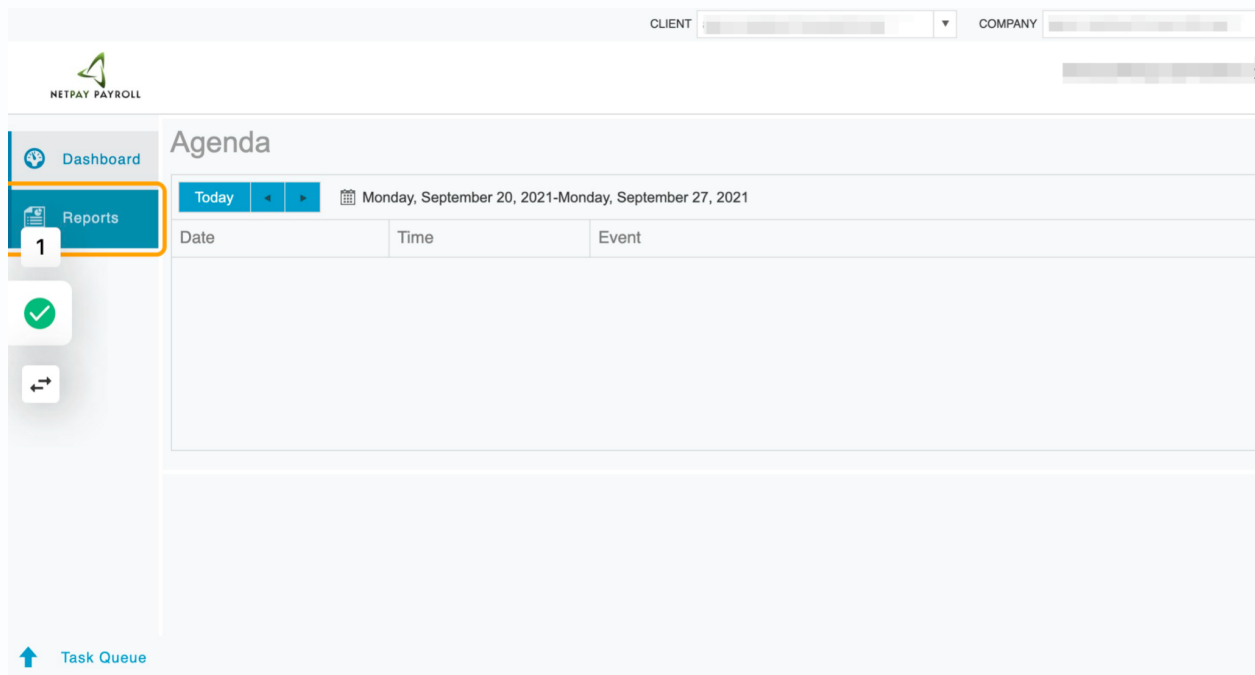


Evolution Historical Data Extraction

1 Log into your Evolution Payroll account.

The screenshot shows the Evolution Payroll interface. At the top right, there are fields for 'CLIENT' and 'COMPANY'. The 'NETPAY PAYROLL' logo is visible in the top left. A sidebar on the left contains navigation options: 'Dashboard', 'Reports' (with a '1' notification), and 'Task Queue'. The main area is titled 'Agenda' and shows a date range of 'Monday, September 20, 2021-Monday, September 27, 2021'. Below this is a table with columns for 'Date', 'Time', and 'Event', which is currently empty.

2 Click on Reports.



The screenshot shows the NetPay Payroll interface. At the top, there are fields for CLIENT and COMPANY. Below this is the NETPAY PAYROLL logo. On the left side, there is a navigation menu with items: Dashboard, Reports (highlighted with an orange box and a '1' in a white circle), a green checkmark icon, a refresh icon, and a Task Queue link at the bottom. The main content area is titled 'Agenda' and shows a date range from Monday, September 20, 2021 to Monday, September 27, 2021. Below the date range is a table with columns for Date, Time, and Event, which is currently empty.

