

# Online Quick User Guide

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*Filtered to only show a certain field, like Dept: Office: .....27*  
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**Note: At any screen if you click on our logo at the left top corner it will bring you back to the home page.**

## Employee Maintenance

### Hire New Employees:

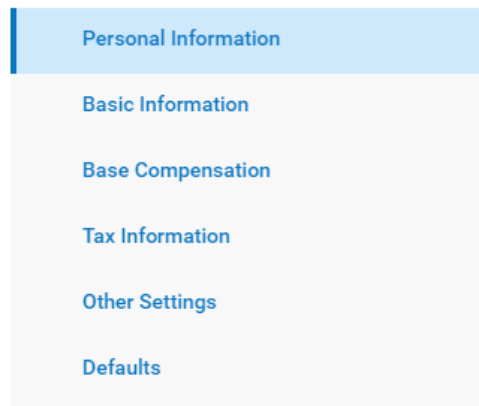
- Click on **My Team > Employee Information > Hire**. (This can also be accessed directly from your Favorites tab underneath the Hamburger menu in the top left corner of your screen.)



- There are 6 sections that are required to hire an employee:
  - Personal Information
  - Base Information
  - Base Compensation
  - Tax Information
  - Other Settings
  - Defaults

GLOBAL ACCOUNT POLICIES

- Be sure to click “Continue” to go on to the next section
- If you feel a specific field is unnecessary, choose the option at the top or bottom “**Global Account Policies**”, you then have the ability to uncheck an option, and that will change this field so that it is no longer mandatory.



### **Personal Information**

- The system will auto-generate the employee’s ID, username, and password
  - The system will auto-generate the password to the last 4 of the employee’s social security number
- Enter in the employee’s first and last name

## Basic Information

- Address: Once you fill in the zip code, the system will automatically populate the City/State. You can also click the “Recommend” button to check the address accuracy through the UPS database
- Primary National ID is required: Enter in the employee’s social security number
- Email: Enter in the employee’s email

## Base Compensation - Hourly Employees:

- Click the 3 Dot Symbol to edit the employee’s base compensation & click “edit”
- A pop-up called “Edit Base Compensation” will show up and this is where you will edit the employee’s base compensation

Effective From \* 12/31/1900 Amount \$ 0.00

Per Year Hours 2080.00

Per Year PP in Year \* 52

Amount Earning Autopay Autopay Type Amount

CANCEL SAVE

- **Amount**: Enter in the hourly rate for the employee
- **Per**: Select Hour
- **Hours**: The system automatically calculates 40 hours per week, which comes out to 2080 hours per year. This is for informational purposes only.
- **Per**: Default is per Year, you may change it as you desire (PP means per Pay Period).
- **PP In Year**: System will automatically fill in the amount of pay periods per year according to your company’s pay schedule.
- **Auto Pay Amount Earning**: If you want this employee’s hours to reflect on the batch choose “regular”, otherwise you can leave it blank.
- **Auto Pay Type**: If you want this employee’s hours to come up automatically on the batch, choose “hours”. (If you are scheduled for a weekly payroll, the batch will auto-populate 40 hours based on the number of hours entered in the “hours” field above; However, if you want a different figure, change the amount of hours in that field).

- **Note:** If you choose the auto option you might get a warning that it can create duplicate pay. You can ignore the warning by checking the warning box.

### Base Compensation Setup – Salaried Employees:

- Click the 3 Dot Symbol to edit the employee’s base compensation & click “edit”.

- **Amount:** Enter the dollar amount that the employee is paid per pay period.
  - **Per:** Enter PP (pay period)
  - **Hours:** The system automatically calculates 40 hours per week, which comes out to 2080 hours per year. This is for informational purposes only.
  - **Per:** Default is per Year, you may change it as you desire (PP means per Pay Period).
  - **PP In Year:** System will automatically fill in the amount of pay periods per year according to your company’s pay schedule.
  - **Auto Pay Amount Earning: If you want this employee’s pay to come up automatically on the batch, choose “Salary”**
  - **Auto Pay Type:** If you want this employee’s pay to come up automatically on the batch, choose “amount”.
- When you give an employee a raise, click the + sign on the right and enter the new amount. If you just modify the existing record, you will lose the employee compensation history.

## Tax Information:

- Click the 3 Dot Symbol to edit the employee's base compensation & click edit

Tax Information

FEDERAL

STATE

LOCAL

GENERAL

Actions

Edit

- **Federal:** enter the Employee's Filing Status & Number of Allowances

Edit Federal Income Tax

From Date \*

12/31/1900

EE Withhold \*

Yes

Filing Status \*

Single

Lock in Letter Received

Number of Allowances

0

Type

\$

Additional Withholding

0.00

Rounding \*

Default

Type

\$

Override Amount

0.00

- **State:** enter the Employee's Filing Status & Total Dependents
- If you want to exempt an employee from Federal or State Income taxes, click on the magnifying glass at the Federal or State level and choose "Block"
  - Note: the magnifying glass would only appear after the new employee has been created. Never click "Exempt", always "Block"!

