

Create Employee Info from Template

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Synopsis:

With the 'Create Employee Info from Template' feature, you can leverage pre-designed payroll division templates to auto populate Deduction, PTO and HR Tracking information for all employees or unique employees that are already assigned to the 'Payroll Division'.

This feature is useful when you are attempting to update Deductions, PTO or HR Tracking Information for a large number of employees simultaneously.

This manual assumes you have already made adjustments to the 'Payroll Division Templates' and you are now going to apply those template changes to employees assigned to the respective Payroll Divisions. If you need to learn how to adjust or create 'Payroll Division Templates', please refer to the 'Payroll Division Templates' manual in the 'Setup Groups' section.

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[Access and Utilize the 'Create Employee Deductions'](#)

- Click on 'Create Emp. Info. From Template' and then click 'Create Employee Deductions' in the 'Periodic Activities' column



Full Payroll Menu

Payroll Processing	Reports	History	Periodic Activities	Setup	Setup Groups	Posting Setup
Payroll Employees	Payroll Report	Posted Payroll	Periodic Processing..	Payroll Setup	Additional Setups..	Employee Posting Groups
Payroll Processing	US Tax Reports..	Payroll Ledger Entries	Financial Periodic Activities..	Payroll Codes	HR Setup..	Earnings
Batch Payroll Processing	Payroll Financial Reports..	Payroll Statistics	ACA Compliance..	Pay Cycles..	Report Setup..	Withholdings / Deductions
Payroll Applicants	Payroll Employee Info..	Posted Batch List	Web Portal Documents..	Payroll Calc. Formulas	Process Procedures..	Employer Taxes
Payroll Journal	HR Reports..	PTO Ledger Entries	Create Emp. Info. from Template..	Earnings Rates	Payroll Division Templates..	Employer Contributions
PTO Management..	Field Select. Reports..	Hours Detail Entries	Create Employee Deductions	Payroll Tax Setup	Applicant Setup..	Reimbursements
Enter Hours / Quantity..	Time / PTO Reports..	Approved PTO Hours	Create Employee PTO Setup	Customer Payroll Tax Setup	Position and Union Setup..	Payment Advances
Emp. Change Req./Approve..	Labor Costing Information..	Other Ledgers..	Create Employee HR Tracking	State Tax IDs	Labor Cost Setups..	Payments
			Create Resource from Payroll Employee			

- The 'Create Employee Deduction' screen will open. Select the 'Payroll Division'

CREATE EMPLOYEE DEDUCTION

Options

Payroll Division Code: ▼

Deduction Template Code: ▼

Update All Employees: → ADMIN Administration

WAREHOUSE Warehouse

Filter: Payroll Employee + New Select from full list

× No.: ▼

+ Filter...

Filter totals by:

+ Filter...

Schedule... OK Cancel

Employee Posting Groups

Employer Contributions

Reimbursements

Payment Advances

Payments

- Select a 'Deduction Template Code' if applicable
- Set 'Update All Employees' to True if you wish to apply this template to all employees assigned to this Payroll Division Code
- If 'Update all Employees' is set to false (as shown below), you will need to select a Payroll Employee to apply the Template adjustments
- Click 'OK' when finished.

NOTE: Any employees not assigned to a Payroll Division will have template settings applied to their Deductions, PTO or HR Tracking Information if 'Update All Employees' is set to true or if an individual employee is selected. If an employee is not assigned to a payroll division, multiple Payroll Division templates can be applied to the same employee which can lead to unintended Deduction / PTO settings being applied to the same employee.

CREATE EMPLOYEE DEDUCTION

Options

Payroll Division Code ADMIN

Deduction Template Code

Update All Employees ☒

Filter: Payroll Employee

x No. TEST-EMP-AZ

+ Filter...

Filter totals by:

+ Filter...

Schedule...

