

MILLENNIUM
REPORT
WRITER
Documentation



Millennium Report Writer

Creating a new report

From the 'Reports' screen click  at the bottom.

The following dialog will pop up...

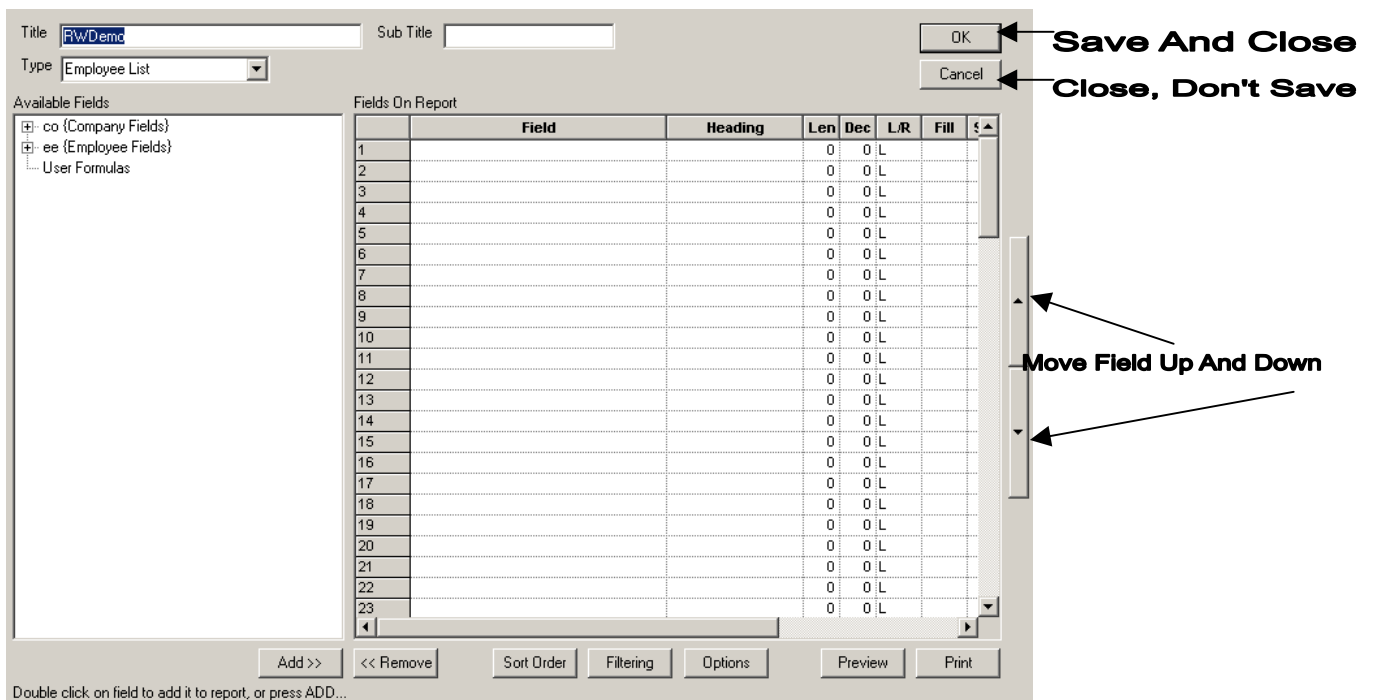


A dialog box with a text input field labeled 'Report ID' and two buttons: 'OK' and 'Cancel'.

Enter a report id click 'OK', the id will serve as a way to reference the report later. Millennium places all the available reports in alphabetical order by their id number. (Hint: You may find it useful to start your Report Writer reports with a common prefix so that they will all appear together in the list of reports).

Next find the report with the id that you just typed and highlight it, then click .

The following box will pop up. This is the main Report Writer window.






