Human Resources

Training Manual

ETMHR11

Document Number HRTRN

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This document has been prepared to conform to the current release version of TRAVERSE Accounting Business Software for Windows. Because of our extensive development efforts and our desire to further improve and enhance the product, inconsistencies may exist between the software and the documentation in some instances. Call your customer support representative if you encounter an inconsistency.

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INTRODUCTION

OVERVIEW

The Human Resources (HR) application helps you track people or businesses using data already present within TRAVERSE. You can use HR's functions to set and maintain information about your Employees, such as benefits, Payroll information, and regulatory information. You can also use the reporting tools to view Employee information such as education, skills, benefits, training, insurance status, and other information.

Human Resources can also be used to track information about 3rd party contractors and other individuals that interact with your business. This can be beneficial in managing the required training and certifications required for tasks in a variety of industries. The interaction with Payroll and System Employees is a small part of the supported functionality.

It integrates with the Employee information at the system level and optionally within the Payroll application to record and edit Employee Information.

For the Human Resources application to function properly, the ST database must be set up using the Server Manager. This database must exist regardless of whether you have Payroll installed or not. See the Administrator Guide for details on setting up the ST database.

System Information

Additional information about using the system is found in the following sources:

- The training manuals for other TRAVERSE applications
- The *Software Developer Kit*
- Online help

Customer Support

Open Systems Holdings Corp. has a strong commitment to customer service and product quality. If you need help using any Open Systems products, follow these procedures:

- Consult the user’s guide and other TRAVERSE reference materials.
- If you are a subscriber to the TRAVERSE customer support program, you can consult your customer support representative (1-800-320-3088).
- If you would like to subscribe to the TRAVERSE Customer Support Program, please call (1-800-320-3088)

ABOUT HUMAN RESOURCES

Use the Human Resources application to track information about your Employees, the jobs they do, the health insurance in which they are enrolled, their retirement plan, and all other information associated with your Employees.

Codes Maintenance

Use the Codes Maintenance to set up Labor Classes, Federal, State and Local Taxes; Earning Types, Earning Codes, Check Sorts, and Leave Codes. These codes are linked directly to the corresponding Payroll codes.

Setup and Maintenance

Use the Setup and Maintenance functions to set up Individuals, Job Titles, Processes, Positions, Review Types, Tests, Property Codes, Attributes, Health Plans, Life Insurance Plans, Leave Plans, Retirement Plans, Type Codes, and Departments.

Worksheets

Use the Worksheets functions to print worksheets that will assist you with filing your EEO-1, VETS-4212, and DOL Reports.

Reports

Use the Reports menu to produce reports for information about the individuals you have entered, and all the information that was set up with those individuals.

Periodic Processing

Use the Periodic Processing functions to activate fields in the Employee Interface Maintenance with Payroll, Update Employee information, and a one time Initialize Individuals from Payroll.

Interactive Views

Use the Interactive Views to view (not change) information that has bee set up using the Setup and Maintenance menu.

Individual Views

Use the Individual Views to view (not change) information about individuals and the information that has bee set up with them.

Master Lists

Use the Master Lists functions to produce lists of Individual Information, Labels, Health Plans, Life Insurance Plans, and Retirement Plans that you set up using the Setup and Maintenance functions for the system to use for review or verification as well as archiving a hard copy of your system’s setup.

2

SETTING UP HUMAN RESOURCES

SETUP CHECKLIST

Follow the steps in the checklist below to set up your system:

_____ Verify your current build number to see if you have all service packs installed.

_____ Plan the implementation schedule.

_____ Set up Human Resources Business Rules.

_____ Set up Earning Types.

_____ Set up Earning Codes.

_____ Set up Tax Authorities.

    ___ Federal

    ___ State

    ___ Local

_____ Set up Departments.

_____ Set up Labor Classes.

_____ Set up Job Titles

_____ Set up Processes

_____ Set up Positions

_____ Set up Review Types

_____ Set up Tests

_____ Set up Property Codes

_____ Set up Attributes

_____ Set up Health Plans

_____ Set up Life Insurance Plans

_____ Set up Leave Plans

_____ Set up Retirement Plans

_____ Set up Type Codes

_____ Set up Individuals:

___ Set up General information.

___ Set up Process information

___ Set up Salary information.

___ Set up Position information.

___ Set up Skills/Tests information.

___ Set up Degree information.

___ Set up Licenses information.

___ Set up Training information.

___ Set up Attributes information.

___ Set up FMLA information.

___ Set up Property information.

___ Set up Health Insurance information.

___ Set up Life Insurance information.

___ Set up Retirement information.

___ Set up Tax information.

___ Set up Direct Deposit information.

___ Set up Dependents information.

_____ Use the Employee Interface Maintenance function to indicate the fields that should be updated between HR and PA.

_____ Use the Initialize Individuals if you are starting the system with an existing Payroll system already in place. (Use only once)

SETUP PROCEDURES

Before you use the Human Resources system you must follow the setup procedures in this chapter. Setup procedures include such things as defining Tax Authorities, assigning codes and IDs, and setting up Individuals. Follow the setup procedures carefully, the choices you make determine how the system operates.

Gathering Information

First, gather and organize your Payroll information. You will need the following information:

- A list of Individuals and their Payroll and Human Resources records.
- A copy of your payroll Department procedures.
- Federal, State, and Local Tax publications.
- A Chart of Accounts for your business.
- A list of the “other” pay types you use (bonuses, tips, etc.).
- A list of Job Titles, Processes, Positions, Health Plans, Life Insurance Plans, Retirement Plans, Property Codes and any other information pertaining to your individual employees.

Defining the System

To set up the Human Resources system, follow these steps:

1. Use the Business Rules function (page 3-5) to define how you want the system to work.
2. Define the IDs and codes you plan to use. See **Setting Up IDs and Codes** for more information.
3. Use the Individuals function (page 3-153) to set up your employees.

Setting up IDs and Codes

IDs and codes tell the system how to identify each individual item in a file. The system uses these identifiers to organize information.

Individual ID

You must assign an ID to each of your company's Individuals. Most functions require that you specify an Individual ID. For information about defining Individuals, refer to the Individuals function (page 3-153).

Labor Classes

Labor Classes can be used to group Individuals together according to their primary job responsibilities. For information about defining Labor Classes, see the Labor Classes function (page 3-11).

Federal, State, and Local Taxes

Use the Tax Authorities Setup (page 3-15) functions to set up and maintain Tax Authorities and Tax Codes.

Earning Codes and Earning Types

Earning Codes can be assigned to Individuals to enter time tickets for wage calculation in Payroll. For information about Earning Codes, refer to the Earning Codes function (page 3-37). Earning Types are assigned to Earning Codes as a way of classifying pay. For information about Earning Types, refer to the Earning Types function (page 3-33).

Leave Codes

Leave Codes are used to define sick and vacation time accrual rates. For information about defining sick and vacation codes, refer to the Leave Codes function (page 3-51).

Type Codes

Use the Type Code (page 3-59) maintenance function to set up codes to describe such attributes as ethnicity, gender, marital status, veteran status, and other codes.

Job Titles

Job Titles (page 3-79) are used by a number of reports, including the Longevity Report. They also are fed to TRAVERSE Payroll.

The first step is to set up the job categories in the Type Codes maintenance screen on the Setup and Maintenance menu. Selecting Job Category from the Table Code drop-down list.

Processes

The Processes (page 3-83) function allows you to set up any number of new processes with checklist items and Individuals responsible for each item.

The first step is to set up the process checklist items. This is done on the Type Codes maintenance screen from Setup and Maintenance by selecting Process Checklist from the Table Code drop-down list.

Positions

The Positions (page 3-85) function and reports allow you to set up positions within your company. Positions are established within departments and work locations and are assigned to Individuals, who inherit certain Payroll and organizational data from the assignment, such as department, work location, manager, worker compensation code, job title and job category. If a supervisor leaves and a new Employee assigned to that position, there is no need to go and update all of the people under that supervisor, as it will be updated through the positions screen.

Review Types

The TRAVERSE HR application allows you the flexibility to set up a number of Review Types (page 3-99), each with their own evaluation criteria and review cycles.

Tests

Standard Tests (page 3-103) can be set up and then maintained on each Individual.

Property Codes

The Property Code (page 3-107) maintenance screen and report allow you to track company property (keys, cell phones, laptops, etc.), as they are assigned to an Individual.

Attributes

Attributes (page 3-111) are found on the Attributes tab in the Individual Maintenance (page 3-153) screen. You must first set up the Attribute Groups (page 3-61) in the Type Codes function, then you may set up the Attributes. There can be multiple Attributes for each Attribute Group.

Health Plans, Life Insurance Plans, and Retirement Plans

There are three Benefit Plan types: Life Insurance (page 3-123), Retirement Plans (page 3-135), and Health Insurance (page 3-115).

After you have set up the Benefit Type in Type Code Maintenance, there are two steps that must be followed to set up a new plan before an Employee can be enrolled:

- The company providing the plan (life insurance carrier, health insurance carrier, or retirement plan trustee) must be set up in the Type Codes function.
- The plan details (group number, deduction frequency, waiting period/minimum age, etc.) must be set up.

Leave Plans

Leave Plans (page 3-131) are used in the Positions (page 3-85) maintenance screen. Leave Plan balances are only accumulated in Payroll. TRAVERSE HR does not delete, move or update balances. Only the Leave Code is transferred to Payroll.

Suggestions for Defining IDs and Codes

When you assign IDs and codes, establish a format that makes sense for your business and use it consistently. The following suggestions may help you to establish a useful format:

- Do not use these characters in an ID or a code: | “ ' & # *. It is recommended that special characters are not used in any ID or code.
- To prevent organization problems, use zeros to make all IDs the same length. If IDs are divided into more than one part, the parts should be the same length in every ID. Do not use spaces to divide IDs into more than one part. For example, use ACE-01 and ACE-11 instead of ACE-1 and ACE-11 or ACE 01 and ACE 11.
- Use descriptive IDs. For example, WIN001 and WIN002 are more descriptive than 000001 and 000002.
- If you want to sort items by a particular attribute, name or group, put the attribute in the ID. For example, to organize employees by last name, put the first characters of each employee’s last name in the employee ID.
- Use a combination of letters and numbers that leaves room in the sequence for later additions. For example, WIN001 and WIN005 leaves room for three IDs in between.

IMPLEMENTING HUMAN RESOURCES

3

BEGINNING SETUP

Before you use the Human Resources system, follow the setup procedures outlined in Chapter 2. Setup procedures include such things as defining tax authorities, assigning codes and IDs, and setting up Individuals.

1. Use the **Business Rules** function (page 3-5) to define how you want the system to work.
2. If you do not have Payroll set up, use the **Codes Maintenance** menu to set up Labor Classes (page 3-11), Tax Authorities (page 3-15), Earning Types (page 3-33), Earning Codes (page 3-37), Check Sorts(page 3-47), and Leave Codes(page 3-51).
3. Use the **Type Code** maintenance function (page 3-59) to set up codes to describe such attributes as ethnicity, gender, marital status, veteran status, and other codes.
4. Use the remaining **Setup and Maintenance** functions to set up Job Titles, Positions, other codes and plans.
5. If you do not have Payroll set up, use the **Departments** function (page 3-143) to set up and maintain information for departments and divisions of your company.
6. Use the **Individuals** function (page 3-153) to set up and maintain Employees and all the information that goes with the Individuals.

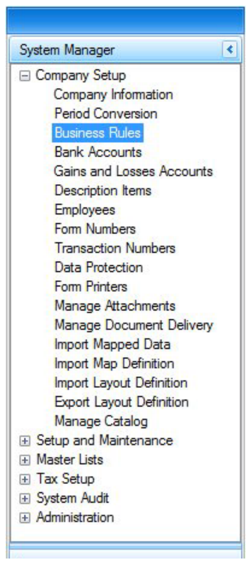
BUSINESS RULES

Use the **Business Rules** function to define application interfaces and general information about Human Resources functions. You can elect to audit Individuals, load all Individuals in setup, and set a minimum age for retirement plan eligibility.

To set up the **Business Rules**, follow these steps.

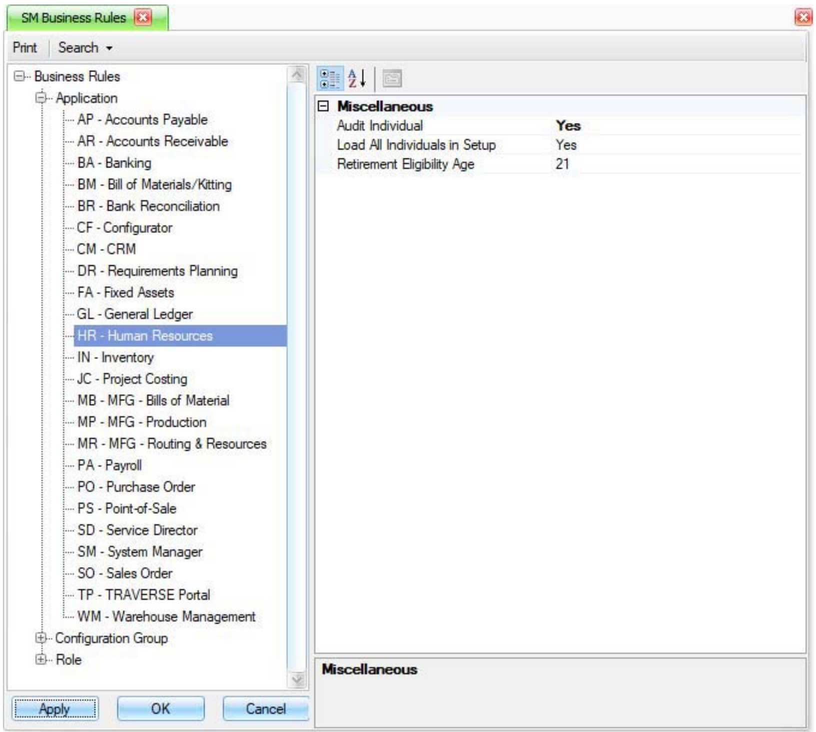
1. Select **Business Rules** from the **System Manager, Company Setup** menu.

Business Rules Menu



2. The **Business Rules** screen appears. Select HR - Human Resources.

Business Rules Screen



Miscellaneous

3. **Audit Individual**: Select **Yes** to maintain a transactional log of changes that are made to Individuals; otherwise, select **No**.

4. **Load All Individuals in Setup**: Select **Yes** to populate your Individuals setup screen with individual details and have the Next Record (navigation bar) activated. Set this rule to **No** to improve the performance of the Individual maintenance function. When you have a very large number of Individuals, this will help the screen open faster. When the rule is set to **No**, the Individuals maintenance screen will open with no data presented and the navigation bar will be disabled. The Individual lookup and auto-complete functionality in the Individual ID field remain.

5. **Retirement Eligibility Age**: Enter the minimum age your employees will be eligible to participate in your retirement plan.

6. Select a command button:

Command Buttons

Name	Description
Apply	Save the changes you have made to the business rules functions. The screen will remain open.
OK	Save the changes and exit the business rules function.
Cancel	Close the business rules screen without saving any changes.
Print	Preview and print a business rules report.
Search	Search for values or words in business rules.

Business Rules Report

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Business Rules List
Page 1

Application	Group	Description	Current Value	Default Value
HR - Human Resources				
	Miscellaneous			
		Audit Individual	Yes	-
		Load All Individuals in Setup	Yes	Yes
		Retirement Eligibility Age	21	21

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CODES MAINTENANCE MENU

If you do not have Payroll set up, use the **Codes Maintenance** menu to set up Labor Classes, Tax Authorities, Earning Types, Earning Codes, Check Sorts, and Leave Codes.

If you do have Payroll set up, the information in each function on the Codes Maintenance will be populated from the information set up in Payroll.

When information is added through either Payroll or Human Resources for the functions on the Codes Maintenance menu, both application's screens will be updated with the information.

Labor Classes

Labor Classes can be used to group Individuals together according to their primary job responsibilities. For information about defining Labor Classes, see the Labor Classes function (page 3-11).

Federal, State, and Local Taxes

Use the Tax Authorities Setup (page 3-15) functions to set up and maintain Tax Authorities and Tax Codes.

Earning Codes and Earning Types

Earning Codes can be assigned to Individuals to enter time tickets for wage calculation in Payroll. For information about Earning Codes, refer to the Earning Codes function (page 3-37). Earning Types are assigned to Earning Codes as a way of classifying pay. For information about Earning Types, refer to the Earning Types function (page 3-33).

Leave Codes

Leave Codes are used to define sick and vacation time accrual rates. For information about defining sick and vacation codes, refer to the Leave Codes function (page 3-51).

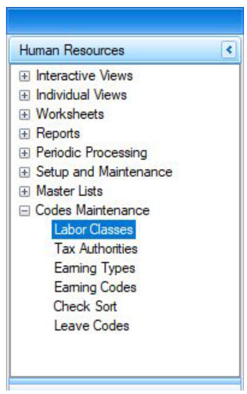
LABOR CLASSES

Use the **Labor Classes** function to set up and maintain Labor Classes, which allow you to group types of Employees together. For example, MLM could be assigned to all mid-level managers, CLK could be assigned to all clerical Employees, and so on. Employees are assigned Labor Classes on the **General** tab in the Individuals function (page 3-153), and Labor Classes can be used as a sorting tool on several Reports.