## Other Settings

- Enter in the required information that is needed

## Terminate Employees:

- Click on **My Team > Employee Information** and find the employee you want to terminate
- Go to the “Date” Section of the employee’s profile and click on “Terminate”

### Dates

Hired	07/22/2016	Terminated		<b>TERMINATE</b>
Started	07/22/2016	Review		
Birthday*	01/01/1986	Seniority		
Re-Hired		Benefits		
Deceased		Retired		
Frozen Benefit				

Employee Age: 33  
Employment Length: 3 Years, 4 Months  
Years of Service: 3 Years, 4 Months

- Enter in the Termination Date of the employee and click “Continue Termination” at the top right. The employee is now terminated from the system.

### Termination Info

Account Status*	Terminated	<b>CONTINUE TERMINATION</b>
Employee*	Test Employee	
Termination Date*		

## Rehire Employee:

- Click on **My Team > Employee Information** and enter in the employee’s name and change the Employee Status to = Terminated and the employee’s name should show up. Click on the “Employee Information” icon to enter into their profile.
- Go to the “Date” Section and click on “Rehire”
- Enter in the Rehire Date of the employee and click “Rehire Employee”. The employee is now rehired into the system.
  - Note: when you rehire an employee in the system, be sure to have their updated information and/or tax forms and direct deposits if there was any changes.

Employee Status

Clear Filter

Column Filter

=

Terminated

CANCEL APPLY

## Direct Deposit Setup

- Click on **My Team > Employee Information** and find the employee that you will be adding a Direct Deposit to and click on the “Employee Information” icon.
- Click on the “Payroll” tab at the top, and then go to the Direct Deposit section.
- Click on “**New Direct Deposit**”

- Fill in the necessary information,
  - **ABA Banking Routing #:** enter in the employee’s bank routing number
    - You can click Validate to confirm the routing number is for the correct bank
  - **Account #:** Enter in the employee’s bank account number
  - **Pre-Note Status:** You will check off this box if the employee provided you with a Voided Check or a Direct Deposit form from the bank with the Routing and Account Number; this is verifying that the numbers provided are correct
    - If an employee did not provide a voided check or direct deposit form, you will not check off the box. A pre-note will be sent off to verify the numbers are correct.
  - “Entire/Remainder” would be the default which is the entire compensation to One bank account
- If an employee requests to have their pay split between two or more different bank accounts, you are able to do so. The same steps will follow as above but, the Calculation Method will change based on the employee’s request.
  - Under Calculation Method drop down you can choose:
    - Flat \$ amount: an employee request a certain amount to go into one account (example: \$100 flat \$ amount)
    - % of Net Pay: an employee request a certain percentage to go into one account (example: 25% of Net Pay)
  - There is an option to “**Reserve Live Check**” - which is used when an employee wants to receive a certain amount of his pay by check and the remainder by direct deposit.
    - Example: if an employee receives \$700 per pay and wants \$400 paid by check with the remainder by direct deposit, you would put on a “Reserve Live Check” for \$400, and set up a direct deposit for the remaining amount, by choosing the option entire/remainder
  - **Note:** A hold is automatically placed on every New Direct Deposit for 5 business days in order for us to verify that the account is a valid open account. If there are no issues the hold will automatically go down after 5 days.



- If there is any payroll processed in the 5 days, the employee will continue to receive a paper check. **If you would like for the direct deposit to be active immediately, select the check box to the right of the account number to cancel the pre-note hold.**

## Deduction Setup:

- Click on **My Team > Employee Information** and find the employee that you will be adding a Deduction to and click on the “Employee Information” icon.
- Click on the “Payroll” tab at the top, and then go to the Deduction section.
- Click “New Deduction”, choose the Deduction that you want to setup
  - Enter in the Begin Date of the Deduction and leave the End Date Blank
  - To enter in the amount to be deducted per pay, you would go to the Settings section and enter in the amount in the Amount \$ field
    - By default it’s set to a Flat \$ Amount, however you may also choose to use a percentage

The screenshot shows a form titled "EMPLOYEE" with several input fields and a dropdown menu. The "Amount \$\*" field is set to "50.00". The "Flat \$ Amount" dropdown menu is open, showing options: "Flat \$ Amount" (selected with a checkmark), "% Of Disposable Earnings", "% Of Earnings List", "% Of Earnings+Deduction Lis", "% Of Earnings-Deduction List", "% Of Gross Earnings", "% Of Net Pay", "Formula Based", and "Rate \* Hours". Other fields include "Minimum" (N/A), "Maximum" (N/A), and "Frequency\*" (Every Scheduled Pa). Below the form, there is a section for "Arrearage Settings" with fields for "Arrearage Fr" and "Arrearage Recovery Per Pay Sta".

- **Frequency:** by default it’s set to “Every Scheduled Pay”. If you click on the drop down, you will have various other options: Every Second Check, Monthly, Every Pay.
  - Note: “Every Pay” means if you do an extra payroll, other than your scheduled payrolls - for example a bonus payroll, it will also take it out of that check
  - **Be sure to check the Frequency while setting up Deductions!**
  - **Check off the Block Last (3<sup>rd</sup> or 5<sup>th</sup>) if the Deduction shouldn’t be taken out on those payrolls**
- Click Save at the top right of the screen.