OK

Cancel

Access and Utilize the 'Create Employee PTO Setup'

- Click on 'Create Emp. Info. From Template' and then click 'Create Employee PTO Setup' in the 'Periodic Activities' column

Full Payroll Menu						
Payroll Processing	Reports	History	Periodic Activities	Setup	Setup Groups	Posting Setup
Payroll Employees	Payroll Report	Posted Payroll	Periodic Processing..	Payroll Setup	Additional Setups..	Employee Posting Groups
Payroll Processing	US Tax Reports..	Payroll Ledger Entries	Financial Periodic Activities..	Payroll Codes	HR Setup..	Earnings
Batch Payroll Processing	Payroll Financial Reports..	Payroll Statistics	ACA Compliance..	Pay Cycles..	Report Setup..	Withholdings / Deductions
Payroll Applicants	Payroll Employee Info..	Posted Batch List	Web Portal Documents..	Payroll Calc. Formulas	Process Procedures..	Employer Taxes
Payroll Journal	HR Reports..	PTO Ledger Entries	Create Emp. Info. from Template..	Earnings Rates	Payroll Division Templates..	Employer Contributions
PTO Management..	Field Select. Reports..	Hours Detail Entries	Create Employee Deductions	Payroll Tax Setup	Applicant Setup..	Reimbursements
Enter Hours / Quantity..	Time / PTO Reports..	Approved PTO Hours	Create Employee PTO Setup	Customer Payroll Tax Setup	Position and Union Setup..	Payment Advances
Emp. Change Req./Approve..	Labor Costing Information..	Other Ledgers..	Create Employee HR Tracking	State Tax IDs	Labor Cost Setups..	Payments
			Create Resource from Payroll Employee			

- The 'Create Employee PTO' screen will open
- Select a 'Payroll Division Code'
- Set 'Update all Employees' to True if necessary
- Or Select an individual employee and click 'OK'

CREATE EMPLOYEE PTO 

Options

Payroll Division Code ADMIN 

Update All Employees 

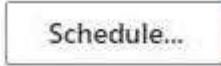
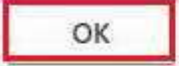
Filter: Payroll Employee

× No. 

+ Filter...

Filter totals by:

+ Filter...

Access and Utilize 'Create Employee HR Tracking'

- Click on 'Create Emp. Info. From Template' and then click 'Create Employee HR Tracking' in the 'Periodic Activities' column

Full Payroll Menu

Payroll Processing	Reports	History	Periodic Activities	Setup	Setup Groups	Posting Setup
Payroll Employees	Payroll Report	Posted Payroll	Periodic Processing..	Payroll Setup	Additional Setups..	Employee Posting Groups
Payroll Processing	US Tax Reports..	Payroll Ledger Entries	Financial Periodic Activities..	Payroll Codes	HR Setup..	Earnings
Batch Payroll Processing	Payroll Financial Reports..	Payroll Statistics	ACA Compliance..	Pay Cycles..	Report Setup..	Withholdings / Deductions
Payroll Applicants	Payroll Employee Info..	Posted Batch List	Web Portal Documents..	Payroll Calc. Formulas	Process Procedures..	Employer Taxes
Payroll Journal	HR Reports..	PTO Ledger Entries	Create Emp. Info. from Template..	Earnings Rates	Payroll Division Templates..	Employer Contributions
PTO Management..	Field Select. Reports..	Hours Detail Entries	Create Employee Deductions	Payroll Tax Setup	Applicant Setup..	Reimbursements
Enter Hours / Quantity..	Time / PTO Reports..	Approved PTO Hours	Create Employee PTO Setup	Customer Payroll Tax Setup	Position and Union Setup..	Payment Advances
Emp. Change Req./Approve..	Labor Costing Information..	Other Ledgers..	Create Employee HR Tracking	State Tax IDs	Labor Cost Setups..	Payments
			Create Resource from Payroll Employee			

- The 'Create HR Emp. Tracking' screen will open
- Select a 'Payroll Division Code'
- Set 'Update all Employees' to True if necessary
- Or Select an individual employee and click 'OK'

CREATE HR EMP. TRACKING

Options

Payroll Division Code

ADMIN

Update All Employees

☒

Filter: Payroll Employee

× No.

TEST-EMP-AL

+ Filter...

Filter totals by:

+ Filter...

Schedule...

OK

Cancel