To set up **Labor Classes**, follow these steps:

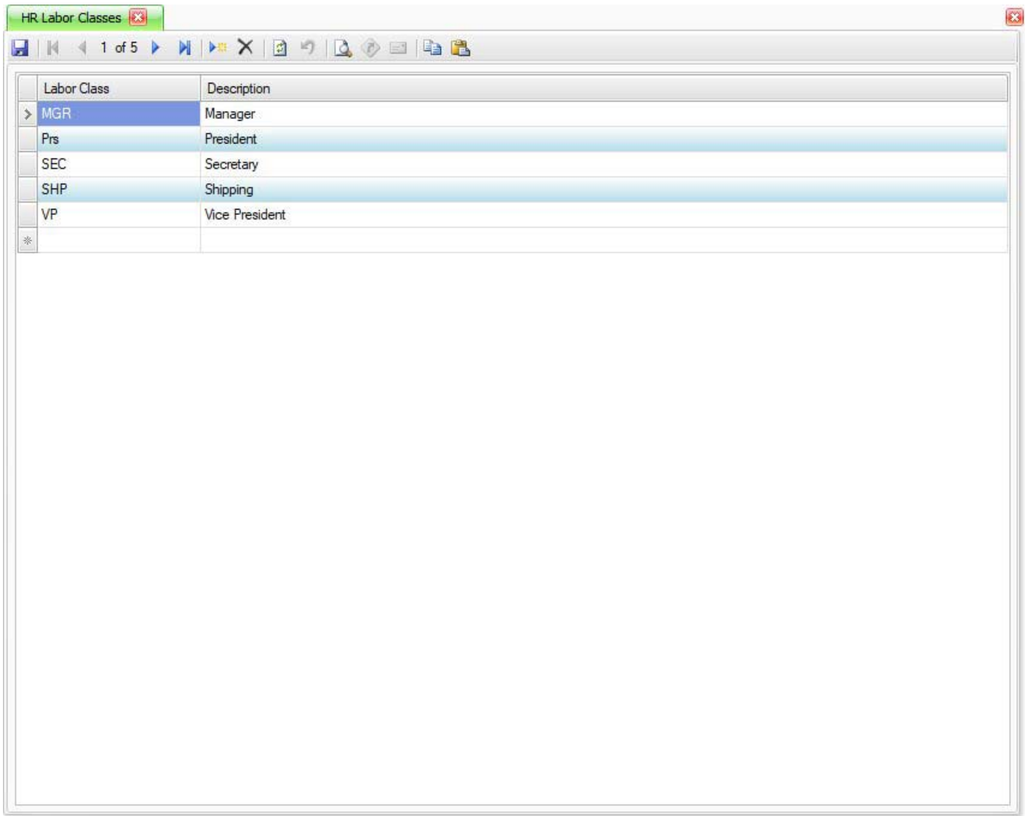
1. Select **Labor Classes** from the **Codes Maintenance** menu.

Labor Classes Menu



2. The **Labor Classes** screen appears.

Labor Classes Screen



3. Use the **Labor Classes** function to classify Individuals according to their primary job responsibilities. Examples of Labor Classes could include; ASM for assembly personnel, ADM for administrative personnel, or SPV for supervisors.
4. Enter a new **Labor Class** ID or select the Labor Class ID to work with.
5. Enter a **Description** of the Labor Class.

Task Summary

To add a Labor Class follow these steps:

1. Select the **New Record** icon  on the toolbar.
2. Enter the ID to assign the **Labor Class**.
3. Enter a **Description** of the Labor Class.

To edit a Labor Class follow these steps:

1. Select the **Labor Class** to edit.
2. Edit the **Description** of the Labor Class.

To delete a Labor Class follow these steps:

1. Select the **Labor Class** to delete.
2. Click the **Delete** button , on the toolbar, to delete the selected Labor Class.

Producing a Labor Classes List

Use the **Labor Classes List** function to produce a list of Labor Classes you set up in the Labor Classes function (page 3-11) on the Codes Maintenance menu.

To produce the **Labor Classes List**, follow these steps:

1. Select the **Print Preview** button to preview the list of Labor Classes.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Labor Classes List

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HR Labor Classes

Page 1

Labor Class	Description
MGR	Manager
Prs	President
SEC	Secretary
SHP	Shipping
VP	Vice President

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TAX AUTHORITIES

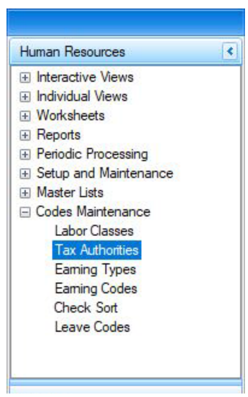
Use the **Tax Authorities** function to enter information for Employee and Employer Federal, State, and Local Tax Codes.

Tax Authorities may be set up for different countries. You may set up the codes you want to use and enter Formulas to calculate the Tax Codes. You must add the Formula ID column to your screen and select the Formula to use for each tax. You must also then set up Formula Tables and Status Codes to go with your Tax Authorities.

To work with the **Tax Authorities**, follow these steps:

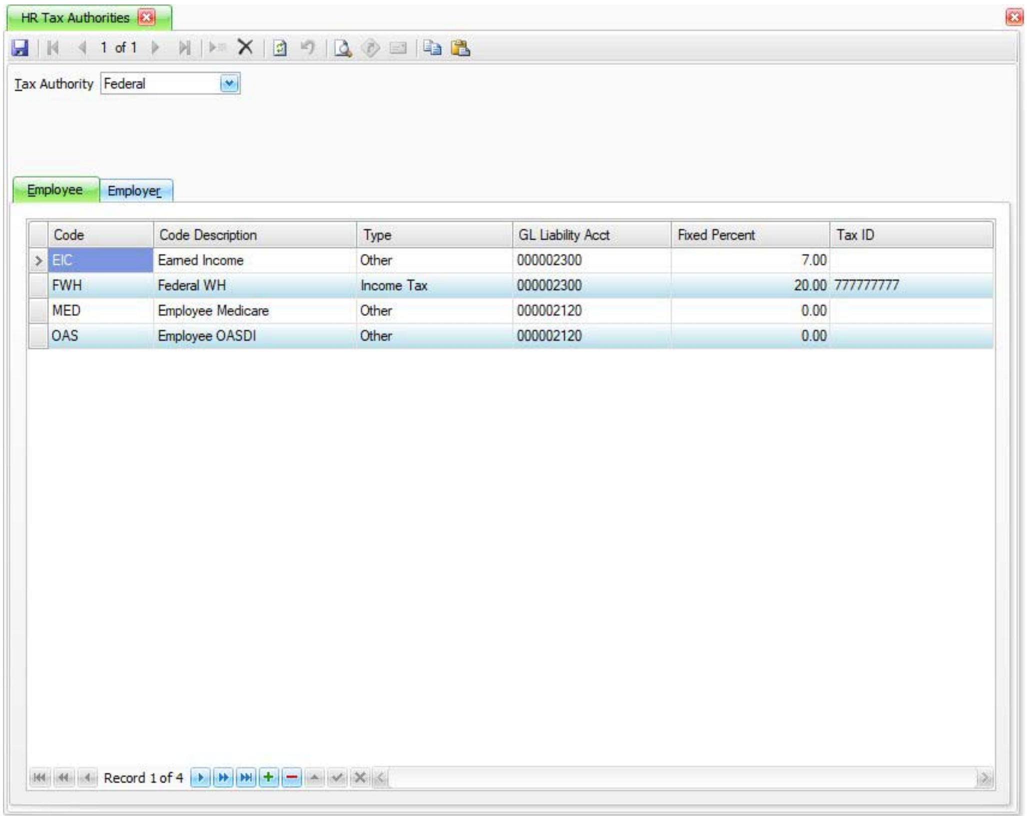
1. Select **Tax Authorities** from the **Codes Maintenance** menu.

Tax Authorities Menu



2. The **Tax Authorities** screen appears with the Employee tab displayed.

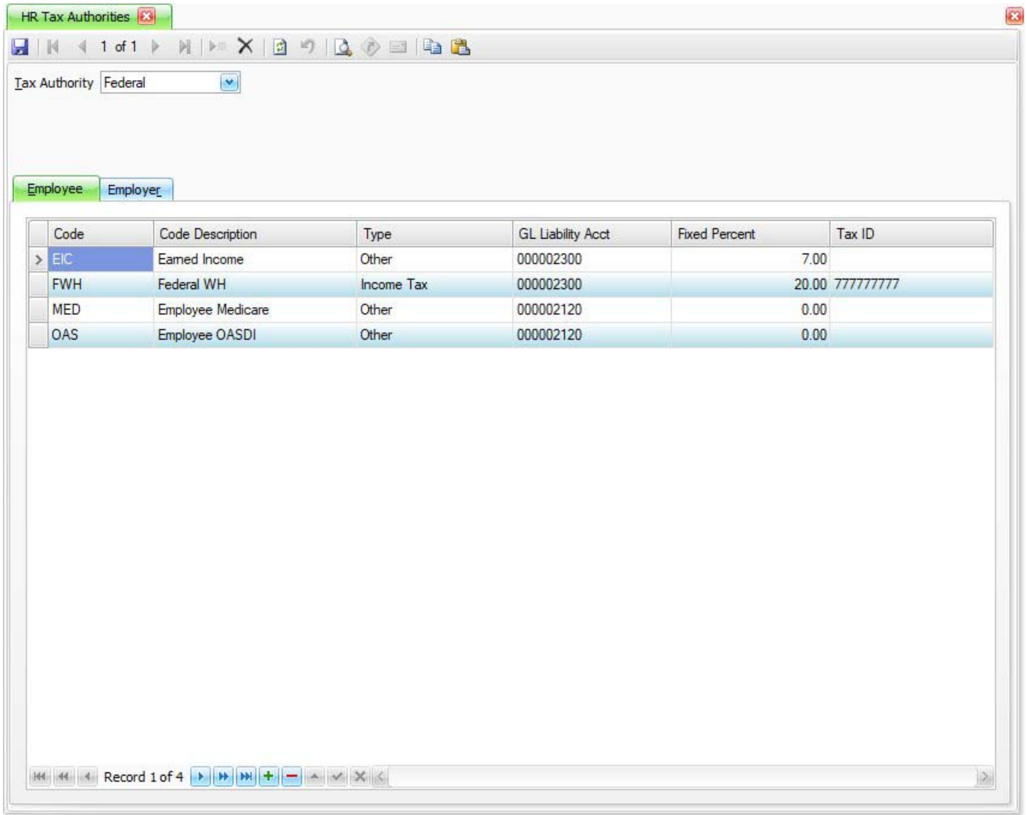
Federal Tax Setup Screen



Federal Tax Setup

Select Federal for the **Tax Authority** and the **Employee** tab to enter Federal Tax Code information for Employees. Select the **Employer** tab to enter Federal Tax Code information for the Employer.

Employee Tab

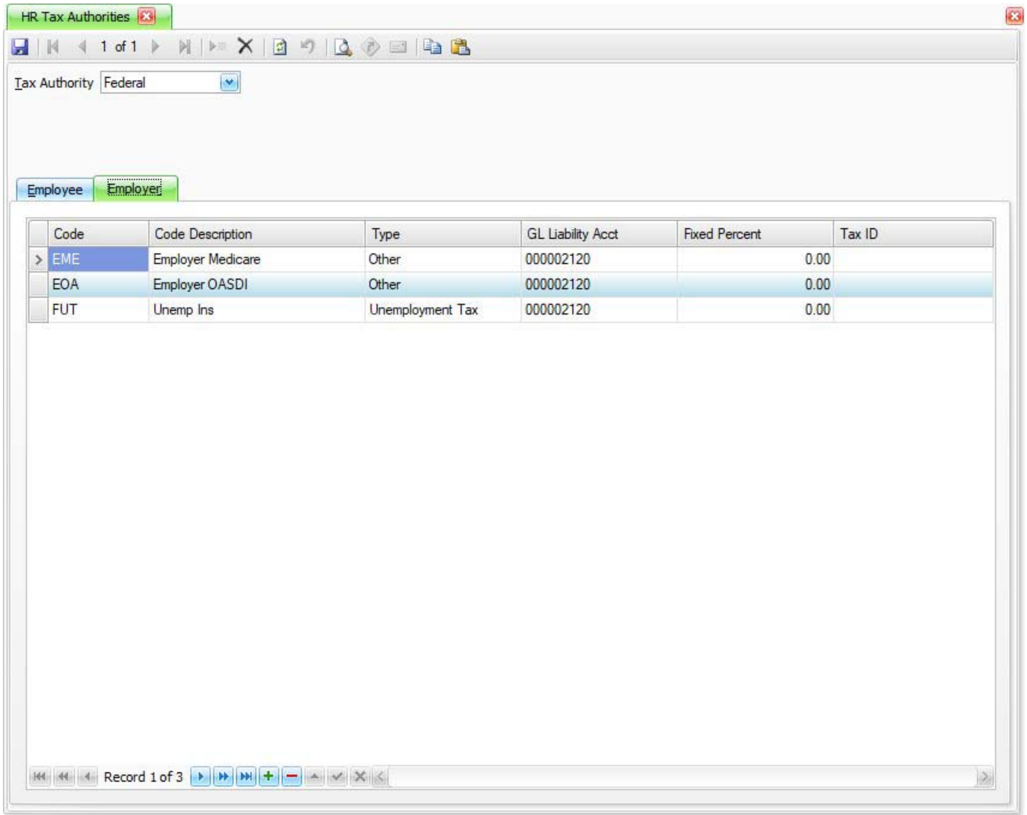


3. Select the Tax **Code** to work with.
4. The Federal Tax **Code Description** is displayed.
5. The Federal Tax Code's tax **Type** is displayed.
6. Select the **GL Liability Account** to credit for the Tax Code when you run the Payroll Post Checks function.
7. Enter the **Fixed Percent** to use for an Earning Code that has Fixed Withholding checked in the Earning Codes function (page 3-37) and is taxed at a fixed percent in the Payroll Calculate Checks function. Fixed Percent applies only to FWH.
8. Enter the Employer Federal **Tax ID** number you want to print on the W-2 form.

    This only needs to be entered into the FWH record.

9. Add all Tax Codes from the drop down list in the Code field and fill in all appropriate fields.

Employer Tab



1. Select the Tax **Code** to work with.
2. The Federal Tax **Code Description** is displayed.
3. The Federal Tax Code's tax **Type** is displayed.
4. Select the **GL Liability Account** to credit for the Tax Code when you run the Payroll Post Checks function.
5. Enter the Employer Federal **Tax ID** number you want to print on the W-2 form. This field can be left blank.
6. Add all Tax Codes from the drop down list in the Code field and fill in all appropriate fields.

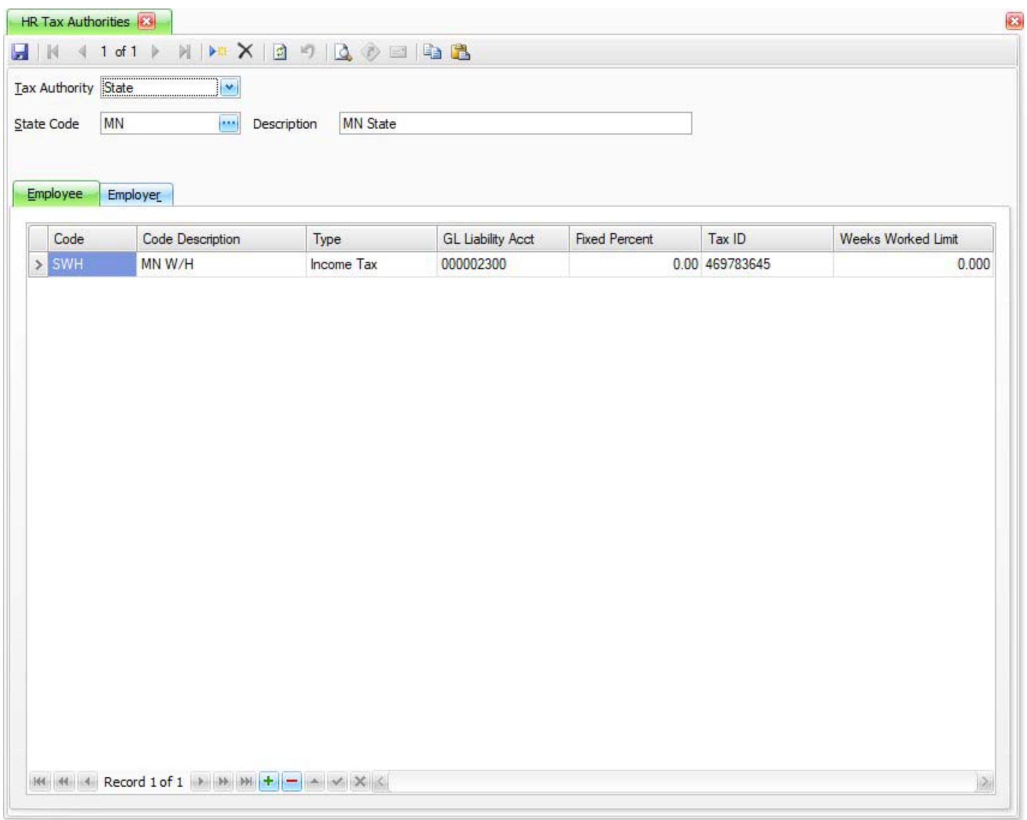
State Tax Setup

Use the **State Tax Setup** function to set up and maintain State Tax Authorities and Employee and Employer Tax Codes. All necessary State Tax Codes are preset by the system, but additional codes can be added. Refer to your local Open Systems reseller or to the Open Systems website at www.osas.com for periodic updates to the state tax files.

NOTE: If you have multiple companies using payroll that require different SUI rates or limits, set up a Payroll Formula and a company specific Payroll Tax Table.