- **Setting up a Goal:** You will be able to setup a Goal after you have saved the Amount that will be deducted from each pay.

Goal

ENABLED

GOAL \$	TAKEN TOWARDS CURRENT GOAL \$	REMAI
\$1,000.00		

Times Goal Met

Reset Balance Type

[Change Amounts](#) [Taken History](#)

- You will see a Goal section, click on the checkbox on Enabled and click on “Change Amounts” – put in your Goal amount, for example \$1,000, in the Goal field and click Ok to save the amount. The goal is now setup for this deduction!
    - The system will automatically deduct \$50 from every paycheck until it reaches \$1,000 in this example.
  - At any given time you want to see how much was taken already or the remaining balance, you would come back to this screen and under Goal, you will be able to see the progress.
- **Setup Deduction with a Vendor:** You have the option to apply a Vendor (third party) to the deduction, the system would automatically create a check with each payroll payable to that Third Party and you can mail in the check
    - You must contact us to have this setup!

### **Change Employee Personal Info:**

- Click on **My Team > Employee Information** and find the employee that you will be making a change to and click on the “Employee Information” icon and click on the “Main” tab. This is where you will find the employee’s demographic/pay rate/dates/etc.
- **Note:** If an employee has an incorrect Social Security Number in the system, you would need to change this as soon as possible, please let your Account Manager know. You will need to provide the employee’s name, incorrect social, and the correct social security number.

### **Change Employee Primary EIN:**

- Go to **My Team > Employee Information** and find the employee you want to change. At the top right click on the three horizontal dots; you will get an option to “SWITCH PRIMARY EIN”. Once you select that option a new window will open allowing you to select the new Primary EIN. This feature helps if the employee is active in two EINs but being terminated in one EIN which is not their primary EIN.

## Change Compensation:

Base Compensation

CURRENT COMPENSATION	
Amount \$	Hours
Annual 31,200.00	2080.00
Pay Period 1,200.00	80.00
Hourly 15.00	

AMOUNT \$	PER	HOURS	PER	PP IN YEAR	ANNUAL \$	AUTOPAY AMOUNT EARNING	AUTOPAY TYPE	EFFECTIVE FROM
15.00	Hour	2080.00	Year	26	31,200.00		Amount	12/31/1900

AUTOPAY SCHEDULE

Used for Prorating Autopay Earnings.

- Go to **My Team > Employee Information** click on the employee you want to change.
  - Under the “Main” tab, go to the Base Compensation section, click on the + sign to the right, a new line will pop up above the current pay (we like to do this so we can keep a history of the employee base rate)
  - Enter in the new amount with an effective date
    - **Note: effective date is based on check date not pay period!**

## Change/Cancel Direct Deposit:

- Go to **My Team > Employee Information** click on the employee you want to change
  - Go to the “Payroll” tab and go to the Direct Deposit section
  - To end a Direct Deposit put an “End Date” in the “Active To” column

ACTIVE FROM	ACTIVE TO
12/31/1900	11/22/2019

- The system will automatically issue the employee a paper check if a new direct deposit is not set up after ending the current direct deposit
- If the employee is setting up a new Direct Deposit, you would do the same steps as above for ending the Current Active Direct Deposit and click “New Direct Deposit” to enter in the new Bank Account information and the date when the Direct Deposit should become active.

ACTIVE FROM	ACTIVE TO
12/31/1900	11/22/2019
11/22/2019	12/31/9999

- Note: To see the history on all bank accounts for this employee, click the “All” tab under Direct Deposits section to view

## Change/Cancel Deduction:

- Click on **My Team > Employee Information** and find the employee that you will be changing a Deduction for and click on the “Employee Information” icon
- Click on the “Payroll” tab at the top, and then go to the Deduction section
- You may either end the deduction by putting an end date or you change the amount and any other relevant information
- Note: To see the history of all past deductions for this employee, click the “All Scheduled” sub tab under Deductions


## Change Employee Marital/Dependents Status:

Federal State Local General








EE WITHHOLD	FILING STATUS	# OF ALLOWANCES	ADDITIONAL WITHHOLDING	OVERRIDE AMOUNT	ROUNDING	FROM	
<input type="checkbox"/>	Yes ▾	Married ▾	Lock In Letter Received <input type="checkbox"/> Allowances <input type="text" value="0"/>	\$ ▾ <input type="text"/>	\$ ▾ <input type="text"/>	Default ▾	12/31/1900 <input type="button" value="+"/>

- Click on **My Team > Employee Information** and find the employee that you will be adding or changing tax information for and click on the “Employee Information” icon
- Click on the “Payroll” tab at the top, and then go to the Tax section
- Click on the + sign on the right and a new row will appear and that is where you can make the update
  - Note: by clicking on the + sign when changing the employee’s tax keeps a history of the tax settings.

