

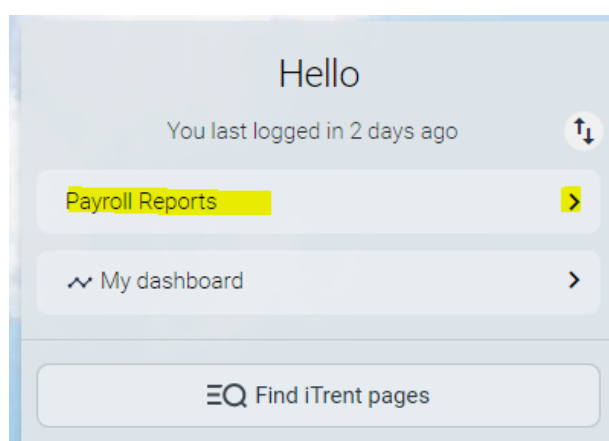
Running a Payroll Report – Elements by Employees

The 'Elements by Employees' report in iTrent details one or multiple pay elements calculated for a specific month for the staff at your school. It is possible to select which or all elements that should display in the report.

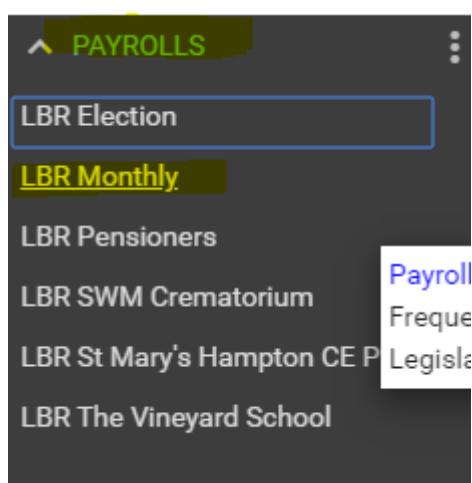
1. Log into your Payroll Reporting access profile. Once you have clicked on login you will be asked to select a role; this will be 'SCH – YOUR SCHOOL NAME PAYROLL REPORT.'

Note: If you are already logged into iTrent, switch roles by clicking on the Face icon in the top right-hand corner.

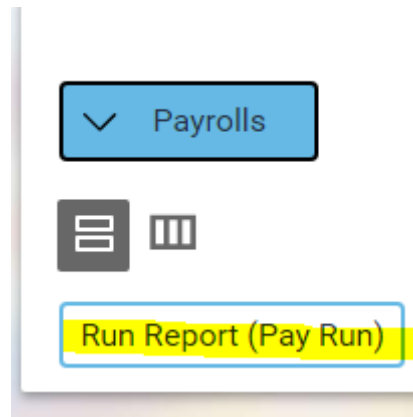
2. Click on the link to 'Payroll Reports':



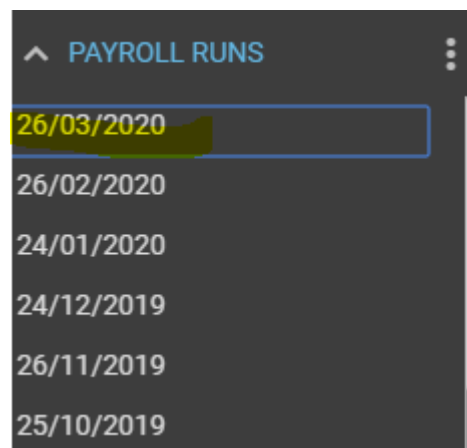
3. Select the relevant Payroll that you want to run the report on under 'Payrolls' on the left-hand side:



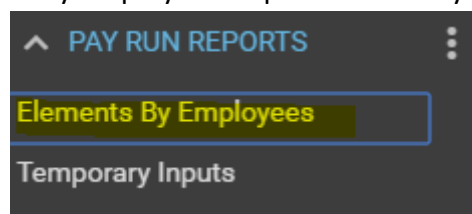
4. Next, click on 'Run Report (Pay Run)':



