. Export the report in Excel format.

#### SAP SuccessFactors

1. Access "Analytics" and navigate to the "Reporting" section.
2. Use the custom-report builder to select your dataset.
3. Add columns including employee information, compensation, and benefits data.
4. Export the report as a CSV or Excel file.

#### Oracle HCM Cloud

1. Navigate to "Tools" and go to "Reports and Analytics."
2. Select "Create Analysis" and choose the relevant dataset.
3. Add fields that align with the Flimp TRS census.
4. Save the report as a CSV or Excel file.

#### Kronos Workforce Central

1. Navigate to the "Reports" section.
2. Select "Employee Information" or "Payroll."
3. Add fields and structure the report based on the census. Refer to the Flimp TRS census as a guide.
4. Save the report in Excel format.

#### Namely

1. Click "Reports" on the main menu.
2. Create a new custom report with the required fields.
3. Ensure the layout matches the Flimp census template.
4. Generate and download the report in CSV or Excel format.

#### Zenefits

1. Open the "Reports" dashboard.
2. Select "Employee Details" or "Payroll History."
3. Add and arrange fields as required. Refer to the Flimp TRS census as a guide.
4. Export the report in CSV or Excel format.

#### Rippling

1. Navigate to the "Reports" section.
2. Select "Create Report" and add the required fields.
3. Ensure the columns match the Flimp TRS census.
4. Export the report in CSV or Excel format.

### Paylocity

1. Open the "Reports" menu.
2. Select relevant fields and structure them to align with the Flimp census template.
3. Export the report as a CSV file.

### TriNet

1. Open the "Reports" section on the dashboard.
2. Select "Employee Data" or "Payroll Summary."
3. Arrange fields to align with the Flimp census template.
4. Generate and save the report in CSV or Excel format.

### APS (Automatic Payroll Systems)

1. Navigate to the "Reporting" console from the main dashboard.
2. Click on "Report Manager" to view the available reports.
3. Choose the appropriate report:
  - For payroll data, select reports like "Payroll Register" or "Payroll Summary."
  - For benefits data, choose "Benefits Enrollment" or "Benefits Deductions."
4. Define the necessary filters, set the date range, and arrange fields to align with the Flimp census template.
5. Run and export the report in CSV or Excel format.

## Securing and Transferring Data

Once you've exported the data, it's essential to handle it securely to protect sensitive employee information.

- Save the file temporarily in a secure, password-protected location on your system.
- Transfer the file via a secure Dropbox folder:
  1. Open the Dropbox folder provided by our team.
  2. Drag and drop the files into the shared folder.
  3. Confirm the upload and notify your project manager that the files are ready for processing.
- Avoid using email for file transfers unless encrypted, as it poses security risks.
- If you're unable to access Dropbox, contact us.