## Accruals

Accruals 

[Edit Accrual Balances](#)

		TIME OFF	ACCRUED TO	CURRENT ACCRUED	TAKEN	CURRENT BALANCE	SCH	PENDING APPROVAL
<input type="checkbox"/>		 Personal	01/01/2020	Hrs: 2.72	0.00	2.72	0.00	0.00
01/01/2019 - 01/01/2020								
<input type="checkbox"/>		 Sick	01/01/2020	Hrs: 8.15	0.00	8.15	0.00	0.00
01/01/2019 - 01/01/2020								
<input type="checkbox"/>		 Vacation	11/27/2019	Hrs: 5.79	0.00	5.79	0.00	0.00
01/01/2019 - 01/01/2020								

- To check the employee’s accrual balance, you will go to the “Main” tab and go to the Accruals section. This is where you will be able to see the current balance and how much the employee has taken.

## Employee Requests/Login Issues

### Unlocking/Reset Employee's Password Account

- If an employee's account is locked, there are two options that you can use to unlock them:

- 1. Go to **My Team > HR > Employee Maintenance > Password Reset/Unlock**
  - Type in the employee's name

#### Password Reset/Unlock

Employees \*

- Click on "Unlock" which is on the top right on the corner



- The employee is now unlocked!

- 2. Go to on **My Team > Employee Information** and find the employee that you want to unlock

- In the Account Information, there is a checkbox that will be checked off indicating that the employee's account is locked

User Must Change Password At Next Logon   
Locked

- Uncheck off the box and hit "Save". The employee's account should be unlocked.

User Must Change Password At Next Logon   
Locked

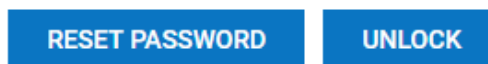
- If an employee needs to have their Account password reset:

- Go to **My Team > HR > Employee Maintenance > Password Reset/Unlock**
  - Type in the employee's name

#### Password Reset/Unlock

Employees \*

- Click on "Reset Password" which is on the top right corner



- The employee's password will be reset to the last four digits of their social
  - Note: be sure to have the correct social in the system!

## Clearing Virtual Code Settings

- If an employee wants to change their phone number or email when receiving their Virtual Code:
  - Go to **My Team > Employee Information** and find the employee that wants to change
  - Go to the “Main” tab and go to the **Two-Factor Authentication** section

### Two-Factor Authentication



- Select “Clear Virtual Code Settings” – the employee will have the opportunity to change their number and email the next time they login
  - **Note:** updating an employee’s phone number or email on their profile does not change the virtual code settings
- Changes in Virtual Code Settings must be approved within 72 hours to prevent the employee’s account from being locked. To do so, please login and select the Bell Icon which is on the top right.
    - Any pending virtual code changes can be approved here



# Processing Payroll

## Processing Payroll:

- Go to **My Team > Payroll > Process Payroll**

< Page 1 of 1 > 1 - 4 of 4 Rows Saved: [ System ]

					Payroll Name	# Batches	Payroll Type	Is Billable	Pay Date	Payroll Status	
<input type="checkbox"/>						Bi-Weekly Regular 11/25/2019	2	Regular	Y	11/25/2019	Open
<input type="checkbox"/>						Bi-Weekly Regular 11/08/2019	2	Regular	Y	11/08/2019	Open
<input type="checkbox"/>						Bi-Weekly Regular 10/28/2019	2	Regular	Y	10/28/2019	Open
<input type="checkbox"/>						Bi-Weekly Regular 10/11/2019	2	Regular	Y	10/11/2019	Open
Report Total							8				

- Click the , this will take you to the Payroll Prep Process which serves as the payroll dashboard

## Initiate Payroll

- First, click **“Initiate Payroll”** and a popup will appear (refer to the image to the bottom)
  - Make sure the box is Checked for **“All On Assigned Pay Period”** and also the correct Pay Statement Type is selected
  - If you want to add a pay stub note for *all* employees, you can enter in the Pay Stub Note field
  - Then you will click **“Create Now”**

### Initiate Payroll

Do You Want To Initiate Payroll?

#### OPTIONS

Create	Type	PST Type
<input checked="" type="checkbox"/>	All On Assigned Pay Period	Regular
<input type="checkbox"/>	All Active	
<input type="checkbox"/>	All w/PSTs This Quarter	

#### EXTRA FILTERS

No Filters Defined

ADD FILTER

Block Base Comp.

Pay Stub Note

Process

Cancel

Skip

Create Now

## □ Add/Edit Batches

- Next, click on “Add/Edit Batches”

□					↑ Name	Type
□					20190301 bonus sa	bonus
□					Regular Earnings	Regular Earnings

Para Total

- Click on the First Icon to the left of the “Regular Earnings” batch and this will take you into the batch where you can enter in the employee’s hours, commission, bonus, etc.