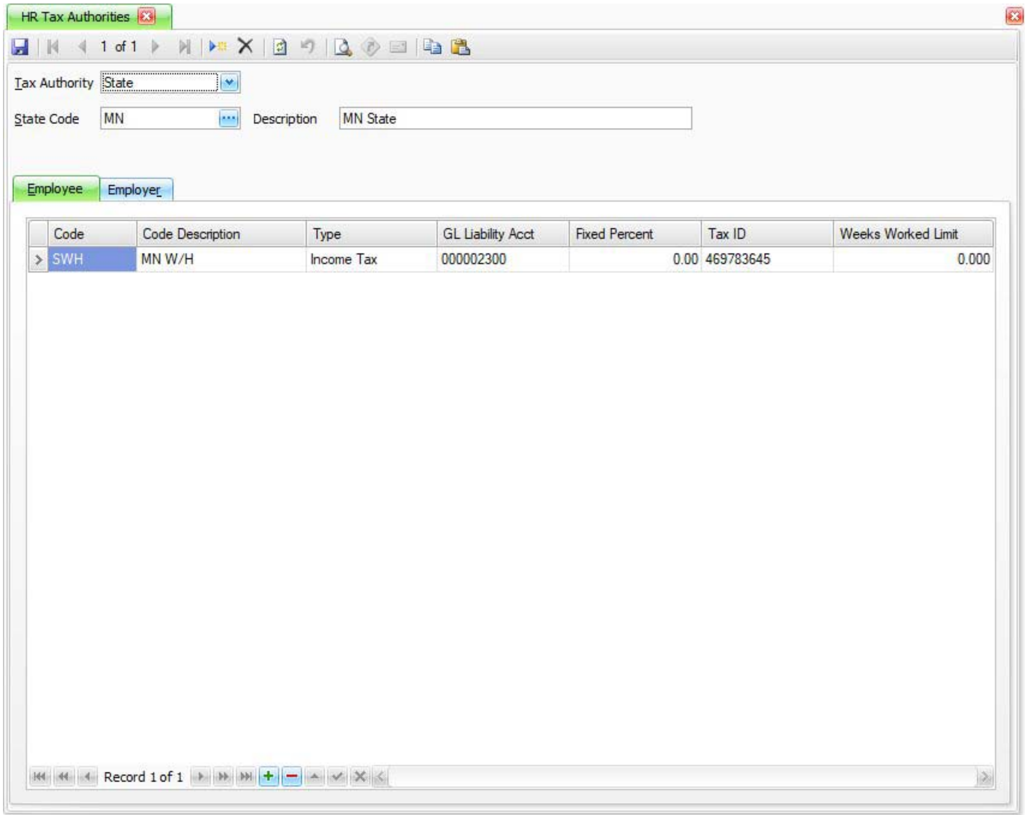
1. Select **State** as the **Tax Authority**.
2. The **State Tax Setup** screen appears with the Employee tab displayed.

State Tax Setup Screen



3. Enter the **State Code** with which to work.
4. The state **Description** is displayed.

Employee Tab

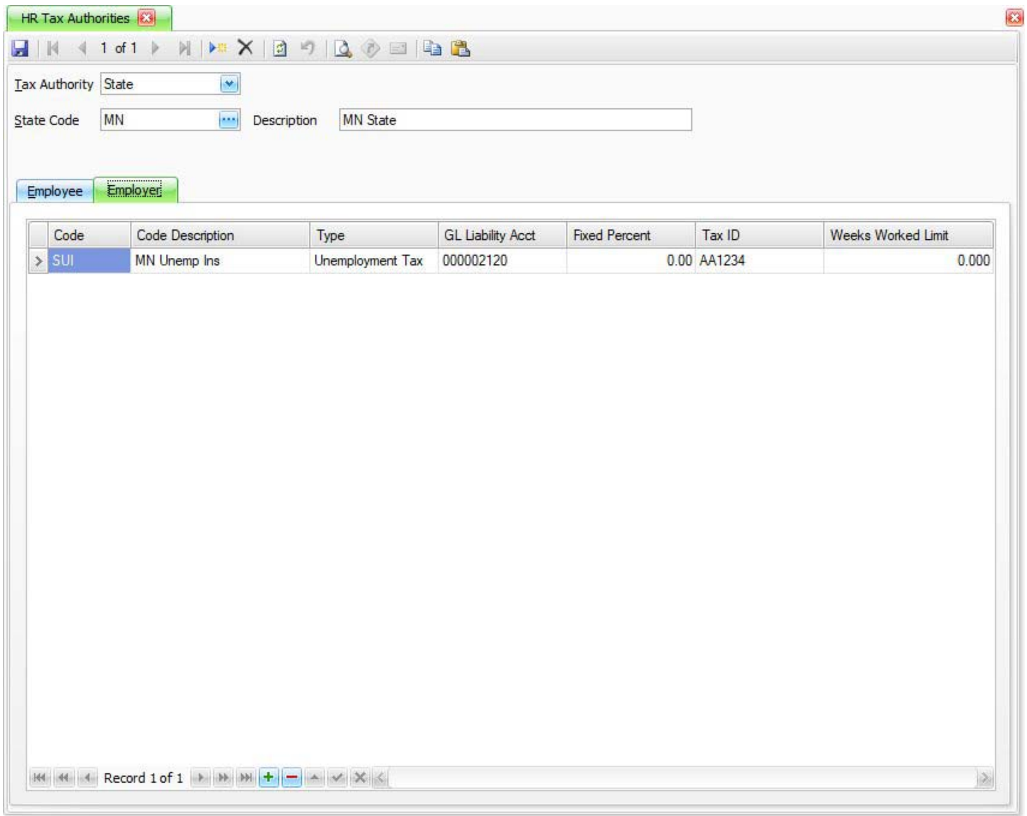


5. Select the tax **Code** with which to work.
6. The State Tax **Code Description** is displayed.
7. The State Tax Code's tax **Type** is displayed.
8. Select the **GL Liability Account** to credit for the Tax Code when you run the Payroll Post Checks function.
9. Enter the **Fixed Percent** to use for an Earning Code that has Fixed Withholding checked in the Earning Codes function (page 3-37) and is taxed at a fixed percent in the Payroll Calculate Checks function. Fixed Percent applies only to SWH.
10. Enter the Employer State **Tax ID** number you want to print on the W-2 form.

    You only need to enter the Tax ID into the SWH field, if the state has other taxes also.

11. In the **Weeks Worked Limit** field enter the minimum number of hours the Employee must work to qualify as one week of work for the State Tax Code. Accept the default, 0, if the State has no minimum.

Employer Tab



1. Enter a new State Employer tax **Code** or select a Code to work with.
2. Enter or edit the **Code Description** of the State Tax Code.
3. Select the Tax **Type**: **Income Tax**, **Unemployment Tax**, or **Other**.
4. Select the **GL Liability Account** to credit when you run the Payroll Post Checks function.
5. Enter your company's State **Tax ID** number. If you are working with SUI (State Unemployment Insurance) enter the Tax ID that you want to print on the Payroll State Unemployment Report on the Quarter/Year-End Reports menu.

6. In the **Weeks Worked Limit** field enter the minimum number of hours the Employee must work to qualify as one week of work for the State Tax Code. Accept the default, 0, if the state has no minimum.

Task Summary

To add a State Tax Authority Code, follow these steps:

1. Select the **New Record** icon on the toolbar.
2. Enter the new State Tax Authority in the **State Code** field.
3. Enter a **Description** of the State Tax Authority Code.
4. Click the **Save** button , on the toolbar, to save the new Tax Authority record.

To edit a State Tax Authority Code, follow these steps:

1. Select the **State Code** to edit.
2. Edit the State Code **Description**.
3. Click the **Save** button , on the toolbar, to save the edited Tax Authority record.

To delete a State Tax Authority Code, follow these steps:

1. Select the **State Code** to delete.
2. Select the **Delete** hot key (F3) or the **Delete** button .

Task Summary

To add a State Tax Code, follow these steps:

1. Select **State** for the **Tax Authority**.
2. Select the State Code for which to enter the Tax Code.
3. Select the **Employee** or **Employer** tab.
4. Select the **New Record** icon on the navigation bar at the bottom of the screen.
5. Enter the Tax **Code**, **Description**, **Type**, **GL Liability Account**, **Fixed Percent**, **Tax ID**, and **Weeks Worked Limit** if applicable.
6. Click the **Save** button , on the toolbar, to save the new Tax Code record.

To edit a State Tax Code, follow these steps:

1. Select **State** for the **Tax Authority**.
2. Select the **State Code** associated with the Tax **Code** you wish to edit.

3. Select the Tax **Code** to edit on the **Employee** or **Employer** tab.
4. Edit the appropriate information.
5. Click the **Save** button , on the toolbar, to save the edited Tax Code record.

To delete a State Tax Code, follow these steps:

1. Select **State** for the **Tax Authority**.
2. Select the **State Code** associated with the Tax **Code** you wish to delete.
3. Select the Tax **Code** to delete on the **Employee** or **Employer** tab.
4. Select the **Delete** hot key (F3) or the **Delete** button .

Local Tax Setup

Use the **Local Tax Setup** function to set up and maintain Local Tax Authorities and Employee and Employer Local Tax Codes.

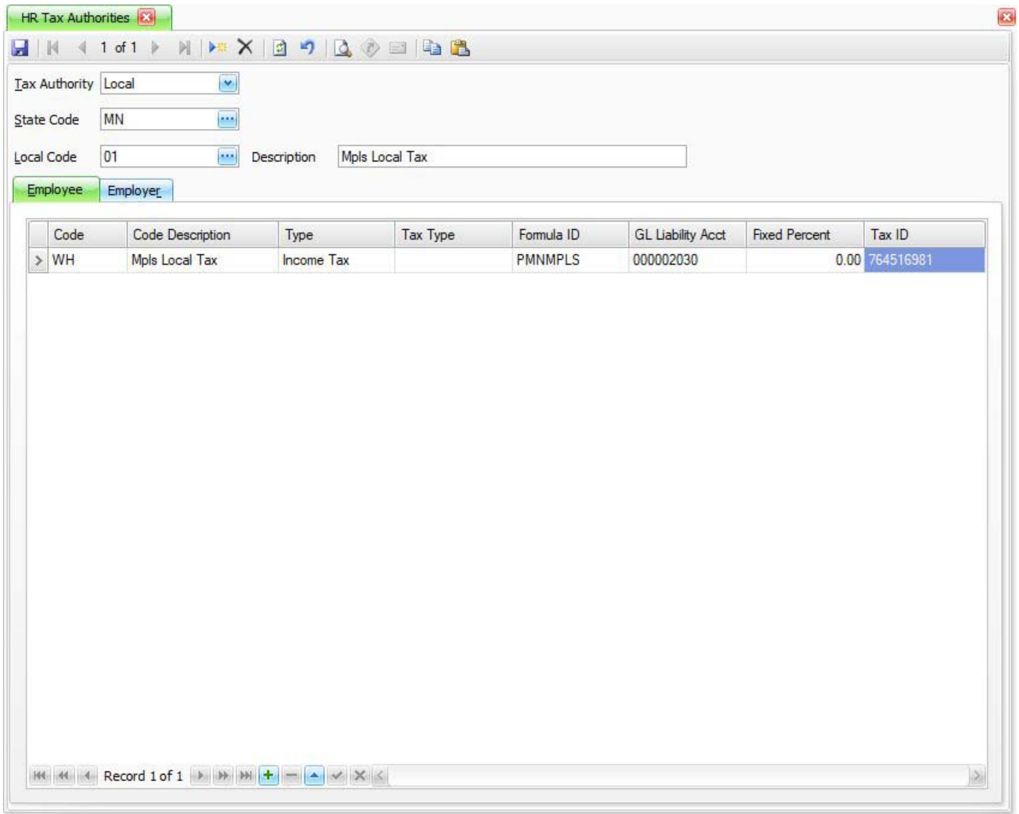
Open Systems does not maintain Local Tax Codes in the annual year end update.

To work with the **Local Tax Setup**, follow these steps:

1. Select **Local** as the **Tax Authority**.

2. The **Local Tax Setup** screen appears with the Employee tab displayed.

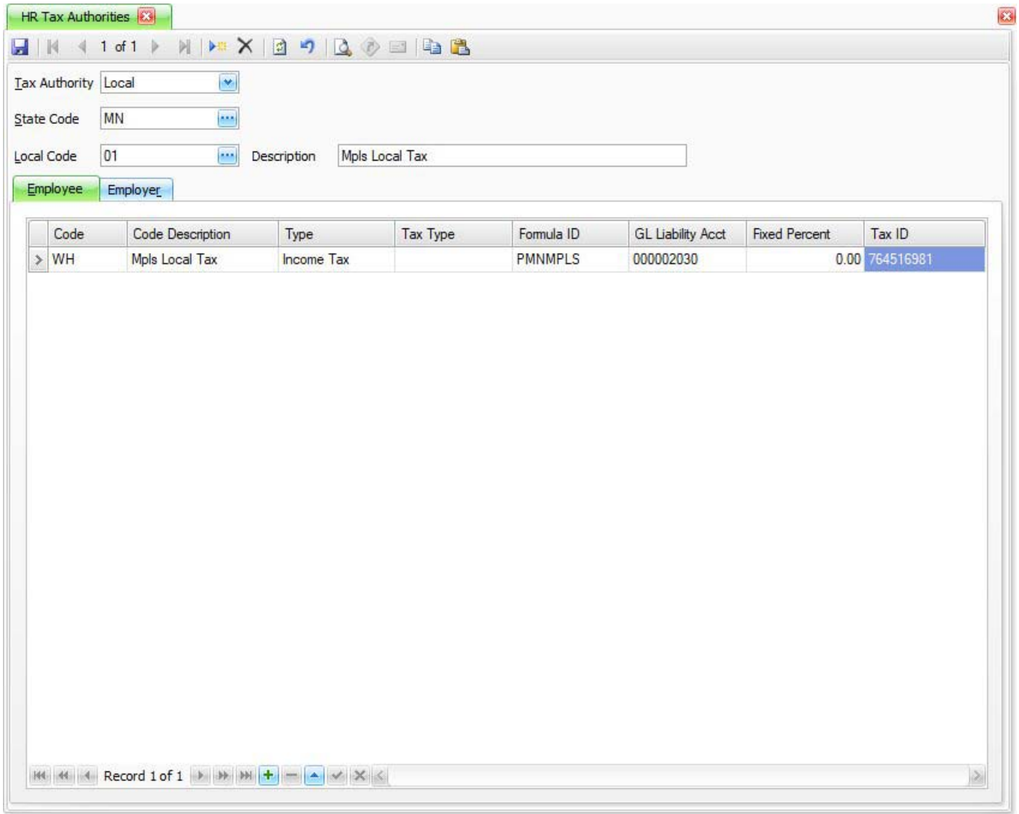
Local Tax Setup Screen



Maint

3. Select the **State Code** associated with the Local Tax Authority you wish to add or work with. To add a new State Code, use the State Tax Setup function (page 3-19).
4. Enter a new **Local Code** or select the Local Code with which to work.
5. Enter or edit a **Description** of the Local Tax Authority.

Local Tax Employee Tab



6. Select **Local** for the **Tax Authority**.
7. Select the **State** for the Local Tax.
8. Enter a **Local Code** for the Local Tax.
9. Enter a **Description** to describe the Local Tax.
10. Enter a new Local Tax **Code** or select a Tax Code with which to work.
11. Enter a **Description** of the Local Tax Code.
12. Select the **Tax Type**: **Income Tax**, **Unemployment Tax**, or **Other**. The Tax Type must be Income Tax to be included on the W-2.

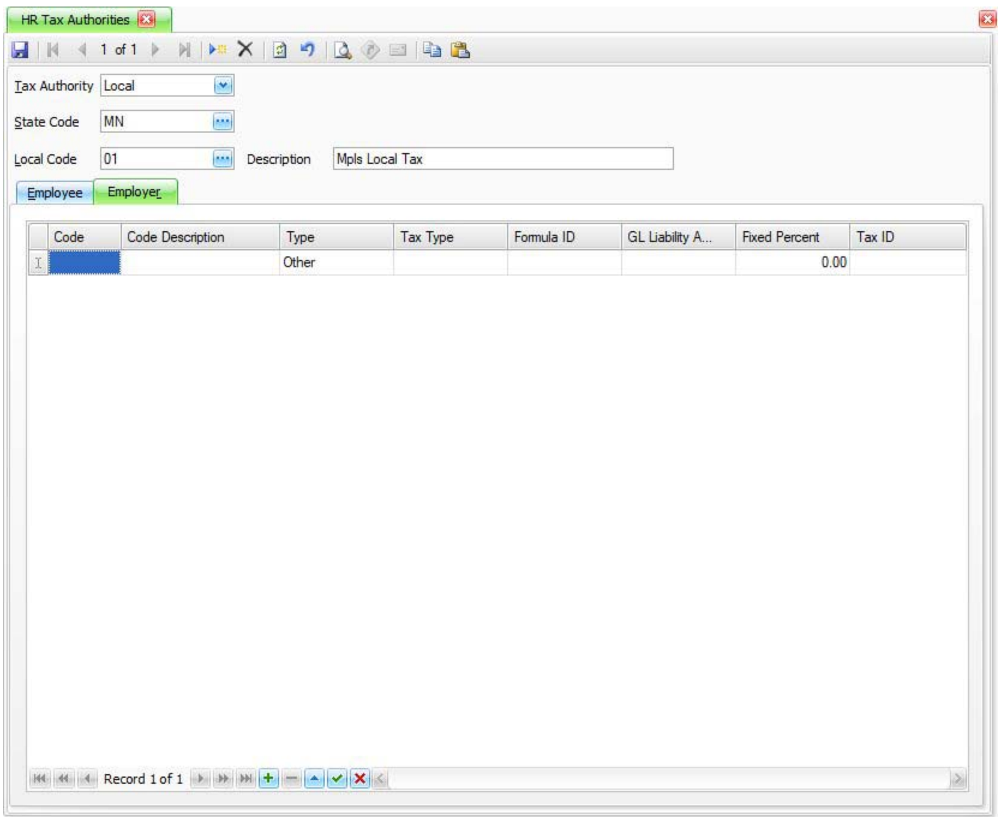
Maint

13. Select the **Formula ID** for the Tax Code. To setup new Formula IDs use the Payroll Formulas function on the Setup and Maintenance menu.
14. Select the **GL Liability Account** to credit when you run the Payroll Post Checks function.

15. Enter the **Fixed Percent** to use for an Earning Code that has Fixed Withholding checked in the Earning Codes function (page 3-37) and is taxed at a fixed percent in the Payroll Calculate Checks function. Fixed Percent applies only to LWH.

16. Enter your company's local **Tax ID** number.

Employer Tab



1. Enter a new local tax **Code** or select a Tax Code with which to work.

2. Enter a **Description** of the Local Tax Code.

3. Select the **Tax Type**: **Income Tax**, **Unemployment Tax**, or **Other**. The type must be Income Tax to show up on the W-2.

Maint

4. Select the **Formula ID** for the Tax Code. To setup new Formula IDs use the Payroll Formulas function on the Setup and Maintenance menu.

