

Employee Navigator Reports

To provide an efficient integration implementation with Employee Navigator, Paycor created pre-configured reports with Deduction and Demographic data within Reports & Analytics. The last page of this guide contains the exchanged fields between Paycor and Employee Navigator.

Note: To access these reports, your organization must be set up to integrate with Employee Navigator, a Benefits Administration provider. Contact your Paycor representative to learn more.

Deduction and Demographic Info Reports

Follow the steps below to review and run the Deductions or Demographic report.

The steps are the same for each report; only the Columns of data are different between the two reports. See Figures 1 and 2 for a list of each report's data fields.

- 1 In the **Reporting** area, click **Reports & Analytics** then select the **Standard Templates** tab.
- 2 Click either the **Employee Navigator Deductions Info**, or **Employee Navigator Demographic Info** report.
- 3 (Optional) If your organization has multiple client IDs with Paycor, you may choose to only run the report for a subset of IDs by using the Clients filter. After selecting the clients, click to **Apply These Filters**.
- 4 If desired, you may review the columns within the report by clicking on **Customize Analysis Grid**. Because the report is pre-configured, it is best practice to not change the analysis grid selections.
- 5 To export the report, click **Export** to choose Excel or CSV. This report will remain available in your Standard Reports tab, so there is not a need to save the report as a custom template.

The screenshot shows the PERFORM web application interface. At the top, there is a navigation bar with the PERFORM logo and user information: 'Welcome, Suneeta My Settings Sign Out'. Below this is a secondary navigation bar with links for 'Home', 'Company', 'Employees', 'Reporting', 'Me', and 'Resources'. On the right side of this bar are links for 'Get Help' and 'Give Feedback'. The main content area is titled 'Standard Templates' and features a 'Create Reports & Analytics' button with a dropdown menu containing 'View Workforce Insights' and 'Total Compensation Organizer'. A 'New Template' button and a search box for reports are also present. Below this is a table with the following data:

Template Name	Description	Type	Last Run	Actions
Employee Navigator Deductions Info	This report provides the Employee Navigator Deductions Info	Interactive	04/16/2018	[Icon]
Employee Navigator Demographic Info	This report provides the Employee Navigator Demographic Info	Interactive	04/23/2018	[Icon]

Screenshots continued on next page

Home Company Employees Reporting Me Resources Get Help Give Feedback Custom Templates

Export Save As

Employee Navigator Deductions Info

Basic Filters

Clients

All Selected

Filter 3

Filter Clients

Select Clients to add to your Basic Analysis Grid Filters.

Clients

106395-Rekha - SST - CWR - PFMR with Time

116266-Lewis Imp Client

116330-Automation client for HR Fusion

116732-Chaits - Client Setup

▲ Displaying first 500 results. Use Advanced Filters panel for larger results.

Cancel Save

Export Export

CSV

Excel 5

Apply These Filters

Advanced Filters Add Chart

Analysis Grid Customize Analysis Grid 4

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PayrollId	SSN	FirstName	LastName	DeductionCode	Amount
F3DE803E-20F7-0000-0000-00009B910000	879543546	Tommy	Smith	Union	25.0000
			Radencov	401kRoth	32.0000

Analysis Grid Customize Analysis Grid

Columns Sort Group Aggregate Paging

Hide and show columns.

(All) SSN LastName Amount

PayrollId FirstName DeductionCode

OK

Advanced Filters Add Chart

Analysis Grid Customize Analysis Grid

Columns Sort Group Aggregate Paging

Hide and show columns.