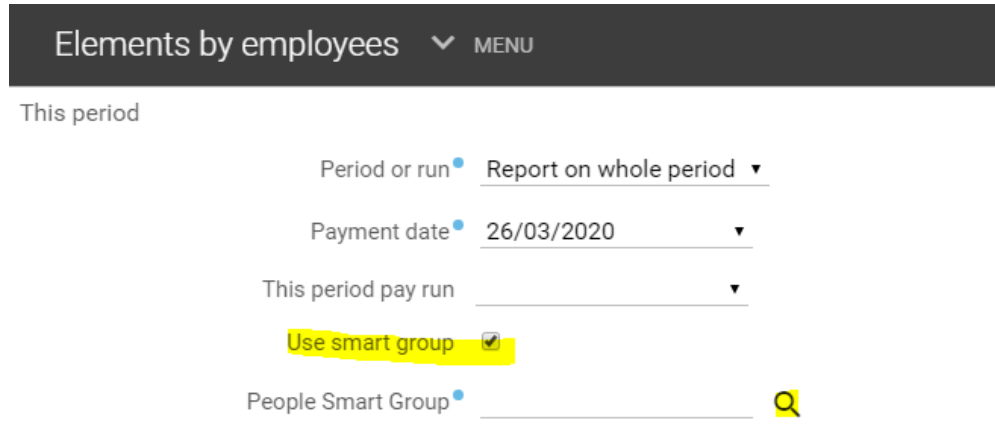
5. On the left-hand side, select the relevant payment date that you want to run the report for, under 'Payroll Runs':



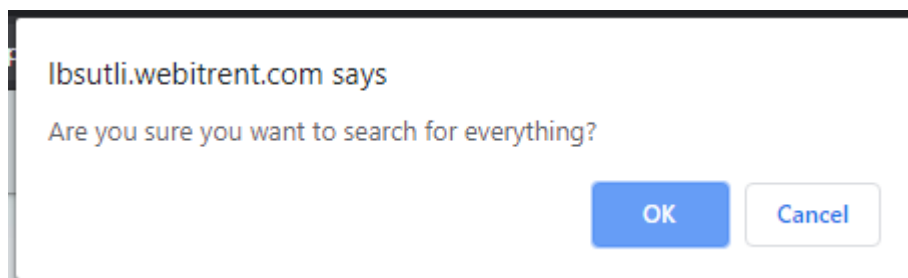
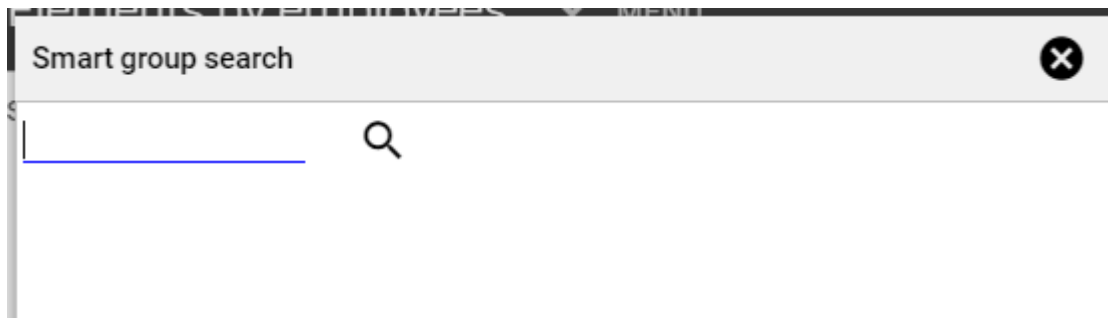
6. Next, select the 'Elements by Employees' report under 'Pay Run Reports':



7. The following screen will display. Tick the box next to 'Use Smart Group':



8. The 'People Smart Group' field will appear. Click on the magnifying glass next to this field.
9. Do a blank search to search for everything, when prompted if you want to search for everything, click **OK**:



10. Now select the school smart group from the search results by clicking on it:

Smart group search
(Person search)

Results 1 Record

Smart group name	Access	Type	C
R SCH - The Russell Primary	Public	Dynamic	.