5. Select the **GL Liability Account** to credit when you run the Payroll Post Checks function.

6. Enter your company's local **Tax ID** number.

Task Summary

To add a Local Tax Authority Code, follow these steps:

1. Select the **New Record** icon on the toolbar.
2. Select **Local** for the **Tax Authority**.
3. Select the **State Code** associated with the Local Tax Authority Code you wish to add.
4. Enter the new Local Tax Authority in the **Local Code** field.
5. Enter a **Description** of the Local Tax Authority Code.
6. Click the **Save** button , on the toolbar, to save the new Tax Authority record.

To edit a Local Tax Authority Code, follow these steps:

1. Select **Local** for the **Tax Authority**.
2. Select the **State Code** associated with the Local Tax Authority Code you wish to edit.
3. Select the **Local Code** to edit.
4. Edit the Local Code **Description**.
5. Click the **Save** button , on the toolbar, to save the edited Tax Authority record.

To delete a Local Tax Authority Code, follow these steps:

1. Select **Local** for the **Tax Authority**.
2. Select the **State Code** associated with the Local Tax Authority Code you wish to delete.
3. Select the **Local Code** to delete.
4. Select the **Delete** hot key (F3) or the **Delete** button .

Task Summary

To add a Local Tax code, follow these steps:

1. Select **Local** for the **Tax Authority**.
2. Select the **State Code** associated with the Local Tax Authority Code for which you wish to add a Tax Code.
3. Select the **Local Code** for which to enter the Tax Code.
4. Select the **Employee** or **Employer** tab.
5. Select the **New Record** icon on the navigation bar at the bottom of the screen.

6. Enter the Tax **Code**, **Description**, **Type**, **Formula ID**, **GL Liability Account**, **Fixed Percent**, and **Tax ID** for the Local Tax Code.
7. Click the **Save** button, on the toolbar, to save the new Tax Code record.

To edit a Local Tax Code, follow these steps:

1. Select **Local** for the **Tax Authority**.
2. Select the **State** and **Local** Tax Authority **Code** associated with the Tax Code you wish to edit.
3. Select the Tax **Code** to edit on the **Employee** or **Employer** tab.
4. Edit the appropriate information.
5. Click the **Save** button, on the toolbar, to save the edited Tax Code record.

To delete a Local Tax Code, follow these steps:

1. Select **Local** for the **Tax Authority**.
2. Select the **State** and **Local** Tax Authority **Code** associated with the Tax Code you wish to delete.
3. Select the Tax **Code** to delete on the **Employee** or **Employer** tab.
4. Select the **Delete** hot key (F3) or the **Delete** button.

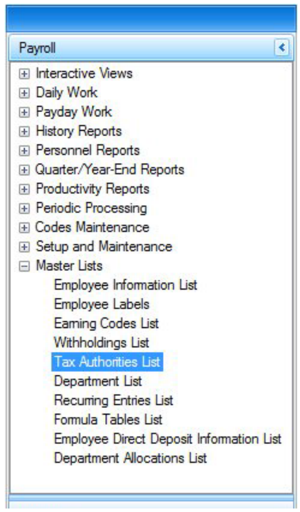
Producing a Tax Authorities List

Use the **Payroll, Tax Authorities List** function to produce a list of Tax Authorities you defined for your company in the Tax Authority Setup for Federal (page 3-16), State Tax Setup (page 3-19) and Local Tax Setup (page 3-23) functions on the Codes Maintenance menu.

To produce the **Tax Authorities List**, follow these steps:

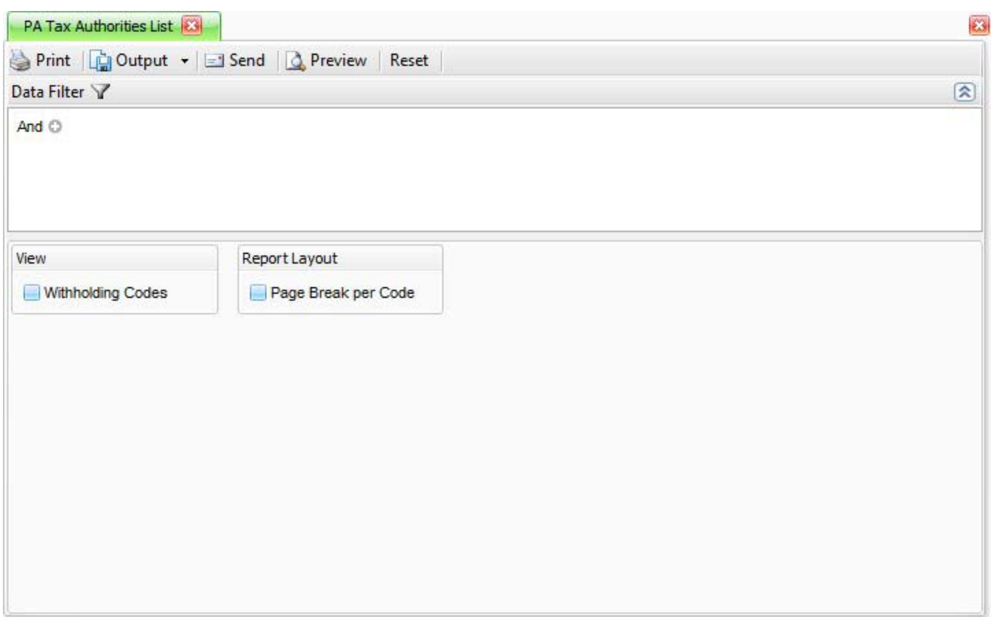
1. Select **Tax Authorities List** from the **Payroll Master Lists** menu.

Tax Authorities List Menu



2. The **Tax Authorities List** screen appears.

Tax Authorities List Screen



3. Select the range of **Filter Criteria** to include in the list or leave the fields blank to include all the Tax Authorities.
4. Select the box to **View Withholding Codes** in the list.
5. Select the box to include a **Page Break per Code**; otherwise, clear the box.
6. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Tax Authorities List

Continental Products Unlimited
Tax Authorities List

Page 1

Report Filter
View Withholding Codes Yes

		Employee Tax Information			Employer Tax Information		
Authority	**Description**	**Code**	**Description**	**GL Account**	**Code**	**Description**	**GL Account**
FED	Federal						
		EIC	Earned Income	00-000-2300	EME	Employer Medicare	00-000-2120
		FWH	Federal WH	00-000-2300	EOA	Employer OASDI	00-000-2120
		MED	Employee Medicare	00-000-2120	FUT	Unemp Ins	00-000-2120
		OAS	Employee OASDI	00-000-2120			
MN	MN State						
		SWH	MN W/H	00-000-2300	SUI	MN Unemp Ins	00-000-2120
WI	Wisconsin						
		SWH	WI State Withholding	00-000-2030	SUI	WI State Unemployment Insuran	00-000-2030
MN01	Minneapolis Local Tax						
		LWH	Local Withholding	00-000-2030			

8/20/2010 2:23 PM ***** End of Report ***** **OPEN_SYSTEMS\kenthe**

EARNING TYPES

Use the **Earning Types** function to set up and maintain different types of pay Employees can receive.

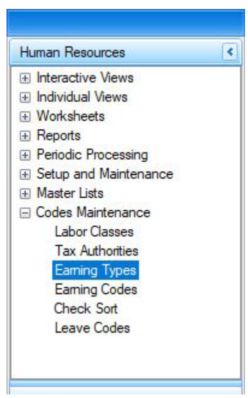
NOTE: Earning Types must be set up *prior to* Earning Codes (page 3-37).

All user-defined Earning Types added to the system are treated as Regular Pay, using the values entered in the Multiplier and Add to Base fields on the Earning Codes screen (page 3-37) to determine pay.

To work with **Earning Types**, follow these steps:

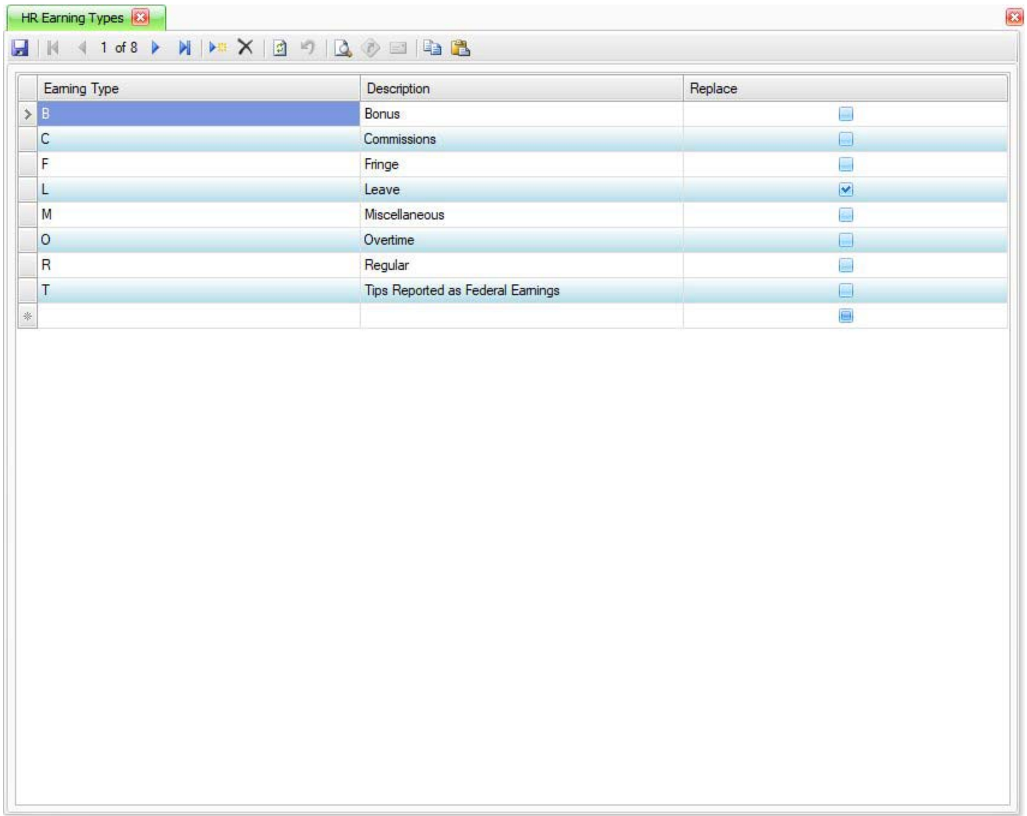
1. Select **Earning Types** from the **Codes Maintenance** menu.

Earning Types Menu



2. The **Earning Types** screen appears.

Earning Types Screen



3. The system includes eight preset Earning Types that cannot be changed, and allows you to add additional Earning Types specific to your company’s payroll.

Type	Description	Description
B	Bonus Pay	
C	Commission Pay	
F	Fringe	An earning code that is an earning type **F** should be reported in box 12 of the W-2 form.

Type	Description	Description
L	Leave	If you elected to use Automatic Accrual of Leave Time, you must use the earning type **L** in earning codes used to record leave pay. The system will deduct earning type **L** earning code transactions from the selected Remaining Leave Hours amount on the **Pay** tab in the Employee Information function.
M	Miscellaneous	
O	Overtime	
R	Regular Earnings	
T	Tips Reported as Federal Earnings	Earning codes with earning type **T** are accumulated for W-2 reporting in the FICA Tips field on the **Miscellaneous** tab in the Employee History View function (page 7-33). When W-2's are printed, the amount in the FICA Tips field will print in box 7.

4. Enter a new **Earning Type** or select the Earning Type with which to work.
5. Enter a **Description** of the Earning Type.
6. Select **Replace** for the Earning Type.

    If the Earning Type assigned to the Earning Code used has the **Replace** box unselected, the Earning Code's pay is added to the Salaried Employee's regular salary.

    If the Earning Type assigned to the Earning Code used has the **Replace** box checked, the Salaried Employee's salary is replaced by the Earning Code's pay.

EARNING CODES

Use the **Earning Codes** function to set up and maintain an unlimited number of Earning Codes for different types of work. Earning Codes store information used to calculate an Employee's pay for a particular type of work, such as assembly or packaging. They are also used to calculate pay for work such as overtime or shift-differential pay that multiplies or adds an amount to the Employee's base hourly rate.

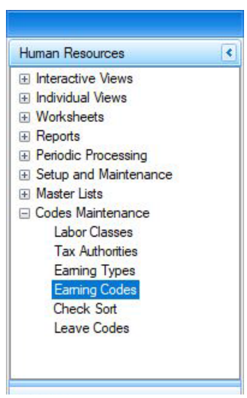
NOTE: Valid Earning Codes must be assigned to each Payroll Employee. You can select Copy To on the Earning Codes screen and copying Earning Codes to a range of Payroll Employees, or enter the valid codes into the Earning Codes field on the Pay tab in Payroll Employee Information.

NOTE: Earning Types (page 3-33) must be set up *before* Earning Codes.

To work with **Earning Codes**, follow these steps:

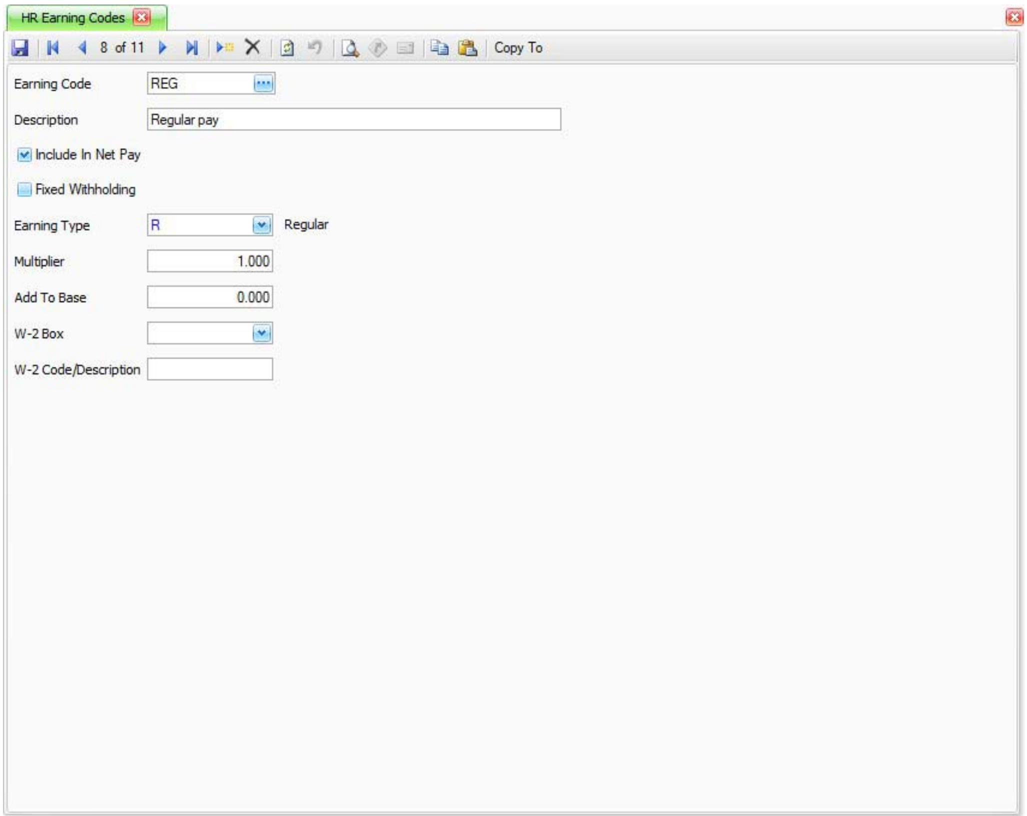
1. Select **Earning Codes** from the **Codes Maintenance** menu.

Earning Codes Menu



2. The **Earning Codes** screen appears.

Earning Codes Screen



Each Payroll Employee is assigned a default Earning Code on the **Pay** tab in the Payroll Employee Information function. You can override default Earning Codes when entering Payroll Transactions.

3. Select the **New Record** icon  on the toolbar. A blank record appears.
4. Enter a new **Earning Code** or select the Earning Code with which to work.
5. Enter a **Description** of the Earning Code.
6. Check the **Include in Net Pay** box to include the Earning Code's pay in the Employee's net pay; otherwise, clear the box. Excluding an Earning Code from net pay *does not* exclude earnings from taxable income. To exclude an Earning Code from taxable income, use the Payroll Exclusions function.

An example of an Earning Code that would *not* be included in an Employee's net pay is earned tips. This type of Earning Code transaction would add pay information to the Employee's history record and be used to calculate Withholdings and Deductions, but the earned tips amount would *not* be added to the Employee's take-home wages included on the pay check printed.

7. Check the box to use a **Fixed Withholding** to calculate Withholdings due for the pay amounts entered with this Earning Code. Fixed Withholdings are used for income tax types of Withholdings only. The percentage amount of the Fixed Withholding is specified in the Tax Authority Setup functions (page 3-15).

NOTE: If you do not use a Fixed Withholding, the Withholding is calculated according to the regular Federal, State, or Local Tax routines.

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8. Select the **Earning Type** for the Earning Code. Refer to Earning Types (page 3-33) to determine which Earning Type is appropriate for the Earning Code, or to set up a new Earning Type.

9. Enter the **Multiplier** number by which to multiply the Employee's hourly rate. For example; if you enter an Earning Code with a multiplier of 1.5000, then enter a time ticket for an Employee whose base hourly rate is $10 per hour with the aforementioned Earning Code. The employee's pay rate will be $10.00 * 1.5000 = $15.00 per hour.

   This field is required. If you do not want the Multiplier to modify the Employee's base hourly rate, accept the default, 1.

10. Enter the **Add to Base** amount to be added to the Employee's hourly rate.

    If the Add to Base and Multiplier fields are both used for an Earning Code, the Add to Base amount is added to the Employee's pay rate first. The new base pay is then multiplied by the Multiplier.

    For example, if the employee's hourly rate is $9.00, and the Earning Code used has an Add to Base amount of $1.00 and a Multiplier 2.0, the rate of pay used for the Earning Code will be ($9 +$1) * 2 = $20.

NOTE: A Salaried Employee must have an amount entered in the Hourly Rate field on the Pay tab in the Payroll Employee Information function in order for the system to use the Add to Base and Multiplier functions for the Employee.

