

HR Setup

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Synopsis:

This manual walks you through HR Setup Section of the Full Payroll Menu.

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ACCESS HR SETUP

- Full Payroll Menu
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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..	Payroll Divisions	Holdings / Actions
Payroll Applicants	Payroll Employee Info..	Posted Batch List	Web Portal Documents..	Payroll Calc. Formulas	Emp. Info Change Setup	Employer Taxes
Payroll Journal	HR Reports..	PTO Ledger Entries	Create Emp. Info. from Template..	Earnings Rates	HR Tracking Codes	Employer Contributions
PTO Management..	Field Select. Reports..	Hours Detail Entries	Time Transfer Reports..	Payroll Tax Setup	Benefit Setup	Reimbursements
Enter Hours / Quantity..	Time / PTO Reports..	Approved PTO Hours	Labor Cost Updates..	Customer Payroll Tax Setup	Benefit Categories	Benefits
Emp. Change Req./Approve..	Labor Costing Information..	Other Ledgers..	Automatic Data Migration..	State Tax IDs	Benefit Status Codes	Benefits
					Benefit Rate Details	
					Security Group Codes	
					Security Group User ID Setup	
					Certification Setup	
					Qualification Setup	
					Position Qualifications	
					EEO Codes	
					Ethnicity List	

PAYROLL DIVISIONS

This is where you can create Payroll Divisions. Payroll Divisions can then be used for reporting purposes as well as tied to templates for auto populating Salary, Deduction and PTO setups.

To add a new Payroll Division:

- Enter a Code
- Enter a Description
- Check off 'Sync Employees with Resources' if you want any employee with this payroll division code to be synced with a resource.
- Select a 'Payroll Check Layout' if applicable

← PAYROLL DIVISIONS | WORK DATE: 10/10/2019 ✓ SAVED

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Code ↑	Description	Sync. Employees with Resources	Payroll Check Layout
→ ADMIN	Administration	☐	LAYOUT 1
WAREHOUSE	Warehouse	☐	
		☐	

EMPLOYEE INFO CHANGE SETUP

This area allows you to pick what fields are available for the employee to change in the web portal.

- Select a Table ID
- Select a Field ID

← EMPLOYEE CHANGE SETUP | WORK DATE: 10/10/2019 NOT SAVED

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Table ID ↑	Table Caption	Field ID ↑	Field Caption	Vali... Value	Field Value Fi
→ 14141103	Payroll Employee	48	Middle Name	☒	
				☐	

HR TRACKING CODES

This is where you can create HR Tracking Codes that will then be available selections in the 'HR Tracking Code' field of the 'HR Employee Information' section of the employee card.

- Enter a Code

- Enter a Description
- Select a 'Value Type' of Boolean, Code, Text, Decimal, Time or Date
- Select a Default Value
- Check off the 'Prevent Payroll Processing if values do not Match' box if you want to prevent payroll from processing based on certain HR Tracking Code settings not matching up.

HR Tracking Code ↑	Value Type	Default Value	Utili... Req... Value	Required Value	Prev... Payr... Pro... if
→ DRUG TEST	Boolean	No		No	

BENEFIT SETUP – please see 'Benefit Setups' section under 'HR Setups' of manual.

BENEFIT CATEGORIES– please see 'Benefit Setups' section under 'HR Setups' of manual.

BENEFIT STATUS CODES– please see 'Benefit Setups' section under 'HR Setups' of manual.

BENEFIT RATE DETAILS– please see 'Benefit Setups' section under 'HR Setups' of manual.

SECURITY GROUP CODES

This section is where you can set up Security Group Codes to apply to employees to filter which users can view this employee's information

←	SECURITY GROUP CODES WORK DATE: 10/10/2019		✓ SAVED			
Code ↑	Description					
→ GROUP A-D	Security Group Employee Badge A - D					

SECURITY GROUP USER ID SETUP

This is where you assign Payroll Now user id's to the Security Group Codes. If an employee has a Security Group Code applied to the Employee Card, only User ID's with the Security Group assigned to them in this section will be able to view employee information

- Select a User ID
- Select a Security Group Code

← SECURITY GROUP USER ID SETUP | WORK DATE: 10/10/2019 ✓ SAVED

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User ID	Code	Administr...	Batch Description
→ TEST	GROUP A-D		Security Group Employee Badge A - D

CERTIFICATION SETUP

In this section, you can create 'Certification Codes' that can be selected in the 'Employee Certifications' table of the employee card

← CERTIFICATION SETUP | WORK DATE: 10/10/2019 ✓ SAVED

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Code ↑	Description	Utilize Pop-up Alerts	Pop-up Alert Date Calculation
→ VALID DL	Valid Drivers License		

QUALIFICATIONS SETUP

In this section you can create 'Payroll Qualification' codes that can be selected and applied in the 'Employee Qualifications' table of the employee card.

← PAYROLL QUALIFICATIONS | WORK DATE: 10/10/2019 ✓ SAVED

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Code ↑	Description
→ GED	GED Certification

POSITION QUALIFICATIONS

In this section you can create 'Position Qualifications' where you tie a position code to qualifications.

 POSITION QUALIFICATION LIST | WORK DATE: 10/10/2019 NOT SAVED   

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Payroll Position Code ↑	Qualification ↑	Description
→ MANAGER	GED	

EEO CODES

If you need to track EEO Codes on the Employee Card, you can set up those codes here:

 EEO CODES | WORK DATE: 10/10/2019  

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Code ↑	Description	SOC Job Code	Census Code
→			

ETHNICITY LIST

If you need to set up Ethnicity Codes to be applied to the employee card, you can set up those codes here.

 ETHNICITY LIST | WORK DATE: 10/10/2019 ✓ SAVED  

 Search  New  Edit List  Delete  Create Standard...Ethnicity Codes  Open in Excel   

Ethnicity Code ↑	Ethnicity	Reporting Code
→		