3 Click on Payroll Register.

CLIENT [] COMPANY []

NETPAY PAYROLL

Dashboard

Reports

2

DEFINED REPORTS

PUBLISHED REPORTS

AD HOC REPORTS

Search For Report... EXPORT LIST TO EXCEL

Report Name	Report #
Payroll Register (S109)	109
W-2 1099 Edit (S162)	162
Earnings And Deductions (S181)	181
Delivery Label (S184)	184
Delivery Instructions (S187)	187
Cover Letter (S193)	193
Direct Deposit (S211)	211
Workers Compensation (S217)	217
Tax Report For Payroll (S247)	247
Tax Report For Payroll TAX DEPT (S247)	247
Employee Profiles (S263)	263
Input Worksheet (S351)	351
Input Wksht Cover Letter (S360)	360

Payroll Register

Choose options for this report

CONFIGURE REPORT →

Task Queue

4 Click on Configure Report

CLIENT [REDACTED] COMPANY [REDACTED]

NETPAY PAYROLL

Dashboard

Reports

3

Task Queue

DEFINED REPORTS

PUBLISHED REPORTS

AD HOC REPORTS

Search For Report... EXPORT LIST TO EXCEL

Report Name	Report #
Payroll Register (S109)	109
W-2 1099 Edit (S162)	162
Earnings And Deductions (S181)	181
Delivery Label (S184)	184
Delivery Instructions (S187)	187
Cover Letter (S193)	193
Direct Deposit (S211)	211
Workers Compensation (S217)	217
Tax Report For Payroll (S247)	247
Tax Report For Payroll TAX DEPT (S247)	247
Employee Profiles (S263)	263
Input Worksheet (S351)	351
Input Wksht Cover Letter (S360)	360

Payroll Register

Choose options for this report

CONFIGURE REPORT →

5 Enter in the start and end data of the closed quarter you are pulling reports for. EX: 1/1/2021 - 3/31/2021.

Dashboard Reports

DEFINED REPORTS ← REPORTS LIST Options for Payroll Register

PUBLISHED REPORTS

AD HOC REPORTS

Payroll Filter EE Filter Org Filter Misc Options Run Report

Select the date range to use for your report. All payrolls within your range will be selected. You can fine tune your selection by checking only the payrolls you want to include.

Starting Date 01/01/2021 Ending Date 03/31/2021 Include All Payrolls APPLY

<input type="checkbox"/>	Check Date	Run #	Processed Date	Status	Type
<input type="checkbox"/>	09/17/2021	1	09/13/2021 04:03:00 PM	Processed	Regular
<input type="checkbox"/>	09/10/2021	1	09/07/2021 11:19:13 AM	Processed	Regular
<input type="checkbox"/>	09/03/2021	1	08/30/2021 03:03:03 PM	Processed	Regular
<input type="checkbox"/>	08/27/2021	1	08/23/2021 01:48:36 PM	Processed	Regular
<input type="checkbox"/>	08/20/2021	1	08/16/2021 02:24:57 PM	Processed	Regular
<input type="checkbox"/>	08/13/2021	1	08/09/2021 11:44:40 AM	Processed	Regular
<input type="checkbox"/>	08/06/2021	1	08/02/2021 03:46:49 PM	Processed	Regular
<input type="checkbox"/>	07/30/2021	1	07/26/2021 02:08:39 PM	Processed	Regular
<input type="checkbox"/>	07/23/2021	1	07/19/2021 03:16:25 PM	Processed	Regular
<input type="checkbox"/>	07/16/2021	1	07/12/2021 02:58:46 PM	Processed	Regular

Task Queue

6 Click "APPLY" once you have entered in the date range.

Dashboard Reports

DEFINED REPORTS ← REPORTS LIST Options for Payroll Register

PUBLISHED REPORTS

AD HOC REPORTS

Payroll Filter EE Filter Org Filter Misc Options Run Report

Select the date range to use for your report. All payrolls within your range will be selected. You can fine tune your selection by checking only the payrolls you want to include.