11. Your school name will then appear in 'People Smart Group' field.

12. Under 'Selected Elements for Report,' use the arrows to move the elements of interest from the list of "Available" pay elements on the left to the list of "Selected" pay elements on the right. The top double arrow >> icon will move all of the elements from available to selected. Alternatively, select the elements of choice and use the single arrow icon > beneath to select specific elements. To remove an element from the selected list in the left, click the element in the right-hand list and use the back arrow icon < to move the element out of selected.

Selected elements for report

Available:

AEO Admin Fee
Community Charge AEO
Council Tax AEO
DEA Table
DEO (3/3/03 Onwards)



Selected:

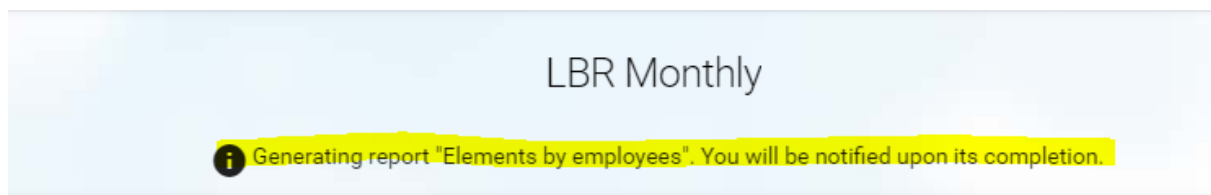
13. Change the Output type to CSV File and then click on the 'Run' button:

Output type **CSV File** ▼

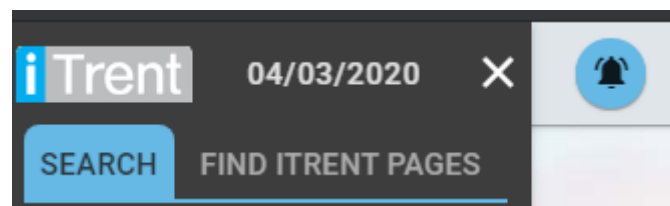
Report run comments

RUN

14. A message will display at the top of the screen which confirms that the report is being generated and that you will be notified upon its completion. When it has completed you will receive an email and notification from iTrent.



Note: If you're in iTrent, this bell icon will display in the top left-hand corner when the report is finished running:

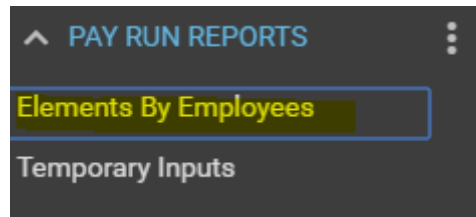


Downloading the Report– Elements by Employees

1. To download the report, click on the 'Payroll Reports' in the menu on the home page, click on 'Payrolls' and click on 'Download Output':



2. Re-select the relevant pay period date under 'Payroll Runs' on the left-hand side and then select the 'Elements by Employees' report; next click on 'Download Output':




3. The Download output screen will display, including the date and time that the report was run. Click on the downward arrow icon under 'Download' to download the report. Once downloaded, click on the report to view the content (by default it will open in Excel if the output selected was .csv).

Download output Elements By Employees
MENU

View output from
Today

Available report outputs

Run date & time	Comments	Download	Delete Select all
02/03/2020 14:17			<input type="checkbox"/>

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	A	B	C	D	
1	Trent				
2	Richmond Org				
3	Elements By Employees				
4	Run By:	JUDYFTEST7			
5	Run Date:	02/03/2020			
6	Run Time:	14:17:16			
7	Payroll:	LBR Monthly			
8	This Period:	12-2019/2020 (26/03/2020)			
9	Workgroup:	R SCH - The Russell Primary			
10	Elements:	<User Selected Elements>			
11	-----				
12	Employee Name	Payroll Number	Element Type	Element Code	Element name
13	****				

Note: To access previous reports that were run on earlier dates, use the drop down option “View output from” at the top of the display pane.

Note: The status of the report will show from your homepage in your ‘To Do List/Processes’ under ‘Processes’. Clicking on the arrow next to the report in this screen which will take you to the ‘Download Output’ Screen where you can download the report.

TO DO LIST (0)	<u>PROCESSES (0)</u>	
Report - Elements By Employees, Richmond Org		
COMPLETE 02/03/2020 14:17		