□													
	Employee Id	First Name	Last Name	PS Type	Type	Bank Unpaid \$ E	Bank Unpaid Hourly Rate \$ E	Bonus (Supplemental Tax Rate) \$ E	Bonus (Supplemental Tax Rate) Hourly Rate \$ E	Call PS \$ E			
	starts with	starts with	starts with										
	00115	Billy	Horschel	Regular	Master								
	00116	Smylie	Kaufman	Regular	Master								
	00117	Frank	Underwood	Regular	Master								
	00118	Bubba	Watson	Regular	Master								
	00119	Matt	Kuchar	Regular	Master								
	00120	Rory	McElroy	Regular	Master								
	100	Kathy	Watts	Regular	Master								

- **Note:** You can edit your Batch setup by going to “Select Columns” and pulling in the columns that you need. Be sure to save your settings as well. If you need any help with this, you can reach out to your Account Manager.
- You can Save while you are inputting the employee’s information, so you will not lose your work.
- After you are completely done entering in the employees’ payroll information, **click “Save & Update” then click “Close Batch”**
  - Be sure to do this step! This is crucial because this step will update the payroll and pull the amounts into the pay statements.



- After you clicked “Close Batch”, click on the Back button and press it again once more so it will take you back to the Payroll Prep Dashboard

### ← Payroll Batches

Payroll: Bi-Weekly Regular 10/11/2019

	Success (1)	<a href="#">Hide All</a>
	Closed.	



[Add/Edit Pay Statements](#)

- Next, “**View/Add Pay Statements**” is optional
  - If you want to view the employees’ pay statement individually, you can view it from this section. It shows a preview of the breakdown of the employees’ earnings, deductions, and taxes.

[Sign-Off Open Alerts](#)

 There are 1 unresolved payroll alert(s).

- **Payroll Alerts:** Payroll alerts are able to be created within the employee’s profile to set an alert within payroll as a reminder for a change or check to be made on that employee
  - For example: an employee received a pay increase in the middle of the pay period and you want to verify that it is correctly updated within payroll - you can create a payroll alert to remind you to double check the pay increase when you are processing payroll.

[Pre Process Payroll \(Close Payroll\)](#)

- Next, click “**Close Payroll**”
  - Note: This option only **closes** the payroll but **does not submit** it
  - You can always click to “Re-Open” the payroll if you have any additional changes to make before submitting payroll

[View Payroll](#)

- **Please review payroll reports before submitting!!**
- You can use the Payroll Register by PST report to review payroll. This report will show you the breakdown of each employee’s pay statement for the pay period: how much the employee is earning, what deductions are being taken out, what taxes are being taken out, and the employee’s net pay.
- You can also use the Payroll Recap & Funding. This reports shows the overall total of the payroll.

[Submit Payroll](#)

- Once you have reviewed payroll, you will click “Submit” – this is when payroll has been submitted to the system and will notify your Account Manager that payroll is ready to be processed.


**Additional Batch Functions:**

● **Add Employee to Batch:**

- If you do not see an employee in the batch (which can happen if you added the employee in the system after the batch was opened), click **ADD ROWS** and a new pop-up will open.

**Add Rows**

Please select employee and pay statement type.

Employees\* One  

# Rows\* 1

Pay Statement Type\* Regular

- Click on the Blue People Icon and a list of all your employees will show. Here you will choose the employee you want to select. Then click to add their pay statement to the batch.
- You can enter the employee’s pay information. If it’s a salaried employee, click “Save & Update” and the system will bring in the salary without manually adding it in.

● **Delete Employee from Batch:**

- If you do not want an employee to get a check this payroll, simply leave all fields blank (or delete the amount if it’s pre-filled). Alternatively, you may click on the X left of the employee’s name to delete the employee from the batch.



● **Employee General changes:**

- To do the following general changes:
  - Block auto deductions
  - Change hourly rate for this one payroll
  - Add a one-time miscellaneous deduction
  - Block income tax
  - Add an earning not available as a column
  - Change department
- To the left of the employee’s name, click on the “Edit Record” icon, there are four tabs by Category, find the appropriate tab that applies to you and make the changes
  - **Note:** changes performed under this section are not permanent!



- **Stop direct deposit for this check only:** on the left side of the batch click on the blue icon (when you hover over it with the mouse it will say “edit pay statement”), at the bottom click on utilities > options > under direct deposit you will see the account number and the amount, change the amount next to direct deposit to 0 and it will be converted to check. You may also change the amount as you desire and the remaining will be paid via check. Click apply changes > on the next screen click save > then click Previous screen which will take you back to the batch.
- **Change Pay Period for 1 Employee:** Follow the step above, in the same screen see on the right side pay period from and to, those dates can be changed and will show up on the paystub as modified.
- **Add paystub note for 1 employee:** Follow the step above, in the same screen at the bottom there’s a Pay Stub Note.
- **Add another line to an employee:** click the plus sign next to the employee, this will then add another line for that employee, and you can then enter additional hours in dollar figures. (This is mostly used when you want to pay an employee with a different hourly rate than standard).
- **Add a second check for an employee:** Click the plus sign next to the employee, and under PS type you will see the option “regular”. Change it to “Check # 2”, enter the hours or dollar amount, and this new line will be printed on a separate check.

