

Finding Quarterly Reports

Steps:

- Reports & BI
- Quarterly & Year End Archive

Step 1 –

Navigate to **Reports & BI** under **My Company**.

The screenshot shows the Viventium user interface. At the top, there is a dark header with the Viventium logo on the left, the user name '988AA-001 - Test Co. - Alexa...' in the center, and a search bar on the right. Below the header, a sidebar on the left contains a 'MY COMPANY' section with a list of menu items: Dashboard, Documents, Employees, Requests, Calendar, Payroll (highlighted with a purple box), and Reports & BI. The main content area displays a greeting 'Good morning, Christine' and a section titled 'Upcoming' with two tabs: 'REMINDERS' (active) and 'TASKS' (with a red circle containing the number 4). Under the 'REMINDERS' tab, there is a notification for 'Driver's License Expiration Date' with a bell icon, stating 'Added to Jennifer C Smith' and 'May 16, 2018'.

Step 2 –

Select **Quarterly & Year End Archive**.

The screenshot shows the 'Reports & BI' section of the Viventium interface. It features a grid of four tiles. The top-left tile is 'Report Library' with a document icon and a description: 'View, print or download any report in Excel or PDF. Customize those reports using parameters such as Sorts & filters.' The top-right tile is 'Payroll Archive' with a clock icon and a description: 'View, print or download reports that were generated during payroll processing.' The bottom-left tile is 'Quarterly & Year End Archive' with a clock icon and a description: 'View, print or download quarterly and year end tax forms such as w2's, US-940, US-941 etc.' This tile is highlighted with a purple box. The bottom-right tile is 'Business Intelligence' with a line graph icon and a description: 'Drag and drop any of your data to create custom analytics reports with over 15 visualization options.'



Step 3 –

Select **Download Attached** or **View Details**.

< Reports & BI			<input type="checkbox"/> All Divisions	Jan 1, 2019 - Dec 31, 2019	
	Quarterly & Year End Archive	Company	Year	Quarter	
	View, print or download quarterly and year end tax forms such as w2's, US-940, US-941 etc.			Q3	VIEW DETAILS ↓
				Q2	VIEW DETAILS ↓
			Q1	VIEW DETAILS ↓	

If the **Quarterly & Year End Archive** is blank, please contact your Dedicated Client Service Team to enable Online Reports.

Still have questions? Contact your Dedicated Client Service Team or email us:

North Star Clients - csnorthstar@viventium.com

Health Services Clients - cshealth@viventium.com

Online Clients - csonline@viventium.com