11. Enter the number of the **W-2 Box**, on the W-2 form in which to print the accumulated amount. For example; when entering an Earning Code for Dependent Care Benefits, enter W-2 box 10. When entering an Earning Code for 100% Use of Auto, enter W-2 box 12. When entering an Earning Code for excludable moving expense reimbursements, enter W-2 box 14. Refer to the Federal W-2 form, or other federally published materials pertaining to W-2 reporting, for more information.
12. Enter the **W-2 Code/Description** to print in the W-2 box. Descriptions are required for W-2 boxes 12 and 14 only.

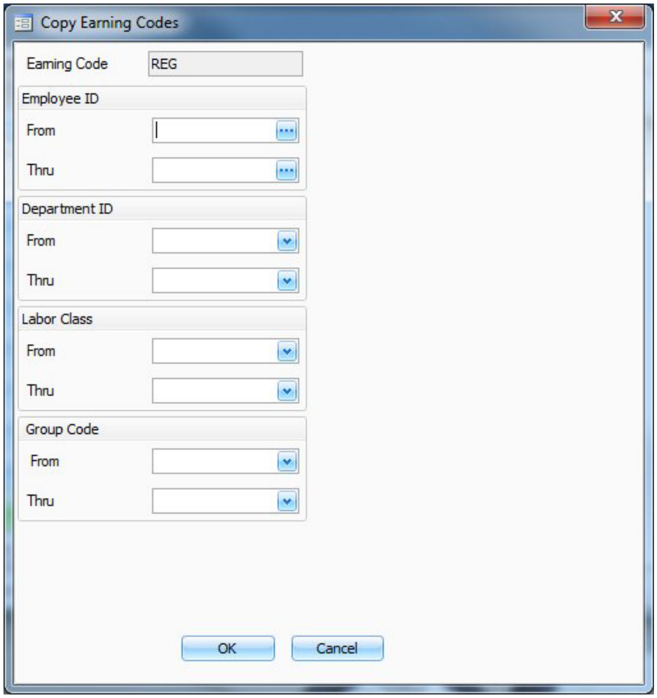
Command Buttons

Name	Description
Copy To	Display the Copy Earning Codes dialog box.

Copying Earning Codes to Groups of Employees

Set up Earning Codes and use the Copy To dialog box to copy the Earning Codes to groups of Payroll Employees.

Copy Earning Codes Dialog Box



The Copy Earning Codes function copies the selected Earning Code to the Valid Earning Codes list for the Employee(s) and selection criteria you specify.

1. Select the range of **Employee ID From** and **Thru**, for which to copy the selected Earning Code. Leave the From and Thru blank to copy the Earning Code to all Payroll Employees.
2. Select the range of **Department ID From** and **Thru**, for which to copy the earning code. Leave the From and Thru blank to copy the Earning Code to Payroll Employees in all Departments.
3. Select the range of **Labor Class From** and **Thru**, for which to copy the Earning Code. Leave the From and Thru blank to copy the Earning Code to Payroll Employees for all Labor Classes.
4. Select the range of **Group Code From** and **Thru**, for which to copy the Earning Code. Leave the From and Thru blank to copy the Earning Code to Payroll Employees for all Group Codes.

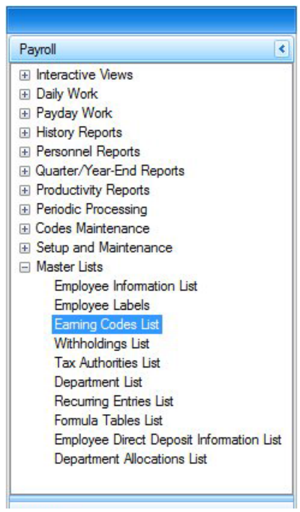
Producing an Earning Codes List

Use the **Payroll, Earning Codes List** function to produce a list of Earning Codes you defined for your company in the Earning Codes Setup (page 3-37) function on the Codes Maintenance menu.

To produce the **Earning Codes List**, follow these steps:

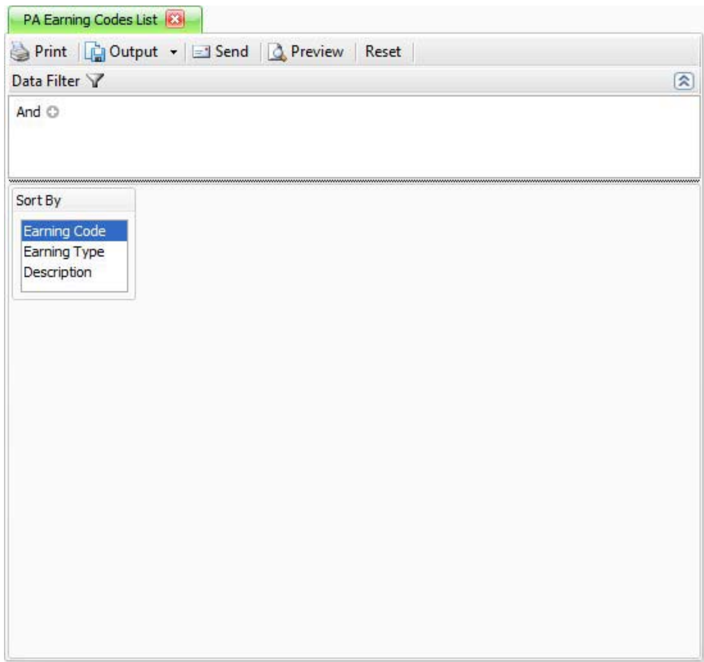
1. Select **Earning Codes List** from the **Payroll Master Lists** menu.

Earning Codes List Menu



2. The **Earning Codes List** screen appears.

Earning Codes List Screen



3. Select the range of **Filter Criteria** to include in the list or leave the fields blank to include all the Earning Codes.
4. Select the method to **Sort By**; **Earning Code**, **Earning Type**, or **Description**.

5. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Earning Codes List

Continental Products Unlimited
Earning Codes List
Sorted by Earning Code

Page 1

Report Filter

Earning Code	Description	Include In Net Pay	Fixed Withholding	Earning Type	Replace	Multiplier	Add To Base	W-2 Box	W-2 Code/Description
DBL	Double Time	Yes	No	O	No	2.000	0.000		
OVT	Overtime Pay	Yes	No	O	No	1.500	0.000		
P01	Bonus	Yes	Yes	M	No	1.000	0.000		
P02	Travel Exp	Yes	No	M	No	1.000	0.000		
P03	Cash Value	No	No	F	No	1.000	0.000	14	
P04	Commissions	Yes	No	M	No	1.000	0.000		
P05	Rpt Tips	No	No	T	No	1.000	0.000		
REG	Regular pay	Yes	No	R	No	1.000	0.000		
SAL	Salaried Wage	Yes	No	R	No	1.000	0.000		
SIC	Sick Pay	Yes	No	L	Yes	1.000	0.000		
VAC	Vacation Pay	Yes	No	L	Yes	1.000	0.000		

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*** End of Report ***

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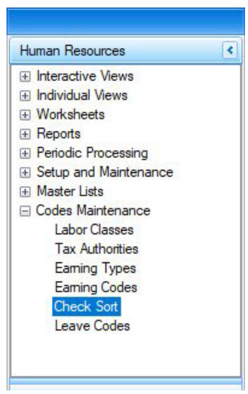
CHECK SORT

Use the **Check Sort** function to set up and maintain Check Sort IDs that allow you to print payroll checks in specified groups. Each Payroll Employee can be assigned a Check Sort on the Pay tab in the Payroll Employee Information function. Checks can then be printed according to their Check Sort ID in the Payroll Print Checks function.

To set up **Check Sort**, follow these steps:

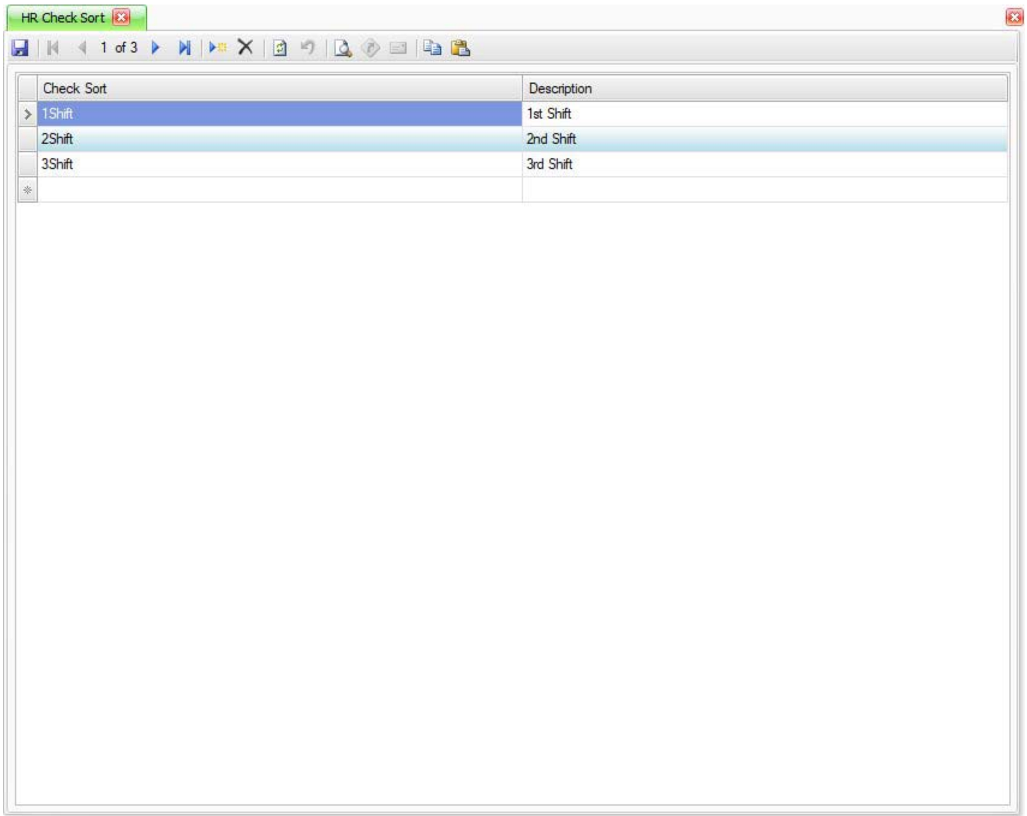
1. Select **Check Sort** from the **Codes Maintenance** menu.

Check Sort Menu



2. The **Check Sort** screen appears.

Check Sort Screen

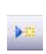


3. Enter a **Check Sort** ID to assign to a group of Employee payroll checks. Each Employee is then assigned a Check Sort ID on the Pay tab in the Payroll Employee Information function.

4. Enter a **Description** of the Check Sort.

Task Summary

To add a Check Sort ID follow these steps:

1. Select the **New Record** icon  on the toolbar.

2. Enter an ID to assign the **Check Sort** field.

3. Enter a **Description** of the Check Sort.

To edit a Check Sort ID follow these steps:

1. Select the ID of the **Check Sort** to edit.
2. Edit the **Description** of the check sort.

To delete a Check Sort ID follow these steps:

1. Select the ID of the **Check Sort** to delete.
2. Click the **Delete** button , on the toolbar, to delete the selected Check Sort.

Producing a Check Sort List

Use the **Check Sort List** function to produce a list of information you set up in the Check Sort function (page 3-47) on the Codes Maintenance menu.

To produce the **Check Sort List**, follow these steps:

1. Select the **Print Preview** button to preview the Check Sort list.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Check Sort List

Continental Products Unlimited
HR Check Sort

Page 1

Check Sort	Description
1Shift	1st Shift
2Shift	2nd Shift
3Shift	3rd Shift

10/10/2017 3:57 PM **Kent.Heitkamp**

LEAVE CODES

Use the **Leave Codes** function to set up and maintain sick and vacation accrual codes. Sick and vacation codes are used only if you elected to use Automatic Accrual of Leave Time in the Payroll Business Rules. There is no distinction between sick leave codes and vacation leave codes. Both types of codes are set up using the same form.

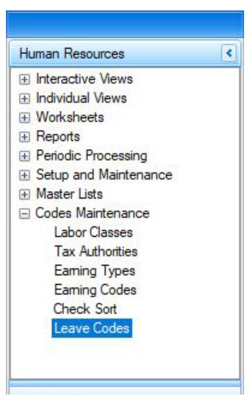
Leave Codes are used in Leave Plans, which are used in the Positions maintenance screen. Leave Plan balances are only accumulated in Payroll. TRAVERSE HR does not delete, move or update balances. Only the Leave Code is transferred to Payroll.

When entering a Daily Work Payroll Transaction, a Leave Code will be required to be selected when entering a record for an Earning Code with a Leave Earning Type. This will determine the Leave Code and the hours accrued from which to deduct the accrued hours.

To set up **Leave Codes**, follow these steps:

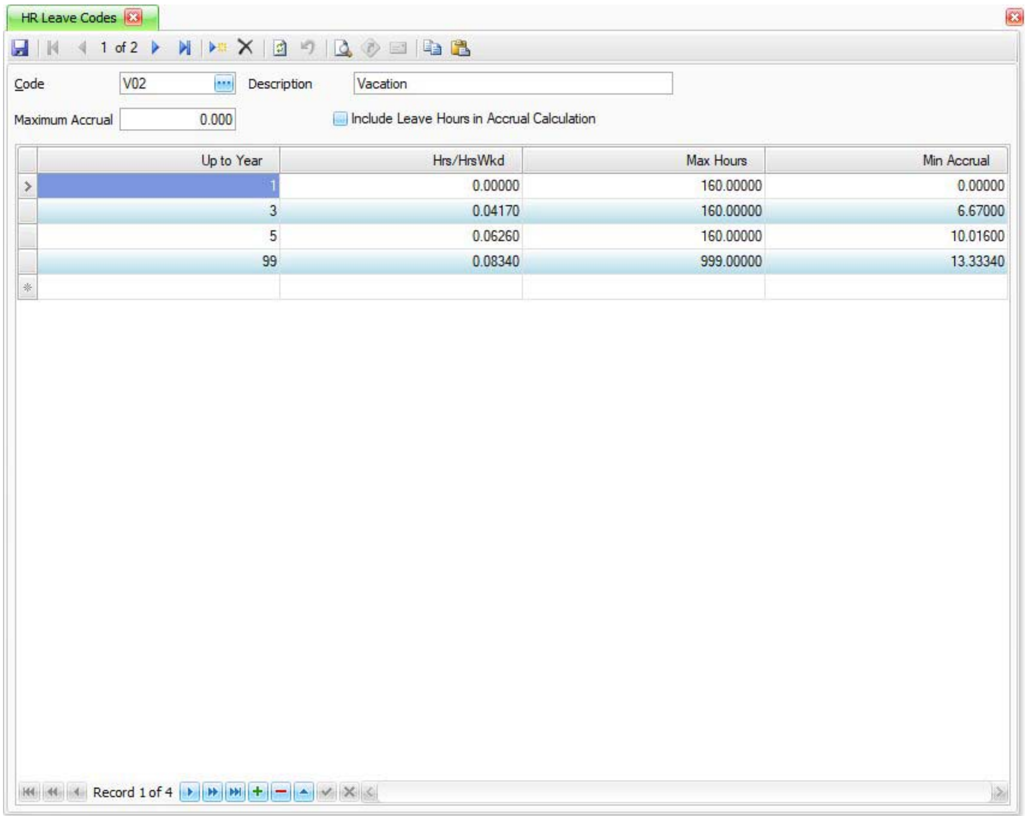
1. Select **Leave Codes** from the **Codes Maintenance** menu.

Leave Codes Menu



2. The **Leave Codes** screen appears.

Leave Codes Screen



1. Enter a new Leave **Code** or select the Leave Code with which to work.
2. Enter a **Description** of the Leave Code.
3. Enter the **Maximum Accrual** hours that may be accrued for this Leave Code. Once the number of hours accrued for this Leave Code reaches this amount, the Leave Code will no longer accrue hours. Leave the amount at 0.00 to indicate there is no limit.
4. Check the box to **Include Leave Hours in Accrual Calculation**. If this box is checked, leave hours will be accrued when taking leave hours for this Leave Code, if leave is accrued on a per hour basis.
5. Enter the **Up to Year** number of years of employment Employees must have in order to accrue Leave time at the defined rate.

Example: Enter 1 to accrue Leave at the defined rate for Employees with up to one year of employment. Enter 2 to accrue Leave at the defined rate for employees with more than 1 year and up to 2 years of employment, and so on.

6. Enter the number of leave hours accrued for every hour the Employee works into the **Hrs/HrsWkd** field. Decimals can be used if necessary.
7. Enter the **Max Hours** per pay period that can be used to calculate Leave Accrual.

    Example: If you assign an employee the leave code S80 which allows a maximum of 80 hours per pay period to accrue Leave, and the Employee works 84 hours during the pay period, only 80 of those hours worked will count towards the accrual of Leave time.

8. In the **Min Accrual** field enter the minimum number of Leave hours Employees can accrue per pay period. If the calculated accrual amount is less than the Minimum Accrual, the Minimum Accrual is used.

    This field may also be used to indicate how many Leave hours Salaried Employees will accrue during a pay period. Since no transactions are needed to calculate checks, no hours are recorded and the Hrs/HrsWkd is not calculated.

Task Summary

To add a Leave Code follow these steps:

1. Select the **New Record** icon on the toolbar. The **Copy From** field appears and you can select an existing Leave Code to copy from.
2. Enter the required information on the **Leave Codes** screen.
3. Click the **Save** button , on the toolbar, to save the new Leave Code.

To edit a Leave Code follow these steps:

1. Select the Leave **Code** to edit.
2. Edit the appropriate information on the **Leave Codes** screen.
3. Click the **Save** button , on the toolbar, to save the edited Leave Code.

To delete a Leave Code follow these steps:

1. Select the Leave **Code** to delete.
2. Click the **Delete** button , on the toolbar, to delete the selected Leave Code.