## Manual Check:

*If you ever have to print a check on your end between 1 payroll and the next, it can be recorded as follows:*

- Go to **My Team > Payroll > Process Payroll**; click onto your next scheduled payroll
- Click into  **Add/Edit Pay Statements** and click “**New Pay Statement**”. Choose the employee and under Pay Statement Type, choose “Manual” and click Ok.

New Employee Pay Statement

---

Add For

Single Employee ▾

Employee

Test Employee ▾

+

Pay Statement Type

Manual ▾

Cancel




OK

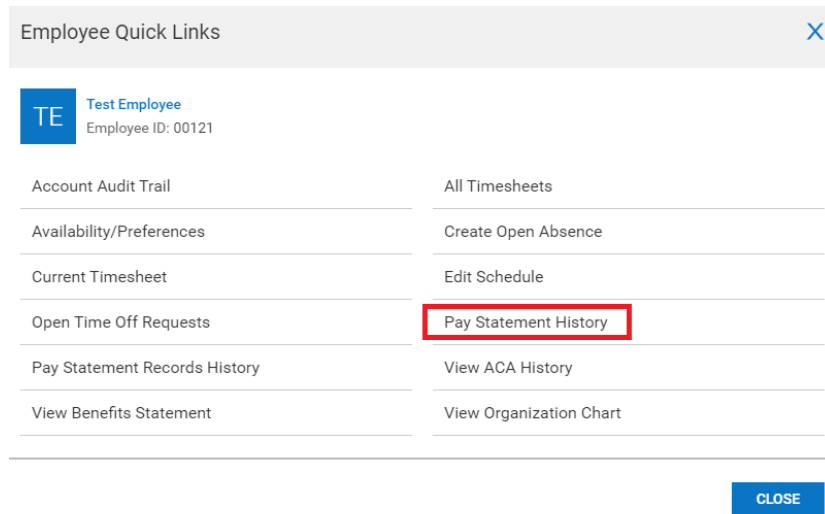
- Enter in the amount the employee needs to be paid for (Regular, Salary, Overtime, etc.) and click “Save”
  - To change the pay period that the employee will see on the pay stub, click on the “Utilities” and click “Options”. In the Defaults section (the 3<sup>rd</sup> column), you will see the Pay Period field – this is where you can manually change the pay period
  - Note: By default, the pay period showing on the pay stub will be based on the current payroll.
  - Click on “Apply Changes” to save the changes you just made.

- Click “Utilities” again and select “Close Pay Statement”
- Click the Back button then click on the checkbox of the Manual Pay Statement and Select **Utilities > Deliver Selected Pay Statement > then choose your email name (if you don’t see your name then use “email reports” which will go to the same email that the reports are being delivered to with payroll)**; uncheck the Box “Add Non-Negotiable” then click Ok.
  - Note: if you make multiple manual checks, then check the box for each at the same time for email delivery
  - You will receive an email immediately with the manual check ready for printing. (For security reasons, the system would not let you print the check directly from the system - only a pre-designated email)

# Reports

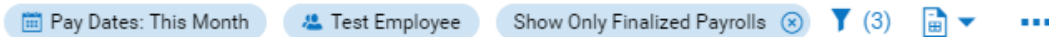
## Employee Pay History:

- To view an employee’s pay history, go to Click on **My Team > Employee Information** and find the employee’s name.
- Click on the “Quick Links” icon that is to the left of the employee’s name    and a pop-up will appear and click “Pay Statement History”

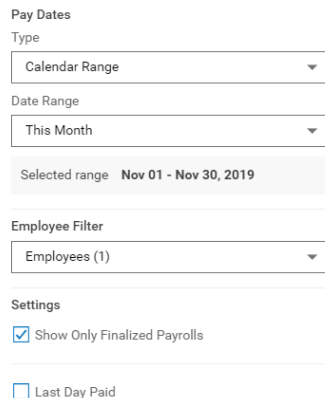


Employee Quick Links	
Account Audit Trail	All Timesheets
Availability/Preferences	Create Open Absence
Current Timesheet	Edit Schedule
Open Time Off Requests	<b>Pay Statement History</b>
Pay Statement Records History	View ACA History
View Benefits Statement	View Organization Chart

- You can change the **Date Filter** to show the dates that you want to view



- On the top right, you will see “Pay Dates” that you can click on. From here you are able to change the Date filters to your view that you want



Pay Dates

Type  
Calendar Range

Date Range  
This Month


Selected range Nov 01 - Nov 30, 2019


Employee Filter  
Employees (1)