Starting Date 01/01/2021 Ending Date 03/31/2021 Include All Payrolls APPLY

<input type="checkbox"/>	Check Date	Run #	Processed Date	Status	Type
<input type="checkbox"/>	09/17/2021	1	09/13/2021 04:03:00 PM	Processed	Regular
<input type="checkbox"/>	09/10/2021	1	09/07/2021 11:19:13 AM	Processed	Regular
<input type="checkbox"/>	09/03/2021	1	08/30/2021 03:03:03 PM	Processed	Regular
<input type="checkbox"/>	08/27/2021	1	08/23/2021 01:48:36 PM	Processed	Regular
<input type="checkbox"/>	08/20/2021	1	08/16/2021 02:24:57 PM	Processed	Regular
<input type="checkbox"/>	08/13/2021	1	08/09/2021 11:44:40 AM	Processed	Regular
<input type="checkbox"/>	08/06/2021	1	08/02/2021 03:46:49 PM	Processed	Regular
<input type="checkbox"/>	07/30/2021	1	07/26/2021 02:08:39 PM	Processed	Regular
<input type="checkbox"/>	07/23/2021	1	07/19/2021 03:16:25 PM	Processed	Regular
<input type="checkbox"/>	07/16/2021	1	07/12/2021 02:58:46 PM	Processed	Regular

Task Queue

7 Select all the reports within the specified date range.

Dashboard Reports

DEFINED REPORTS ← REPORTS LIST Options for Payroll Register

PUBLISHED REPORTS

AD HOC REPORTS

Payroll Filter EE Filter Org Filter Misc Options Run Report

Select the date range to use for your report. All payrolls within your range will be selected. You can fine tune your selection by checking only the payrolls you want to include.

Starting Date 01/01/2021 Ending Date 03/31/2021 Include All Payrolls APPLY

<input checked="" type="checkbox"/>	Check Date	Run #	Processed Date	Status	Type
<input checked="" type="checkbox"/>	03/31/2021	1	03/25/2021 01:24:51 AM	Processed	Tax Adjustment
<input checked="" type="checkbox"/>	03/26/2021	1	03/22/2021 10:01:08 AM	Processed	Regular
<input checked="" type="checkbox"/>	03/19/2021	1	03/15/2021 03:24:13 PM	Processed	Regular
<input checked="" type="checkbox"/>	03/12/2021	1	03/09/2021 12:48:43 PM	Processed	Regular
<input checked="" type="checkbox"/>	03/05/2021	1	03/01/2021 09:24:40 AM	Processed	Regular
<input checked="" type="checkbox"/>	02/26/2021	1	02/22/2021 01:30:10 PM	Processed	Regular
<input checked="" type="checkbox"/>	02/19/2021	1	02/15/2021 11:02:23 AM	Processed	Regular
<input checked="" type="checkbox"/>	02/12/2021	1	02/08/2021 12:37:52 PM	Processed	Regular
<input checked="" type="checkbox"/>	02/05/2021	1	02/01/2021 10:56:18 AM	Processed	Regular
<input checked="" type="checkbox"/>	01/29/2021	1	01/25/2021 10:54:56 AM	Processed	Regular

Task Queue

Page 1 of 2 1 - 10 of 13 items

8 Next, click on EE Filter.

Options for Payroll Register

DEFINED REPORTS
PUBLISHED REPORTS
AD HOC REPORTS

Payroll Filter EE Filter Org Filter Misc Options Run Report

Select the date range to use for your report. All payrolls within your range will be selected. You can fine tune your selection by checking only the payrolls you want to include.

Starting Date 01/01/2021 Ending Date 03/31/2021 Include All Payrolls APPLY

✓	Check Date	Run #	Processed Date	Status	Type
✓	03/31/2021	1	03/25/2021 01:24:51 AM	Processed	Tax Adjustment
✓	03/26/2021	1	03/22/2021 10:01:08 AM	Processed	Regular
✓	03/19/2021	1	03/15/2021 03:24:13 PM	Processed	Regular
✓	03/12/2021	1	03/09/2021 12:48:43 PM	Processed	Regular
✓	03/05/2021	1	03/01/2021 09:24:40 AM	Processed	Regular
✓	02/26/2021	1	02/22/2021 01:30:10 PM	Processed	Regular
✓	02/19/2021	1	02/15/2021 11:02:23 AM	Processed	Regular
✓	02/12/2021	1	02/08/2021 12:37:52 PM	Processed	Regular
✓	02/05/2021	1	02/01/2021 10:56:18 AM	Processed	Regular
✓	01/29/2021	1	01/25/2021 10:54:56 AM	Processed	Regular

Page 1 of 2 1 - 10 of 13 items

9 Select the employee who you would like to pull the report for.

Dashboard | Reports

DEFINED REPORTS | PUBLISHED REPORTS | AD HOC REPORTS

← REPORTS LIST Options for Payroll Register

Payroll Filter | EE Filter | Org Filter | Misc Options | Run Report

You can apply a filter to reduce the number of employees in the list. Fine tune the list by checking.