Producing a Leave Codes List

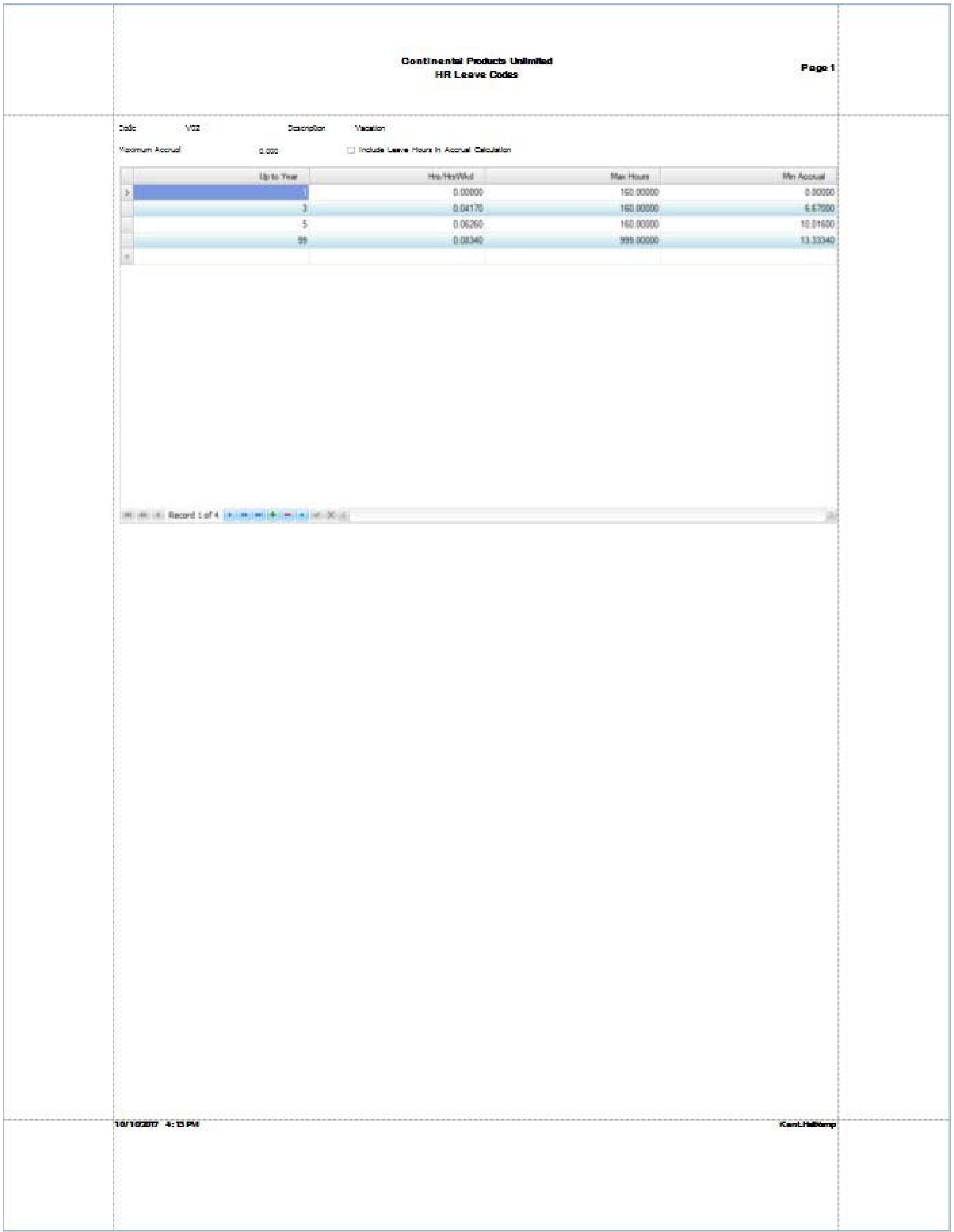
Use the **Leave Codes List** function to produce a list of information you set up in the Leave Codes function (page 3-51) on the Codes Maintenance menu.

To produce the **Leave Codes List**, follow these steps:

1. Select the **Print Preview** button to preview the Leave Codes.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Leave Codes List



Continental Products Unlimited
HR Leave Codes

Page 1

Code V02 Description Vacation

Maximum Accrual 0.000 ☐ Include Leave Hours In Accrual Calculation

Up to Year	Hrs/HrsWkd	Max Hours	Min Accrual
1	0.00000	160.00000	0.00000
3	0.04170	160.00000	6.67000
5	0.06260	160.00000	10.01600
99	0.08340	999.00000	13.33340

Record 1 of 4

10/10/2017 4:13 PM

Kent.Hallkamp

USING SETUP AND MAINTENANCE

Use the Setup and Maintenance functions to set up Individuals, Job Titles, Processes, Positions, Review Types, Tests, Property Codes, Attributes, Health Plans, Life Insurance Plans, Leave Plans, Retirement Plans, Type Codes, and Departments.

Type Codes

Use the Type Code (page 3-59) maintenance function to set up codes to describe such attributes as ethnicity, gender, marital status, veteran status, and other codes.

Job Titles

Job Titles (page 3-79) are used by a number of reports, including the Longevity Report. They also are fed to TRAVERSE Payroll.

The first step is to set up the job categories in the Type Codes maintenance screen on the Setup and Maintenance menu. Selecting Job Category from the Table Code drop-down list.

Processes

The Processes (page 3-83) function allows you to set up any number of new processes with checklist items and Individuals responsible for each item.

The first step is to set up the process checklist items. This is done on the Type Codes maintenance screen from Setup and Maintenance by selecting Process Checklist from the Table Code drop-down list.

Positions

The Positions (page 3-85) function and reports allow you to set up positions within your company. Positions are established within departments and work locations and are assigned to Individuals, who inherit certain Payroll and organizational data from the assignment, such as department, work location, manager, worker compensation code, job title and job category. If a supervisor leaves and a new Employee assigned to that position, there is no need to go and update all of the people under that supervisor, as it will be updated through the positions screen.

Review Types

The TRAVERSE HR application allows you the flexibility to set up a number of Review Types (page 3-99), each with their own evaluation criteria and review cycles.

Tests

Standard Tests (page 3-103) can be set up and then maintained on each Individual.

Property Codes

The Property Code (page 3-107) maintenance screen and report allow you to track company property (keys, cell phones, laptops, etc.), as they are assigned to an Individual.

Attributes

Attributes (page 3-111) are found on the Attributes tab in the Individual Maintenance screen. You must first set up the Attribute Groups (page 3-61) in the Type Codes function, then you may set up the Attributes. There can be multiple Attributes for each Attribute Group.

Health Plans, Life Insurance Plans, and Retirement Plans

There are three Benefit Plan types: Life Insurance (page 3-123), Retirement Plans (page 3-135), and Health Insurance (page 3-115).

After you have set up the Benefit Type in Type Code Maintenance, there are two steps that must be followed to set up a new plan before an Employee can be enrolled:

- The company providing the plan (life insurance carrier, health insurance carrier, or retirement plan trustee) must be set up in the Type Codes function.
- The plan details (group number, deduction frequency, waiting period/minimum age, etc.) must be set up.

Leave Plans

Leave Plans (page 3-131) are used in the Positions (page 3-85) maintenance screen. Leave Plan balances are only accumulated in Payroll. TRAVERSE HR does not delete, move or update balances. Only the Leave Code is transferred to Payroll.

TYPE CODES

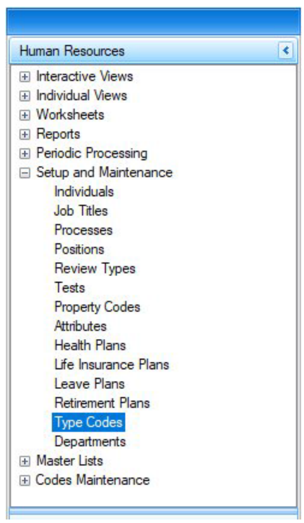
Use the **Type Code** maintenance function to set up codes to describe such attributes as ethnicity, gender, marital status, veteran status, and other codes.

Type Codes should be set up prior to setting up the rest of the Setup and Maintenance menu items. Type Codes are used in other functions.

To set up **Type Codes**, follow these steps:

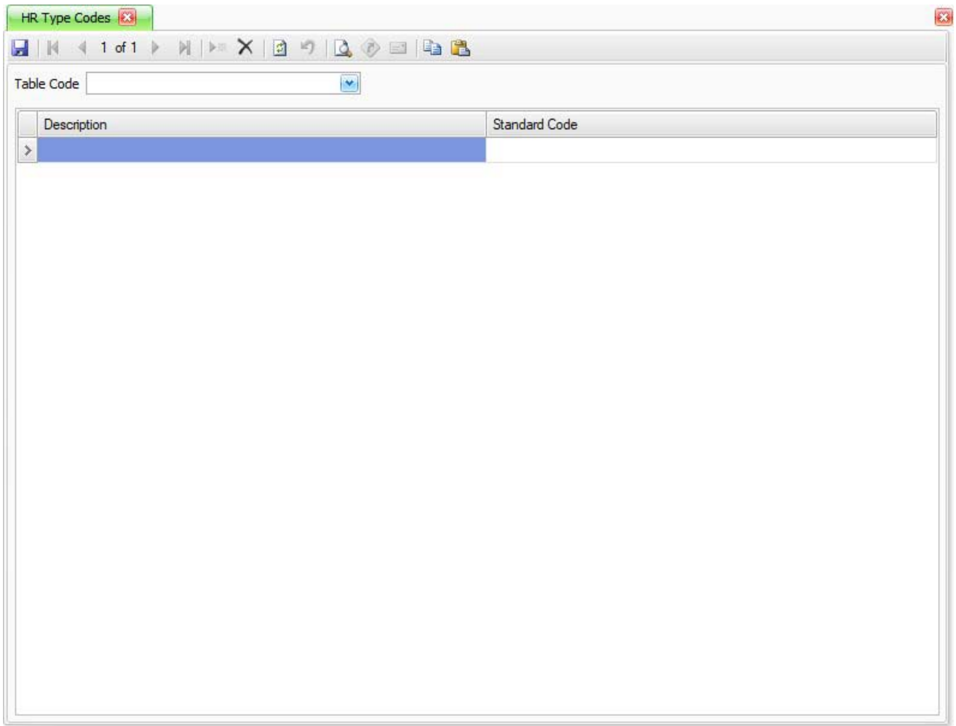
1. Select **Type Codes** from the **Setup and Maintenance** menu.

Type Codes Menu



2. The **Type Codes** screen appears.

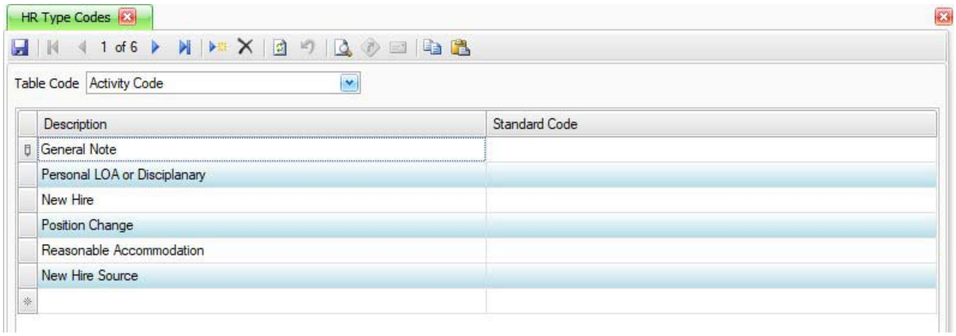
Type Codes Screen



3. Select a **Table Code** from the drop-down list.
4. Use the **New Record** button () on the tool bar, to add a new Type Code, or select a Type Code to edit.
5. If adding a new record, enter a Type Code **Description**.
6. The **Standard Code** value indicates whether the selected Table's Type Codes match standard values used in Dept of Labor or Compliance reporting. When available, make sure you select a Standard Code from the drop-down list to associate with the Type Code.
7. Click the **Save** button  on the toolbar to save your changes.

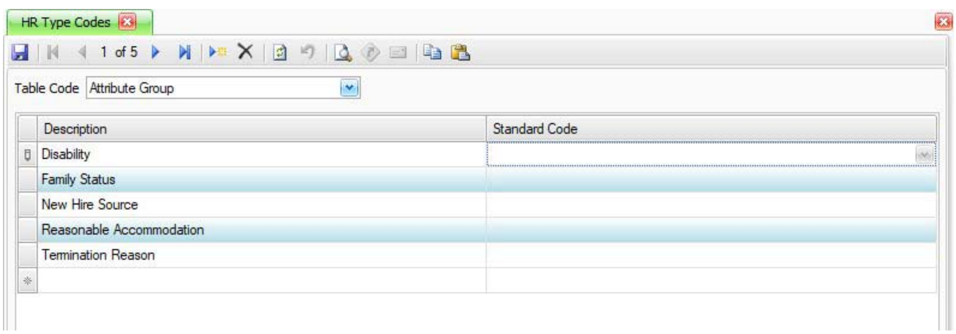
Table Codes

Activity Code



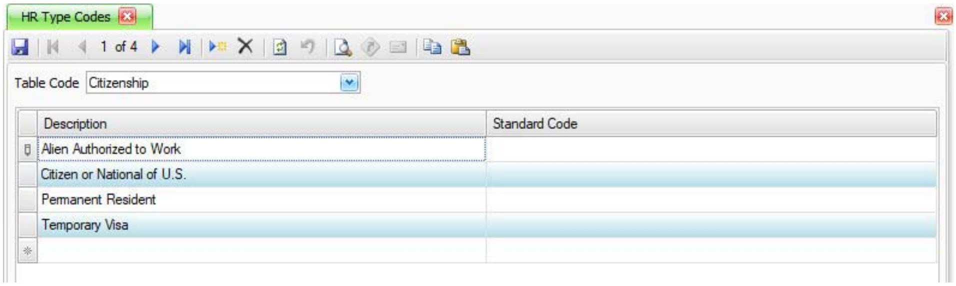
The **Activity Code** is used on the **Notes** tab (page 3-160) of the **Individuals** maintenance screen. It is used to describe the type of Activity that the Notes are about.

Attribute Group Code



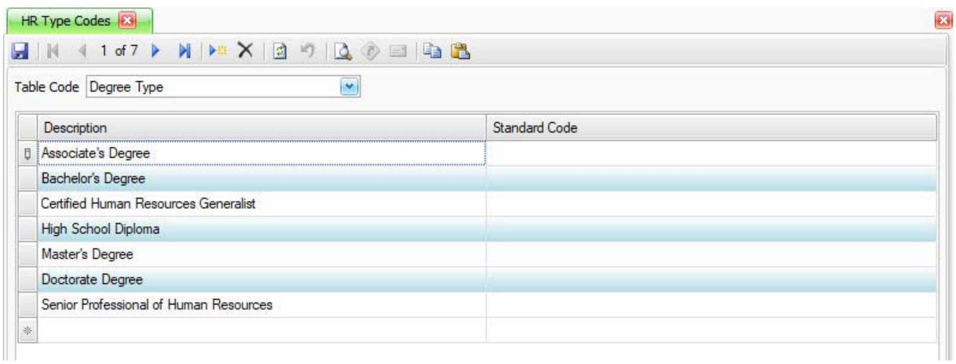
The **Attribute Group** Type Code is used on the **Attributes** tab (page 3-166) of the **Individuals** maintenance screen. It is used to describe groups of custom Attributes you may want to track. You can add Attributes to the Attribute Groups via the **Attributes** maintenance function.

Citizenship



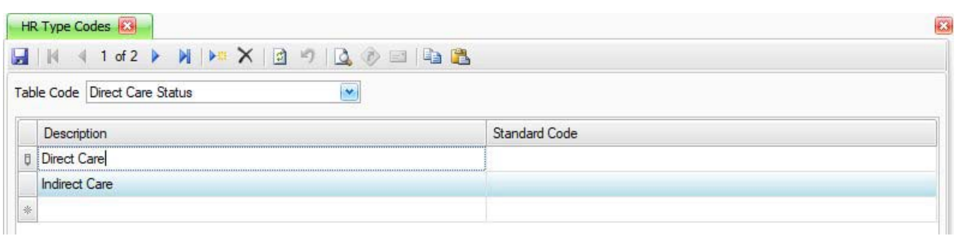
Citizenship is used on the **General** tab (page 3-154) of the **Individuals** maintenance screen.

Degree Type



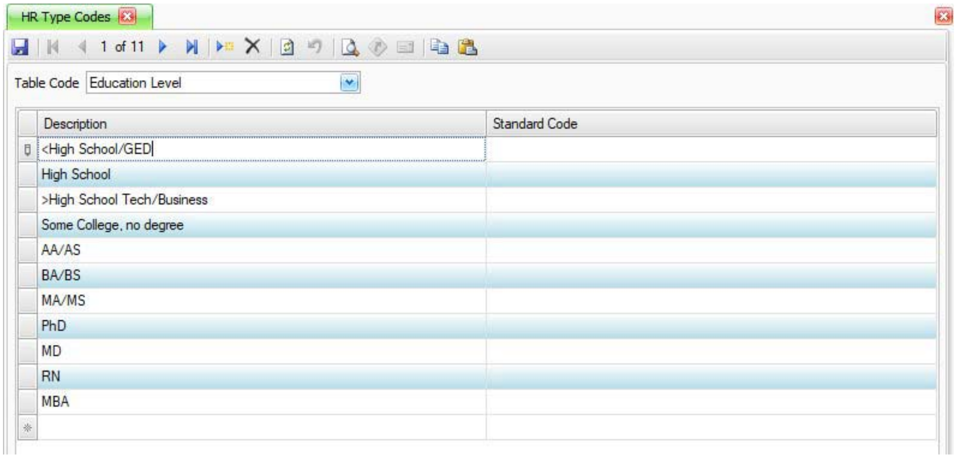
Degree Type is used on the **General** tab (page 3-154) of the **Individuals** maintenance screen.