Settings

Show Only Finalized Payrolls

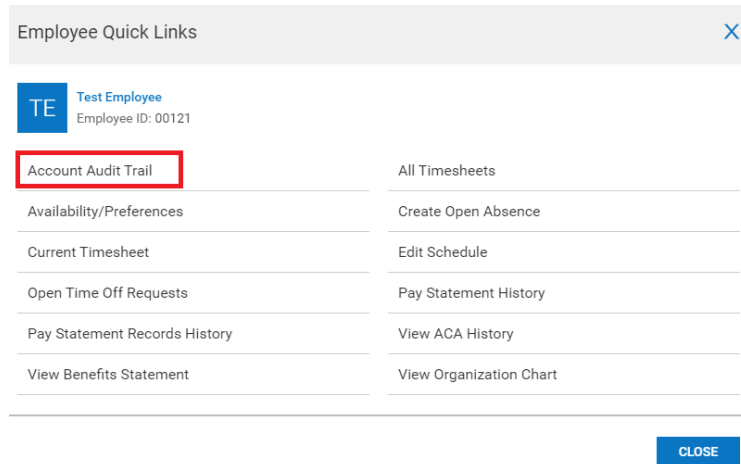
Last Day Paid

- You can change the filter based on the Type and Date Range
- To print the report, click on the 3 Dot Button  and click “Export”
  - You can then export it to any of the available formats

- If you want to re-print a pay stub for an employee, you can click on the pay statement icon  next to the desired pay stub. This will bring up the actual check image and click “Download PDF” where you can then email or print the pay stub.


### Account Audit Trail:

- To view a track record of changes made to an employee (address, earnings, deductions, etc.) select the employee and click on Quick Links and click on “Account Audit Trail”



- By default the report is set for “Today”. You can change to any given date range to see changes made during that period. The report will show the old and new value as well as the user who made the change.

### Employee List:

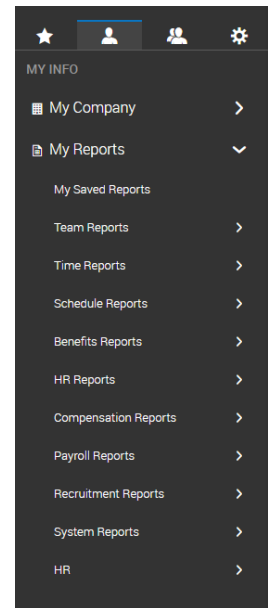
- To print/export an employee list, go **My Team > Employee Information**
- If you need to remove or add additional columns see the instructions below under “[Reports Customization](#)” on how to add/remove columns
- Once you have your Employee List to your liking, you would Export your report
- Click on the 3 Dot Button  and click “Export”
  - You can then export it to any of the available formats
- To print an employee “Per Page” report, check the checkbox above all employees , this will select all employees or you may check the box next to the employees you would like to print.
  - Click on the 3 Dot Button that is next to the View Button and click “Download PDF”



- You then have the option to uncheck information you would like to exclude from the report and click “Download PDF”

## General Reports:

To create reports, you will go to **My Info > My Reports**. From this view, you have different reports that is provided with numerous of options to obtain specific information about your company or employees.



## Reports Customization

Every screen in our system is designed as a report that can be customized as follows:

- Bring in additional columns
- Remove columns you don't need
- Re-sort the column order
- Rename column headings
- Save screen layout(s)
- Grouped by columns
- Filtered to only show a certain field, like Dept: Office
- Export to Excel, PDF, CSV, HTML, Text, XML


### Bring in Additional Columns:

- You can add in additional column currently not listed like employee's social security, address, city, etc.
- You will click on the Click on the 3 Dot Button and click **"Add/Remove Columns"**

The screenshot shows a dialog box titled "Add/Remove Columns" with a close button (X) in the top right corner. Below the title is a search bar labeled "Search Available and Current Columns" with a magnifying glass icon. The dialog is divided into two columns: "Available Columns" on the left and "Current Columns" on the right. Each column contains a list of items with checkboxes. The "Available Columns" list includes: Button: Employee Quick Links, Button: View/Edit Availability/Preferences, Button: View/Edit Employee, Company: Address 1, Company: Address 2, Company: City, Company: Company Registration # (GB), Company: DBA Name, Company: DUNS, and Company: Fax. The "Current Columns" list includes: LD: Pneumatic & Hydraulic Name, LD: Total Energy Solutions Name, LD: States Name, LD: Shift Name, LD: Total Earning, LD: Total Gross, LD: Total Deductions (EE), LD: Total Deductions (ER), LD: Total Taxes (EE), and LD: Total Taxes (ER). Below the lists are "ADD" and "REMOVE" buttons, along with up and down arrow buttons. At the bottom of the dialog are "MANAGE CUSTOM COLUMNS", "CANCEL", and "APPLY" buttons. Below the dialog, there is a toolbar with several icons: a calendar icon, a filter icon, a funnel icon with "(2)", a document icon, and a three-dot menu icon which is circled in red.