Search for employee(s)

<input type="checkbox"/>	EE #	SSN / EIN	Last Name	First Name	MI	Status
<input checked="" type="checkbox"/>	1	000-00-0000			G	Active
<input type="checkbox"/>	2	000-00-0000				Active
<input type="checkbox"/>	3	000-00-0000				Active
<input type="checkbox"/>	4	000-00-0000				Terminated
<input type="checkbox"/>	5	000-00-0000				Other _ See Notes
<input type="checkbox"/>	6	000-00-0000			M	Other _ See Notes
<input type="checkbox"/>	7	000-00-0000			E	Active

Page 1 of 1 | 1 - 7 of 7 ite

Task Queue

10 Click on RUN THIS REPORT

DEFINED REPORTS | PUBLISHED REPORTS | AD HOC REPORTS

← REPORTS LIST Options for Payroll Register

Payroll Filter | EE Filter | Org Filter | Misc Options | Run Report

Depending on your filters and options, this report may take a long time to generate. If you run this report a task will be placed in the queue to generate.

You will find an entry in the [task queue](#) for your generated report. You can then view the report from the queue entry.

Your current report definition is set as follows:

Date Range: 01/08/2021-03/31/2021

Payrolls: 13 Payroll(s) Selected.

Employees: 1 Employee(s) Selected.

Organization: Company

With options set:

- Include Memos in Totals
- Include Pieces from Piecework in Totals
- Break Employee Between Pages
- Include Taxable Memos in Totals
- Deductions as Taxes
- etc...

Group Level: Company

Group Sort: Group Code

Detail Sort: Employee Last Name

Group Type: Summary Detail

SUI: Do according to Company Setup

RUN THIS REPORT

Task Queue

11 Click on " Task Queue" to download the report.

The screenshot displays the 'Options for Payroll Register' configuration page. On the left sidebar, the 'Reports' menu is active, and the 'Task Queue' option is highlighted with an orange border. The main content area has a breadcrumb trail: 'REPORTS LIST' > 'Options for Payroll Register'. Below the breadcrumb are tabs for 'Payroll Filter', 'EE Filter', 'Org Filter', 'Misc Options', and 'Run Report'. The 'Run Report' tab is selected, showing a warning message: 'Depending on your filters and options, this report may take a long time to generate. If you run this report a task will be placed in the queue to generate.' It also provides instructions on how to find the report in the task queue and lists the current report definition settings, including date range, payrolls, employees, organization, and various options like 'Include Memos in Totals' and 'Group Level: Company'. A 'RUN THIS REPORT' button is located at the bottom of the configuration area.

Reports

DEFINED REPORTS
PUBLISHED REPORTS
AD HOC REPORTS

REPORTS LIST Options for Payroll Register

Payroll Filter EE Filter Org Filter Misc Options Run Report

Depending on your filters and options, this report may take a long time to generate. If you run this report a task will be placed in the queue to generate.

You will find an entry in the [task queue](#) for your generated report. You can then view the report from the queue entry.

Your current report definition is set as follows:

Date Range: 01/08/2021-03/31/2021

Payrolls: 13 Payroll(s) Selected.

Employees: 1 Employee(s) Selected.

Organization:
Company

With options set:

- Include Memos in Totals
- Include Pieces from Piecework in Totals
- Break Employee Between Pages
- Include Taxable Memos in Totals
- Deductions as Taxes
- etc...

Group Level: Company

Group Sort: Group Code

Detail Sort: Employee Last Name

Group Type: Summary Detail

SUI: Do according to Company Setup

Completed: 13
Unread: 0
Pending: 1

Task Queue

RUN THIS REPORT