The main Report Writer window is shown. It includes a title field (RWDemo), a sub title field, and a type dropdown (Employee List). On the left is a tree view of available fields (Company Fields, Employee Fields, User Formulas). The main area is a table with columns: Field, Heading, Len, Dec, L/R, Fill, and a sort icon. The table has 23 rows. On the right side of the table are vertical arrows for moving fields up and down. At the bottom are buttons: Add >>, << Remove, Sort Order, Filtering, Options, Preview, and Print. On the top right are OK and Cancel buttons. Annotations with arrows point to the OK button (labeled 'Save And Close'), the Cancel button (labeled 'Close, Don't Save'), and the vertical arrows (labeled 'Move Field Up And Down').

Annotations:

- OK button: Save And Close
- Cancel button: Close, Don't Save
- Vertical arrows: Move Field Up And Down












(If you can't see this entire box you may need to increase the resolution of your monitor)

Basic Report Operations

-  The Report Writer 'Available Fields' are organized in a hierarchical tree view. In order to access the fields underneath a heading click the '+' sign next to the heading.
-  Fields are added from the list at left to the 'Fields on Report' list at right by highlighting the field and clicking the 'Add' button at the bottom of the screen. The field is then added to the next empty row.
-  Fields can be reordered by selecting the field on the list at right and then clicking the up and down arrows located at the far right of the Report Writer main screen.

Each field has its own properties as shown below...

	Field	Heading	Len	Dec	L/R	Fill	Show 0	Total	Rem Punc	Rem .	Rem ,	OvrPnch	UPCASE
1			0	0	L		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2			0	0	L		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3			0	0	L		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

-  Field - This is where the field for the report is specified.
-  Heading - What will appear on the report at the top of each page for the column.
-  Len - The length in characters of the column
-  Dec - The number of decimals that will be displayed (number fields only)
-  L/R - Right or left justification
-  Fill - The fill character for the field, the field will be filled with this character to the length specified in 'Len'
-  Total - Includes a total for the field at the bottom of the report and after each group
-  Rem Punc - Removes commas, dashes and other punctuation from the field
-  Rem, - Removes commas only from the field
-  OvrPnch - Replaces the last number of a numeric field with a corresponding letter. 1 = a, 2 = b, 3 =c etc. (Rarely Used)
-  UPCASE - Checked by default, this forces all output to Uppercase.

What is a field?

A Field generally refers to a column in a database. You can also use formulas in place of fields in the 'Fields on Report', 'Sort Order' and 'Filtering' sections of the Report Writer. There are two special formulas they are 'sys.dateStart' and 'sys.dateEnd' these represent the Beginning and Ending dates for the report as specied under report 'Properties'. These properties are very similar to the 'Date1' and 'Date2' formulas in Rapid PC. See the appendix for a complete field listing.

Sort Order

Click the sort order button to bring up the sorting and grouping fields for the report.

	Field	Description	Sub Total
1	ee.zip	Zip Code	<input checked="" type="checkbox"/>
2	ee.lastname		<input type="checkbox"/>
3			<input type="checkbox"/>
4			<input type="checkbox"/>

Here you can click in the fields that you want to sort by. Checking the 'Sub Total' box will put a break in the report every time the value specified under 'Field' changes. For instance below is an example of a report with a zip code sub total and then sorted by last name. The check mark in the 'Sub Total' check box tells the report to put a total line every time the field ee.zip changes.


Zip	Last Name	First Name	YTD Reg
77060	BEAL	DAVID	
77060	BENNETT	STEPHEN	3432
77060	BERUBE	JOHN	1040
77060	FISHER	ALLISON	624
77060	MEDICUS	JEREMY	
77060	REARDON III	JOHN	26240
77060	SMITH	JENNY	1800
77060 Total			33136
77066	DAVIS	GARY	
77066 Total			0
77085	COURSEN	MIKE	34259.94
77085 Total			34259.94
77090	KEMBLE	JON	
77090	WHITE	DEBRA	
77090 Total		0	
Grand Total			70272.38

Filtering


Filtering helps you create professional looking reports that only contain the data that needs to be seen. By default every report you create in the Report Writer will include every employee in your database regardless of status. It is possible to exclude employees based on any piece of data available in the Report Writer. It is not a requirement that a field be listed on the printed report for you to use it in the filtering.