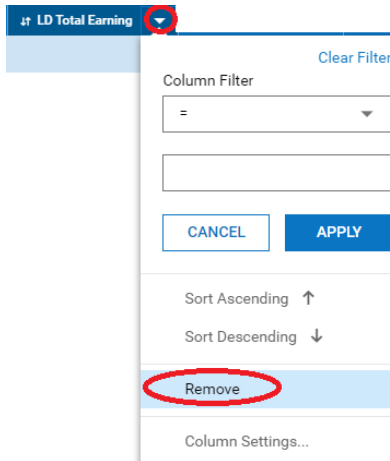
- The left side shows **columns available** to bring in; the right side shows **current columns** in the report
- Above the column is a Search Box where you can type a few letters of a column you are looking for and the system will narrow down the column list



- For example: if you want to bring in an employee’s address, you can type “Add” and the system will narrow the list to all columns that include “add” in them. This will help you narrow the list to easily find columns.
- Once you see the column you want, click on the checkbox  and click **ADD**. This will move the column from the left (available columns) to the right (current columns).
- You are able to adjust the order of your columns by selecting the column you want to move and then clicking the up or down button. 
- Click Apply and the report will update with the new columns/order.

### Remove Columns you don’t Need:

- If there are some columns in the report that you don’t need, you can remove them by clicking on the downwards arrow next to the heading of the column and click “Remove”



- Or you can go back to the Add/Remove columns and select the column that you want to remove and click **REMOVE**

### Rename Column Headings:

- You will click on the 3 Dot Button and click “**Export Settings**” and click on the “Columns to Export” tab. You are able to rename the columns headers from here & click apply.

<input checked="" type="checkbox"/>	Columns In Report	Custom Label	Characters Limit	Padding
<input checked="" type="checkbox"/>	LD: Pneumatic & Hydraulic Name	<input type="text"/>	<input type="text"/>	Space
<input checked="" type="checkbox"/>	LD: Total Energy Solutions Name	<input type="text"/>	<input type="text"/>	Space
<input checked="" type="checkbox"/>	LD: States Name	<input type="text"/>	<input type="text"/>	Space
<input checked="" type="checkbox"/>	LD: Shift Name	<input type="text"/>	<input type="text"/>	Space
<input checked="" type="checkbox"/>	LD Total Earning	<input type="text"/>	<input type="text"/>	Space
<input checked="" type="checkbox"/>	LD Total Gross	<input type="text"/>	<input type="text"/>	Space
<input checked="" type="checkbox"/>	LD Total Deductions (EE)	<input type="text"/>	<input type="text"/>	Space
<input checked="" type="checkbox"/>	LD Total Deductions (ER)	<input type="text"/>	<input type="text"/>	Space

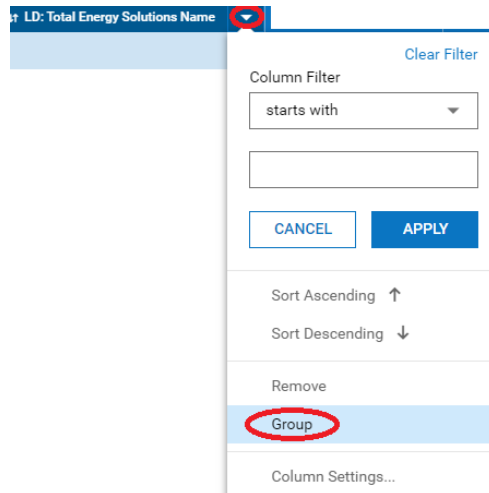
### Save Screen Reports(s):

- Once you have added, deleted, or renamed any columns to your liking – you can save your Report by clicking the 3 Dot Button and click **“Save Report As”**

- You can save the report to the name that it pertains to. You can also make this report your default report
  - For example: you’ve adjusted the report on how you see employees when you view **Employee Information** – the report that you’ve created and saved will show as the default when you login and go to that page Employee Information page.
- Remember to click **Save & Run!**

### Grouped by columns:

- Your report may reflect specific information if you select to group the columns. Select the downward arrow on the column you want to group and click **“Group”**. Selecting group on any given column groups them together and provides a more narrow report.



### Filtered to only show a certain field, like Dept: Office:

To find information at a faster pace take advantage of our available filter option. Each Column has a search field where you can locate information faster.

- For Example: you are looking for a specific check and you have a list that reflects 1000 checks, simplify your search by typing in the check # into the search column.

Symbol	Definition	Example
=	Entry is exactly this	The entry equals 03/30/06
! =	Entry is not this	The entry does not equal 03/30/06
<b>starts with</b>	Entry starts with	Entry starts with abc
<b>not starts with</b>	Entry does not start with	Entry does not start with abc
<b>Like</b>	Entry is like	Entry contains abc
<b>not like</b>	Entry is not like	Entry does not contain abc
<	Entries are less than	The entry is before 03/30/06
>	Entries are greater than	The entry is after 03/30/06
<=	Entries are not less than	The entry is before or on 03/30/06
>=	Entries are not greater than	The entry is on or after 03/30/06
<b>is null</b>	Entries that are blank	The entry is blank
<b>is not null</b>	Entries that are not blank	The entry has been filled in
<b>In</b>	Entries that include	The entry includes 03/30/06
<b>not in</b>	Entries that do not include	The entry does not include 03/30/06

**Export to Excel, PDF, CSV, HTML, Text, XML:**

- Once you have completed the process of selecting the needed columns and you are ready to run your report. Go to the 3 Dot Button and click “**Export**”. You will then see all the previously mentioned formats available for you.