<input checked="" type="checkbox"/> (All)	<input checked="" type="checkbox"/> Gender	<input checked="" type="checkbox"/> TerminateReason	<input checked="" type="checkbox"/> Email
<input checked="" type="checkbox"/> CompanyId	<input checked="" type="checkbox"/> MaritalStatus	<input checked="" type="checkbox"/> Address1	<input checked="" type="checkbox"/> Phone
<input checked="" type="checkbox"/> PayrollId	<input checked="" type="checkbox"/> PayFrequency	<input checked="" type="checkbox"/> Address2	<input checked="" type="checkbox"/> PayEffectiveDate
<input checked="" type="checkbox"/> SSN	<input checked="" type="checkbox"/> JobTitle	<input checked="" type="checkbox"/> Address3	<input checked="" type="checkbox"/> CompensationBasis
<input checked="" type="checkbox"/> FirstName	<input checked="" type="checkbox"/> FullTime	<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> AnnualBaseSalary
<input checked="" type="checkbox"/> MiddleName	<input checked="" type="checkbox"/> Seasonal	<input checked="" type="checkbox"/> County	<input checked="" type="checkbox"/> BaseHourlyRate
<input checked="" type="checkbox"/> LastName	<input checked="" type="checkbox"/> HireDate	<input checked="" type="checkbox"/> State	
<input checked="" type="checkbox"/> Suffix	<input checked="" type="checkbox"/> EmploymentStatus	<input checked="" type="checkbox"/> Zip	
<input checked="" type="checkbox"/> DOB	<input checked="" type="checkbox"/> TerminateDate	<input checked="" type="checkbox"/> Country	

OK

Fig. 1: Deductions report columns

Analysis Grid Customize Analysis Grid

Columns Sort Group Aggregate Paging

Hide and show columns.

<input checked="" type="checkbox"/> (All)	<input checked="" type="checkbox"/> Gender	<input checked="" type="checkbox"/> TerminateReason	<input checked="" type="checkbox"/> Email
<input checked="" type="checkbox"/> CompanyId	<input checked="" type="checkbox"/> MaritalStatus	<input checked="" type="checkbox"/> Address1	<input checked="" type="checkbox"/> Phone
<input checked="" type="checkbox"/> PayrollId	<input checked="" type="checkbox"/> PayFrequency	<input checked="" type="checkbox"/> Address2	<input checked="" type="checkbox"/> PayEffectiveDate
<input checked="" type="checkbox"/> SSN	<input checked="" type="checkbox"/> JobTitle	<input checked="" type="checkbox"/> Address3	<input checked="" type="checkbox"/> CompensationBasis
<input checked="" type="checkbox"/> FirstName	<input checked="" type="checkbox"/> FullTime	<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> AnnualBaseSalary
<input checked="" type="checkbox"/> MiddleName	<input checked="" type="checkbox"/> Seasonal	<input checked="" type="checkbox"/> County	<input checked="" type="checkbox"/> BaseHourlyRate
<input checked="" type="checkbox"/> LastName	<input checked="" type="checkbox"/> HireDate	<input checked="" type="checkbox"/> State	
<input checked="" type="checkbox"/> Suffix	<input checked="" type="checkbox"/> EmploymentStatus	<input checked="" type="checkbox"/> Zip	
<input checked="" type="checkbox"/> DOB	<input checked="" type="checkbox"/> TerminateDate	<input checked="" type="checkbox"/> Country	

OK

Fig. 2: Demographic report columns

Appendix

Exchanged Fields

The following data fields flow between Paycor and Employee Navigator. The Direction column indicates if that field flows between both Paycor and Employee Navigator, or only from Paycor to Employee Navigator.

Employee Navigator Field	Paycor Field	Direction
Address 1	Address Line 1	Bi-Directional
Address 2	Address Line 2	Bi-Directional
City	City	Bi-Directional
State	State	Bi-Directional
Zip	Zip	Bi-Directional
Primary Email	Email	Bi-Directional
Home Phone	Home Phone	Bi-Directional
Annual Base Salary	Pay Rate 1 * Pay Frequency	Paycor to EN only
Compensation Basis	FLSA	Paycor to EN only
DOB	Birth Date	Paycor to EN only
First Name	Legal First Name(else first name)	Bi-Directional
Gender	Gender	Bi-Directional
Hire Date	Hire Date	Paycor to EN only
Hourly Rate	Pay Rate 1	Paycor to EN only
FullTime	Status Type	Paycor to EN only
Job Title	Job Title	Bi-Directional
Last Name	Last Name	Bi-Directional
Middle Name	Middle Name	Bi-Directional
Pay Effective Date	Pay Rate Effective Date	Paycor to EN only
Payroll ID	Employee ID	Paycor to EN only
SSN	Social Security Number	Paycor to EN only
Termination Date	Termination Date	Paycor to EN only