Before we go any further it is necessary that you understand a little bit about data types... Fields in databases have different data types so that data stored in them can be easily manipulated. For example it is necessary for the database to know the difference


between a Date and a Text field so that it can know how to sort them appropriately. When specifying filtering for a report you must 'Type' the data that you are supplying as the value. That is you must tell the report what kind of data is in your value field so that you are sure that you are comparing apples to apples. There are four basic *types* of fields in the database...

 Date Fields – Pound signs (#) must surround data meant to represent a date. For example 1/1/02 needs to be written as #1/1/02#.


Field	Comp	Value	And/Or
ee.termDate	>=	#4/1/02#	AND
ee.termDate	<=	#5/1/02#	AND

 Text Fields – Quotation marks must enclose text data e.g. "A". Note that sometimes data that appears to be a number is actually text. Department numbers are a good example, department 17 needs to be "17".

Field	Comp	Value	And/Or
ee.cc1	=	"1003"	OR
ee.cc1	=	"1005"	OR

 Number Fields – Number fields do not need any extra symbols around them. The number 10 is written as 10.

Field	Comp	Value	And/Or
ee.Rates("Base").salary	>	800	AND
ee.Current("D","Den").amount	<>	0	AND

 Yes/No Fields – These fields are shown in the database as check marks. 1 indicates checked or Yes and 0 indicates unchecked or NO.

Field	Comp	Value	And/Or
ee.miscCheck1	=	0	AND
ee.miscCheck2	=	1	

If you are unsure of the type of data in a field look it up in the Appendix. The data type for every field is listed there.

About Blank Fields

Many fields in the database, such as termDate, can be left blank. To create a filter to show employees who have nothing in field use the word 'Blank' in the value section of the filtering. For instance ee.termDate = Blank will show employees without a term date.

Pulling Deduction Setup Information

At the bottom of the list of 'Employee Fields' are 6 more headings with a '+' sign beside them. The first of these is 'Deductions'. Under this heading you will find a list of every deduction set up in your company. Each deduction is also a heading (has a '+' sign beside it) and underneath each deduction are fields relevant to the deduction setup. The data types for these fields are listed in the Appendix.

Pulling Totals For Payroll Codes

One of the most powerful features of the Report Writer is that it can supply totals for individual deduction, earning and tax codes as well as for 'code groups'. The next four headings after the 'Deductions' heading are used for this purpose, they are CYTD, CQTD, CMTD, and Current. These can be used to display Year to Date, Quarter to Date, Month to Date and Current information respectively.

+	Deductions
+	CYTD
+	CQTD
+	CMTD
-	Current
+	Gross {Curr Gross} {R12.2}
+	% {Curr Percentage} {R12.2}
+	401 {Curr 401(k) Eligible Earnings} {R12.2}
-	401(k) {Curr 401(k) Contributions} {R12.2}
	hours {Curr 401(k) Contributions Hours}
	amount {Curr 401(k) Contributions Amount}
	taxable {Curr 401(k) Contributions Taxable}
	cappedTaxable {Curr 401(k) Contributions Capped Taxable}
+	Child {Curr Child Support} {R12.2}
+	Garn1 {Curr Garnishment} {R12.2}
+	Health {Curr All Health Insurance Deductions}
+	PTO Codes {Curr Paid Time Off Codes}
+	Vac Eligible {Curr Vacation Accrual Eligible}
-	D-401k {Curr 401K} {R12.2}
	amount {Curr 401K} {R12.2}
+	D-401L {Curr 401Loan} {R12.2}