Direct Care Status



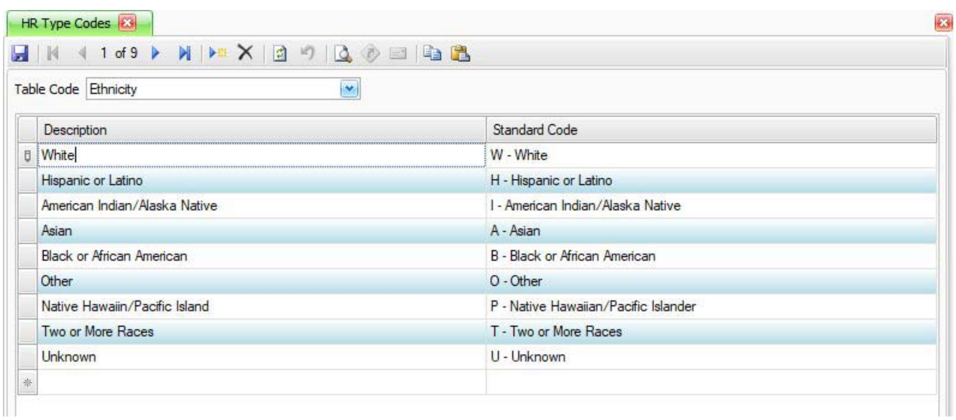
Direct Care Status is used in the **Positions** maintenance (page 3-85) function on the **Position Info** tab.

Education Level



Education Level is used in the **Positions** maintenance (page 3-85) function on the **Position Info** tab.

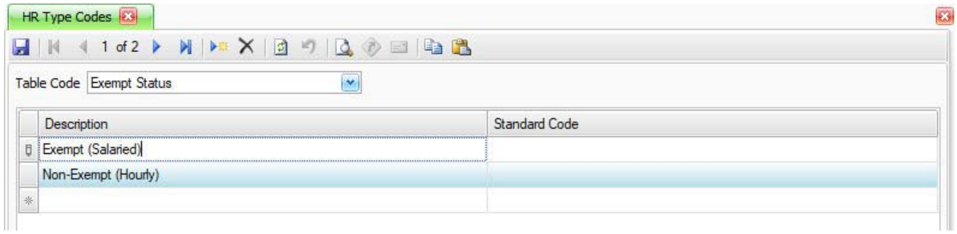
Ethnicity



Ethnicity Type Codes are entered for each individual on the **General** (page 3-154) tab of the **Individuals** maintenance screen. They are used by the EEO and DOL reports.

1. Enter the **Description** as desired.
2. Select the **Standard Code** that matches the required standard as determined by reporting requirements.

Exemption Status

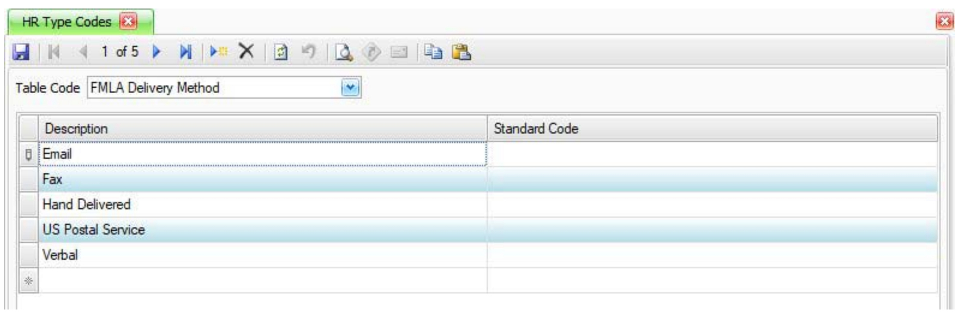


Exemption Status is used in the **Positions** maintenance (page 3-85) function on the **Position Info** tab.

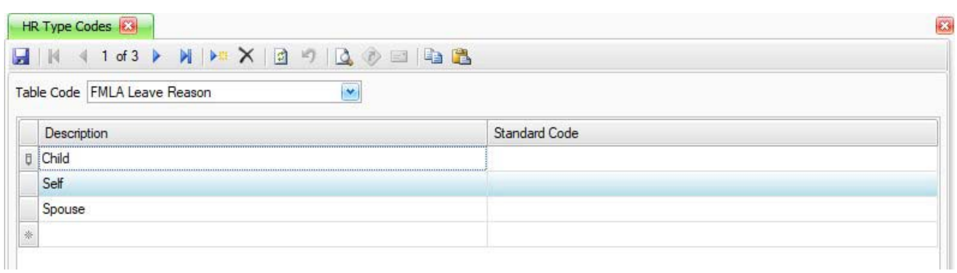
FMLA Codes

The **FMLA** codes are used on the **FMLA** (page 3-167) tab of the **Individual** setup and maintenance screen. There can be multiple requests per individual and these codes relate to each request. There are several FMLA codes that need to be set up.

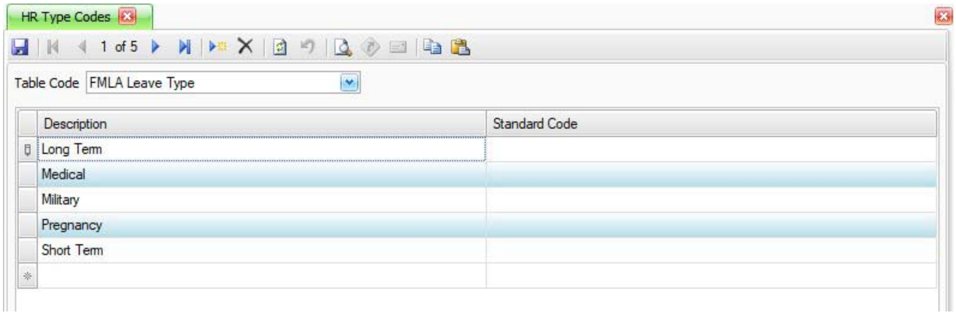
FMLA Delivery Method



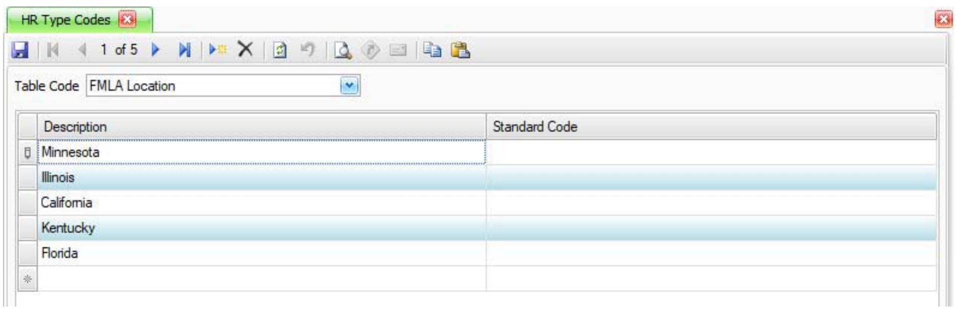
FMLA Leave Reason



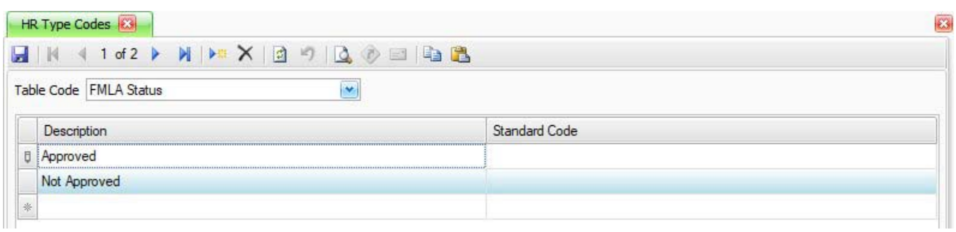
FMLA Leave Type



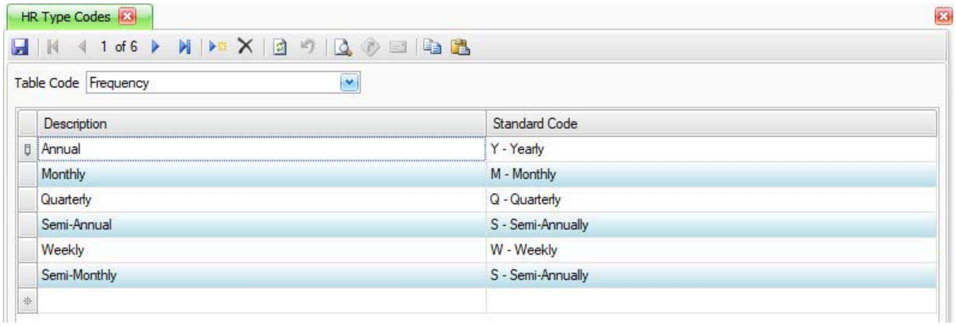
FMLA Location



FMLA Status



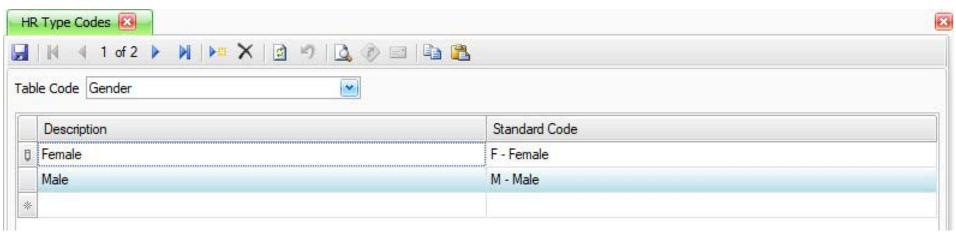
Frequency



Frequency Type Codes are used by the **Life** (page 3-123), **Health** (page 3-115), **Retirement Maintenance** (page 3-135), and **Review** forms.

1. Enter the **Description** as desired.
2. Select the **Standard Codes** that match the required Standard Codes.

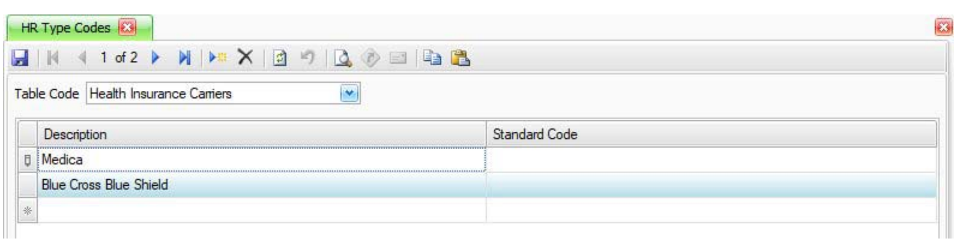
Gender



Gender Type Codes are used by a variety of reports, including the EEO, VETS-4212, and DOL.

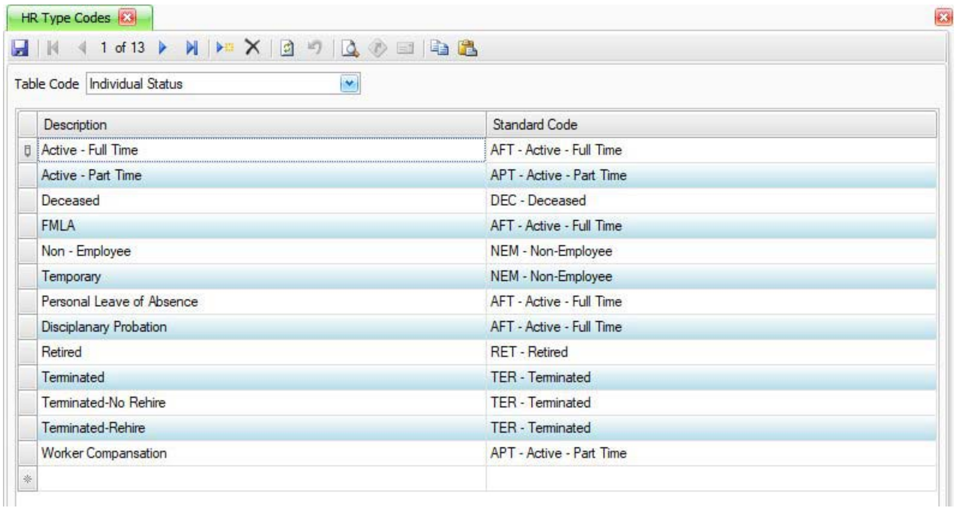
1. Enter the **Description** as desired.
2. Select the **Standard Code** to map back to **F** or **M**. You may want to set up an “Unknown” gender, to track individuals whose gender is unknown at the time of initial processing.

Health Insurance Carriers



Health Insurance Carriers are used in the **Health Plans** (page 3-115) function.

Individual Status

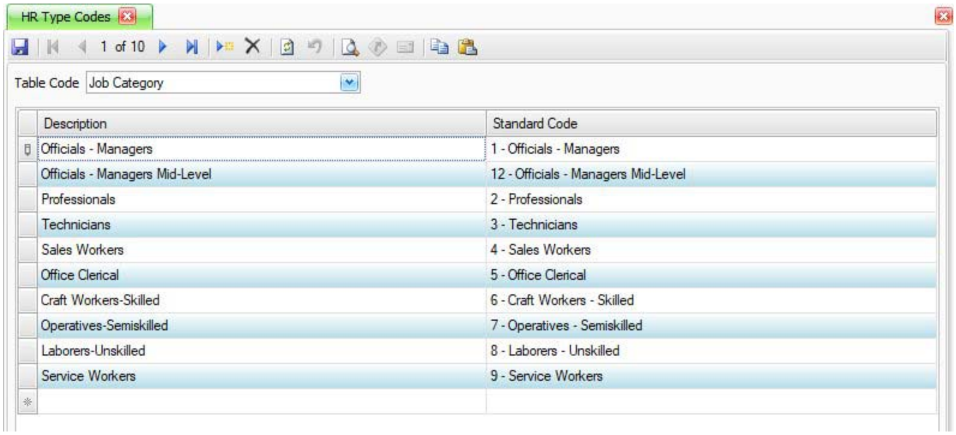


Description	Standard Code
Active - Full Time	AFT - Active - Full Time
Active - Part Time	APT - Active - Part Time
Deceased	DEC - Deceased
FMLA	AFT - Active - Full Time
Non - Employee	NEM - Non-Employee
Temporary	NEM - Non-Employee
Personal Leave of Absence	AFT - Active - Full Time
Disciplinary Probation	AFT - Active - Full Time
Retired	RET - Retired
Terminated	TER - Terminated
Terminated-No Rehire	TER - Terminated
Terminated-Rehire	TER - Terminated
Worker Compansation	APT - Active - Part Time

Individual Status is updated for an Individual on the **Position** (page 3-159) tab of the **Individuals** maintenance screen. It determines which individuals are included on most of the reports, including the DOL, EEO, I9 Renewal, VETS-4212, and Longevity reports.

1. Enter the **Description** as desired.
2. Select the **Standard Code** that matches the required standard as determined by reporting requirements.

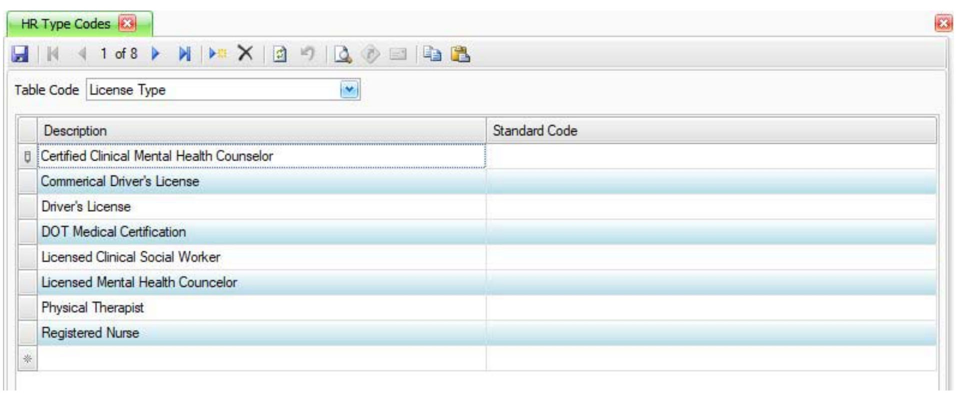
Job Category



Job Categories are used on the **Positions** (page 3-85) maintenance screen. They are used by the EEO and DOL reports.

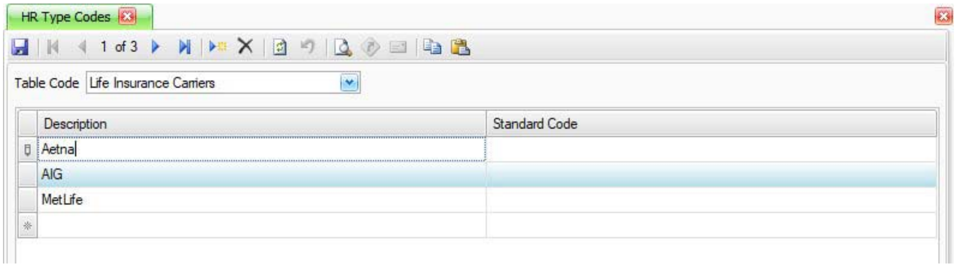
1. Enter the **Description** as desired.
2. Select the **Standard Code** that matches the required standard as determined by reporting requirements.

License Type



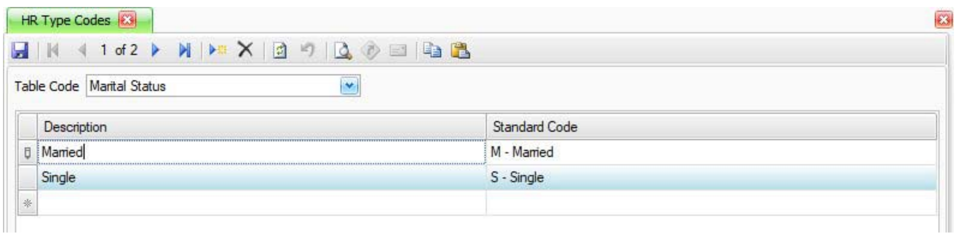
License Type is used in the **Licenses** (page 3-164) tab of the **Individual** setup and maintenance screen. The **Licenses** tab tracks various licenses that each Individual has.

Life Insurance Carriers



Life Insurance Carriers are used in the **Life Insurance Plans** (page 3-123) function.