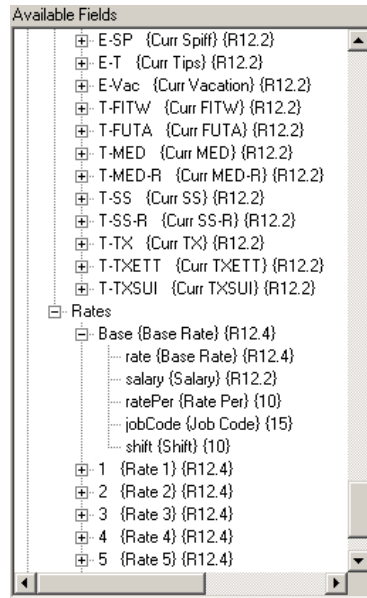
Current does not necessarily display information from your most recent or current payroll. Current refers to whatever time frame is specified in the report properties. In other words you can get YTD, QTD and MTD totals by using the fields under 'Current' just by changing the date range for the report. For this reason you will find that using the Current fields will make your reports more flexible. There are two reasons that you might not want to use 'Current'. The first is if you need totals on your report from two different time period i.e. Current and QTD. The other is that pulling year to date totals from YTD is faster than from current. Listed under Current first are your code groups, deductions, earnings and finally taxes.

Setting Up New Code Groups

To set up a new code group for use in the Report Writer, go to 'Company Setup' to the 'Misc Tables' tab and choose 'Code Group', click on the '*' line at the bottom. Type in a name and description for this code group and then click on 'Properties'. Click the appropriate check box for 'Earnings', 'Deductions' or 'Taxes'. Select the codes that you want included in the group and then click 'OK' to save it. If you are not sure if this code group will be transmitted to Alliance Payroll with your next payroll please call to make sure you won't lose the setup for this item. After exiting your company and going back in the code group will be available in the Report Writer. Note: It is helpful to include 'RW' in your code group descriptions so that the group's purpose is known.

Pulling Rate Information

The last item at the bottom of the employee fields is the 'Rates' heading. Underneath this section you can pull the employees base rate and salary as well as any additional rates that are set up on the 'Rates' tab.

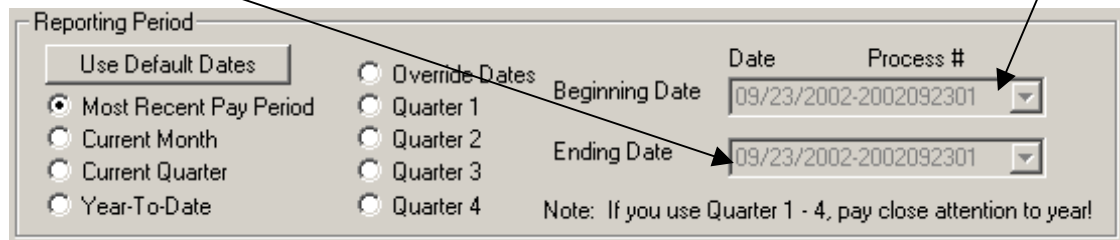


Report 'Options'

Access the Report Writer options screen by clicking the 'Options' button. You can also get here by right clicking your Report Writer and choosing properties. Here you can specify the beginning and ending dates for the report as well as printing and export options.

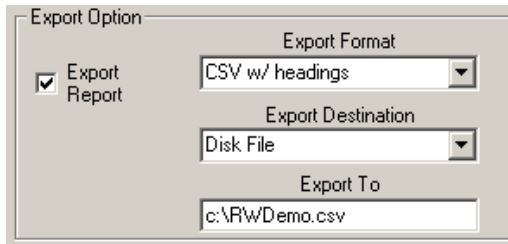
Date Selection

Select the time frame for your report in the 'Reporting Period' frame. This can be a single pay period, month, quarter, year to date or any custom begin and end date that you choose including dates that are not actual check dates. To specify dates that are not check dates, click 'Override Dates' highlight the date and then type the date that you want and press TAB. Millennium will automatically fill in the process number for you. The dates on this screen get passed into the Report Writer in the form of the formulas 'sys.dateStart' and 'sys.dateEnd.'



Exporting

To export the report, click on the Display Properties tab and click the Export Report check box. First select your Export Format, select 'Disk File' under Destination and then type in the path for the export under 'Export To', be sure to include a file extension if one is desired. When the export report box is checked, printing the report from Millennium



Export Option

Export Report

Export Format: CSV w/ headings

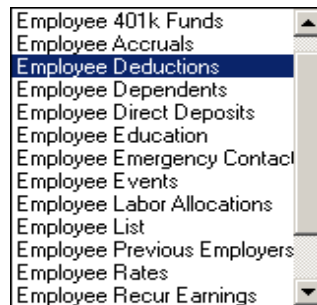
Export Destination: Disk File

Export To: c:\RWDemo.csv

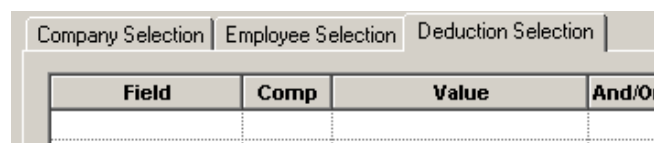
will cause the file to be exported and not printed. You can still get a hard copy of the report by previewing it and then printing from within Acrobat Reader. Note: If you specify export path to an invalid folder or drive, no error will occur, the file just doesn't get exported.

Other Report Types

The current version of the Millennium Report Writer (2.4.95 and higher) has expanded reporting capabilities. With these newer versions you are able to create other types of reports other than 'Employee List'. Think of the employee list as displaying one row on the report per employee. The other reports display one row for each item being reported on.



For instance a report with a type of 'Employee Deductions' will show one row for each deduction that each employee has. If an employee has no deductions that employee will not be shown on the report at all. These other report types also provide an extra tab on the 'Filtering' screen where criteria specific to the report type being utilized can be entered.



Field	Comp	Value	And/Or

Appendix 1 – Field Listing

Employee Demographic Fields

Field Name	RW Order	Data Type	Note
co	1	Text	
id	2	Text	Right Justified, Filled With Leading Spaces to 6 characters
lastname	3	Text	
firstname	4	Text	
middlename	5	Text	
address1	6	Text	
address2	7	Text	
city	8	Text	
state	9	Text	
zip	10	Text	Includes the Dash if zip + 4 is used
county	11	Text	
country	12	Text	
ssn	13	Text	Includes the Dashes, to remove click the 'Rem Punc' Check Box
birthdate	14	Date	
sex	15	Text	"M" or "F"
empStatus	16	Text	"A" for active, "T" for terminated
empType	17	Text	Typically "RFT", "RPT", "TFT" or "TPT"
payGroup	18	Text	Choices defined in Company Setup
hireDate	19	Date	
rehireDate	20	Date	
adjSeniorityDate	21	Date	
termDate	22	Date	
termReason	23	Text	
newhireReportDate	24	Date	
cc1	25	Text	
cc2	26	Text	If Used
cc3	27	Text	If Used
wcc	28	Text	Choices defined in Company Setup
clock	29	Text	
lastRaiseDate	30	Date	
defaultHours	31	Number	
payFrequency	32	Text	
autoPay	33	Text	"Hourly", "Salary" or Blank
jobCode	34	Text	
tipped	35	Text	
salutation	36	Text	
surname	37	Text	
nickname	38	Text	
priorLastName	39	Text	
ethnicity	40	Text	Choices are defined in Company Setup
maritalStatus	41	Text	"M", "S" or Blank

disabilityDesc	42	Text	
veteranDesc	43	Text	
smoker	44	Yes/No	
positionCode	45	Text	
positionInfoLocked	46	Yes/No	
title	47	Text	
eeoClass	48	Text	
flsaOTExempt	49	Yes/No	
workPhone	50	Text	With all punctuation, click 'Rem Punc' to remove
workPhoneExt	51	Text	
mailStop	52	Text	
emailAddress	53	Text	
taxForm	54	Text	
pension	55	Yes/No	
statutory	56	Yes/No	
deceased	57	Yes/No	
deferredComp	58	Yes/No	
legalRep	59	Yes/No	
domesticEmpl	60	Yes/No	
seasonal	61	Yes/No	
i9verified	62	Yes/No	
i9Reverify	63	Date	
citizenship	64	Text	
visaType	65	Text	
visaExpiration	66	Date	
unionCode	67	Text	
unionDate	68	Date	
unionInitFees	69	Yes/No	
unionDues	70	Yes/No	
supervisorID	71	Text	
supervisorName	72	Text	
user1	73	Text	Custom Field
user2	74	Text	Custom Field
user3	75	Text	Custom Field
user4	76	Text	Custom Field
user5	77	Text	Custom Field
user6	78	Text	Custom Field
user7	79	Text	Custom Field
user8	80	Text	Custom Field
miscCheck1	81	Yes/No	Custom Field
miscCheck2	82	Yes/No	Custom Field
miscCheck3	83	Yes/No	Custom Field
miscCheck4	84	Yes/No	Custom Field
miscCheck5	85	Yes/No	Custom Field
ee401kDeferral	86	Number	From 401K Tab (System Filled)
ee401kCalc	87	Text	From 401K Tab (System Filled)
ee401kEligibleDate	88	Date	From 401K Tab
ee401kStatus	89	Text	From 401K Tab
ee401kSuspendDate	90	Date	From 401K Tab
er401kMatch	91	Number	From 401K Tab
highComp	92	Yes/No	
owner	93	Yes/No	

ownerPercent	94	Number
ownerRelated	95	Yes/No
ownerSSN	96	Text
memo	97	Text
showMemo	98	Yes/No

Deduction Fields

dcode	1	Text	
calcCode	2	Text	
tabled	3	Yes/No	
rate	4	Number	
startDate	5	Date	
endDate	6	Date	
goal	7	Number	
paidTowardsGoal	8	Number	
frequency	9	Text	
lastDate	10	Date	
annualMaximum	11	Number	
minimum	12	Number	
maximum	13	Number	
agency	14	Text	
miscInfo	15	Text	Case Number
arrear	16	Number	Amount by which deduction is over/under paid

To Date Fields

YTD, QTD, MTD and Current

Hours	1	Available for Earnings and Code Groups
Amount	2	Available for Deductions, Earnings, Taxes and Code Groups
Taxable	3	Available for Taxes and Code Groups
Capped Taxable	4	Available for Taxes and Code Groups

Appendix 2 – Formula Examples

Date Formulas

Report Start Date	sys.dateStart
Report End Date	sys.dateEnd
2 weeks before start date	sys.dateStart - 14
Days between Start And End Date	sys.dateEnd - sys.dateStart
Age in Years as of End Date	int((sys.dateEnd - ee.birthDate)/365)
Year of End Date	Year(sys.dateEnd)
Jan 2 of End Date Year	DateSerial(year(sys.dateEnd),1,2)
Years of Service as of Jan 1,2002	int((#1/1/02# - ee.hireDate)/365)
Current Date	Date()
Tomorrow	Date() + 1
Age When Hired	int((ee.hireDate - ee.birthDate)/365)
Day on Month Hired	day(ee.hireDate)
Month Born	month(ee.birthDate)
Percent of Year Completed	(sys.dateEnd - DateSerial(year(sys.dateEnd),1,1))/365

Numeric Functions

Base Rate Times 1.5	ee.rates("Base").rate * 1.5
Salary Divided by 2	ee.Rates("Base").salary / 2
YTD Reg Amount (Code 2)	ee.CYTD("E","2").amount
Annual Salary	ee.rates("Base").rate * 2080
Add Current E2 and E3 Together	ee.Current("E","2").amount + ee.Current("E","3").amount
Predicted Year End Amount Code 2 (YTD E2 * (365/Days Elapsed))	ee.CYTD("E","2").amount * (365 / (sys.dateEnd - DateSerial(year(sys.dateEnd),1,1)))

Text Functions

Last, First Name	ee.lastName & ", " & ee.firstName
City, State Zip	ee.city & ", " & ee.state & " " & ee.zip
Last 4 of SSN	right(ee.ssn,4)
First 5 of Zip Code	left(ee.zip,5)
3 rd and 4 th characters of department	mid(cc1,3,2)
Length of Last Name	len(ee.lastname)
Convert Text To a Number	val(ee.cc1)