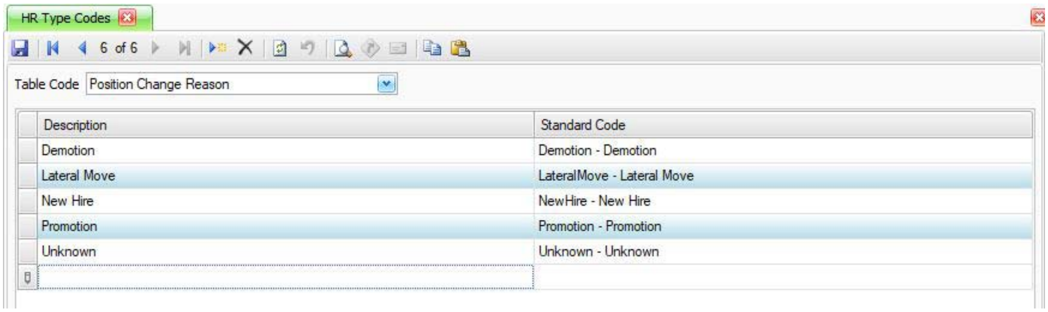
Marital Status



Marital Status is used for the interface to TRAVERSE Payroll, and is used on the **General** (page 3-154) tab of the **Individuals** maintenance screen.

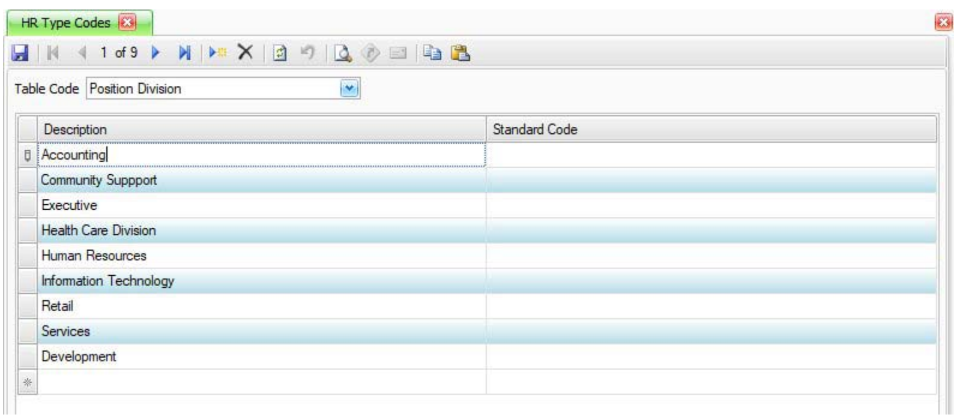
1. Enter the **Description** as desired.
2. Select the **Standard Code** that matches the standard codes on this screen. You may want to set up an “Unknown” status to track individuals whose Marital Status is unknown at the time of initial processing.

Position Change Reason



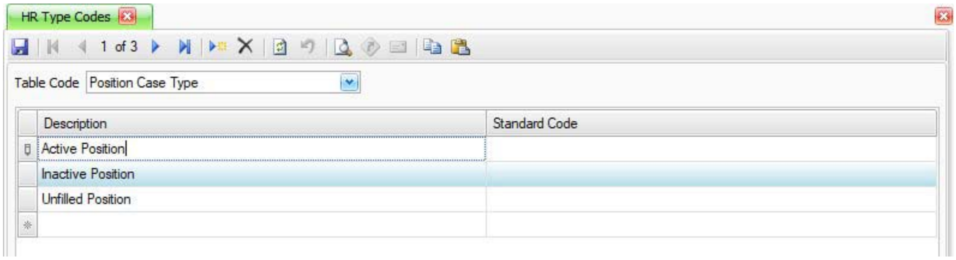
1. **Position Change Reason** Type Codes are used on the **Position** (page 3-159) tab of the **Individuals** maintenance function.
2. Select the **Standard Code** that matches the standard codes on this screen. You may want to set up an "Unknown" status to track individuals whose position change reason is unknown at the time of initial processing.

Position Division



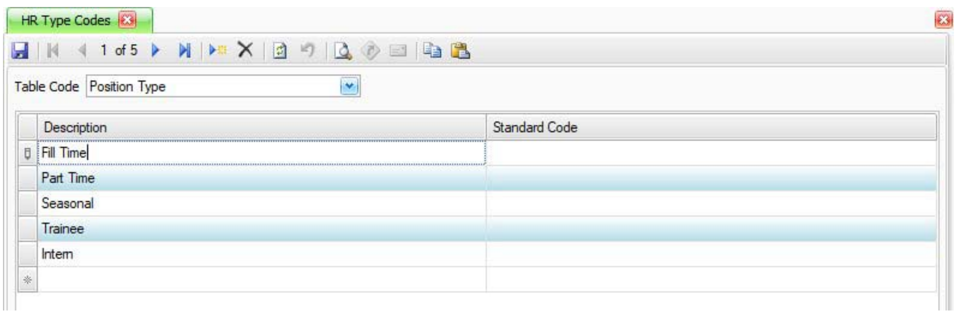
Position Division Type Codes are used in the **Positions** (page 3-85) maintenance function.

Position Case Type



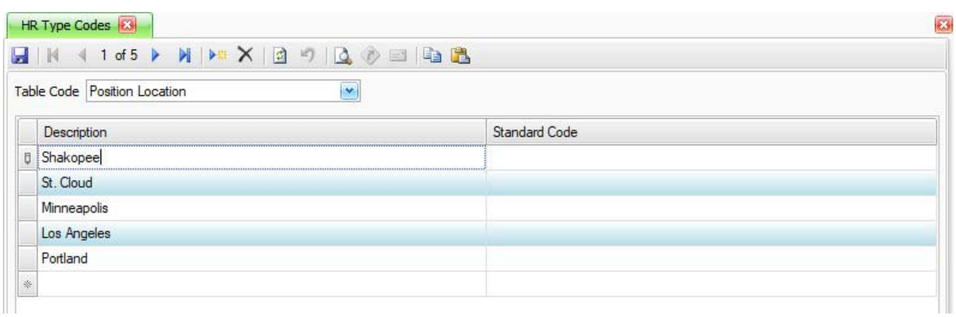
Position Case Type Codes are used in the **Positions** (page 3-85) maintenance function.

Position Type



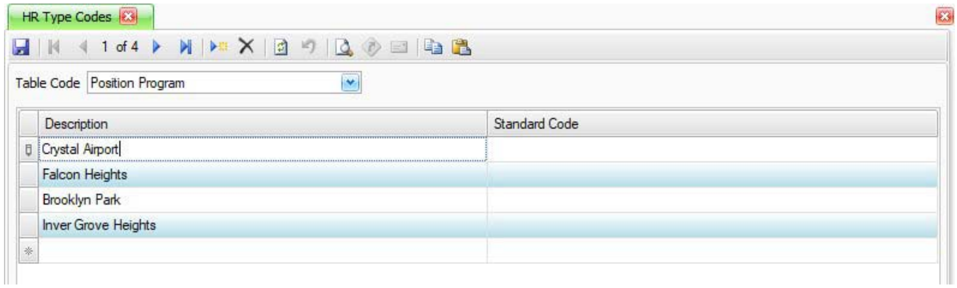
Position Type Codes are used in the **Positions** (page 3-85) maintenance function.

Position Location



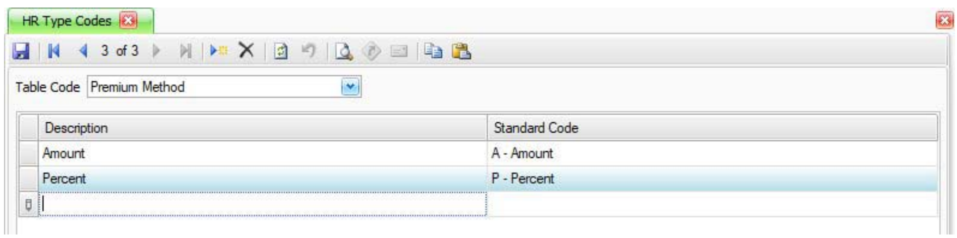
Position Location Type Codes are used in the **Positions** (page 3-85) maintenance function.

Position Program



Position Program Type Codes are used in the **Positions** (page 3-85) maintenance function.

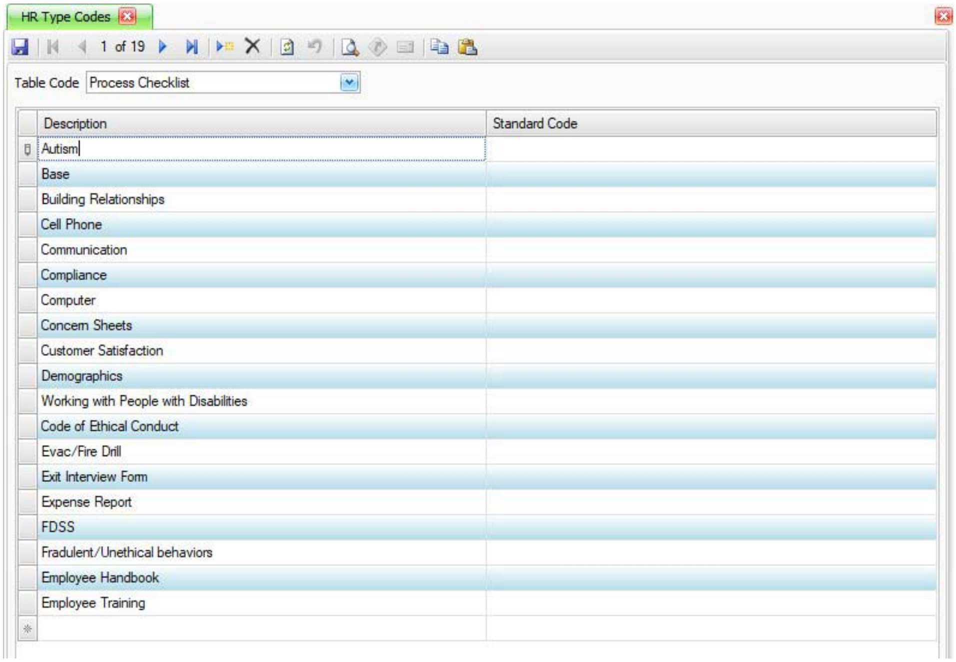
Premium Method



Premium Method is used in the **Retirement Tab** (page 3-173) in **Individuals** maintenance.

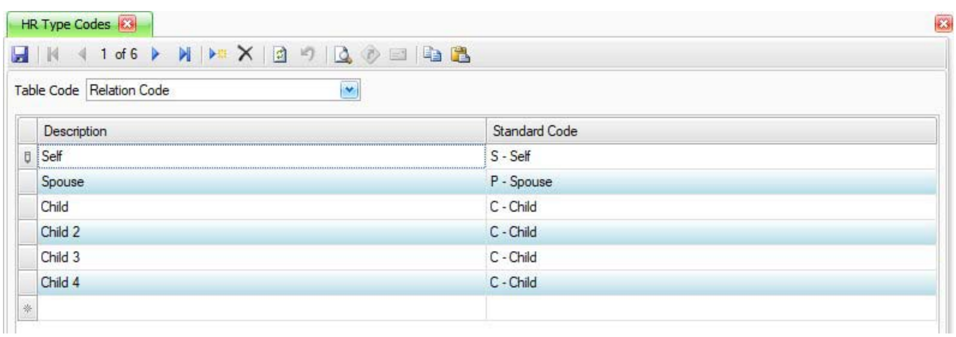
1. Enter a Premium Method **Description**.
2. Choose a **Standard Code** from the drop down list.

Process Checklist



Process Checklist Type Codes are used in the **Processes** (page 3-83) maintenance function.

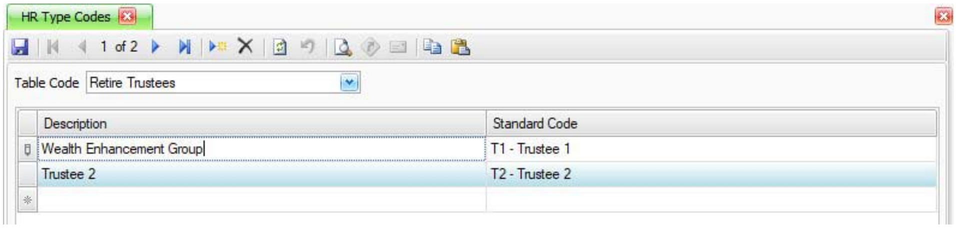
Relation Code



The **Relation Code** is used in the **Individuals** maintenance screen on the **Dependents** (page 3-187) tab.

1. Enter a Relation Code **Description**.
2. Choose a **Standard Code** from the drop down list.

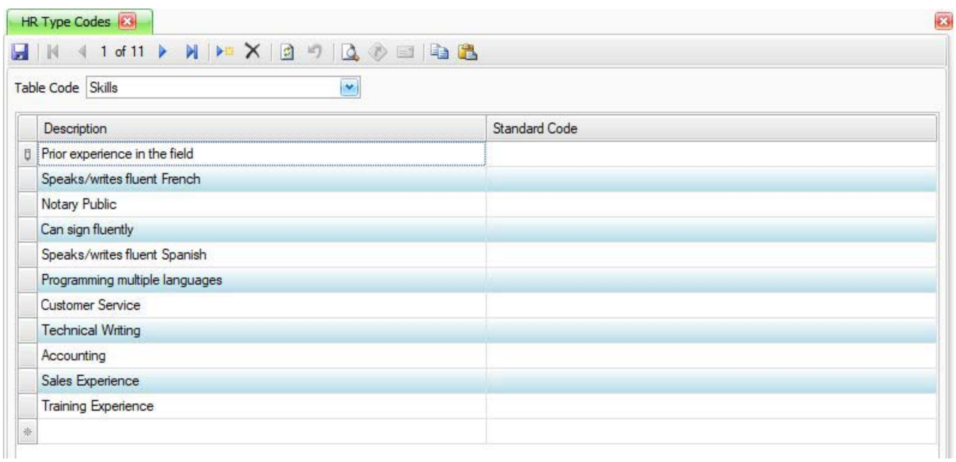
Retirement Trustees



Retirement Trustees Type Codes are used in the **Retirement Plans** (page 3-135) maintenance function.

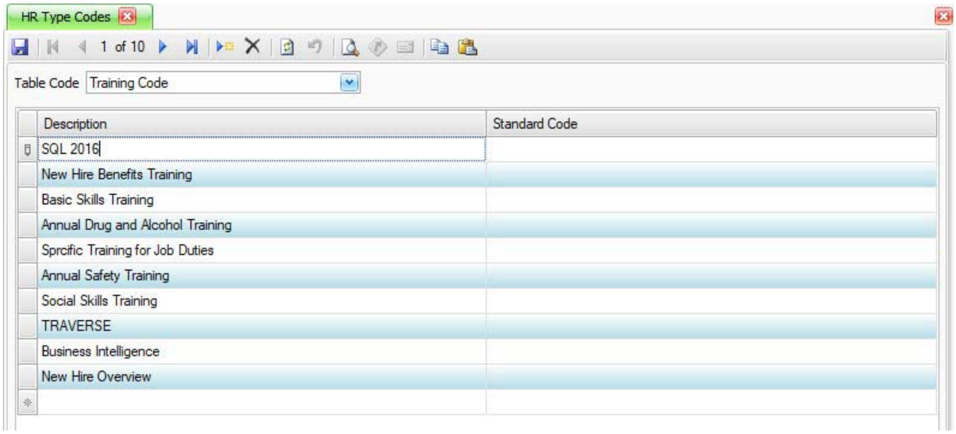
1. Enter a Retirement Trustee **Description**.
2. Choose a **Standard Code** from the drop down list.

Skills



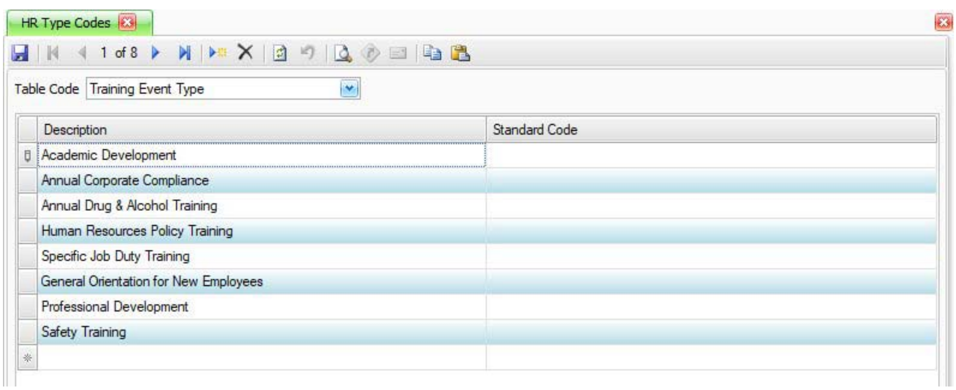
Skills Type Codes are used in the **Individuals** maintenance function on the **Skills/Test** (page 3-162) tab.

Training Code



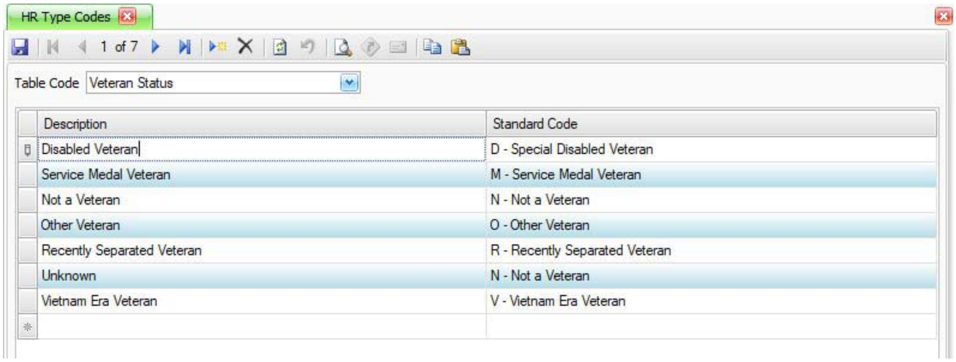
Training Code Type Codes are used in the **Individuals** maintenance function on the **Training** (page 3-165) tab.

Training Event Type



Training Event Type Codes are used in the **Individuals** maintenance function on the **Training** (page 3-165) tab.

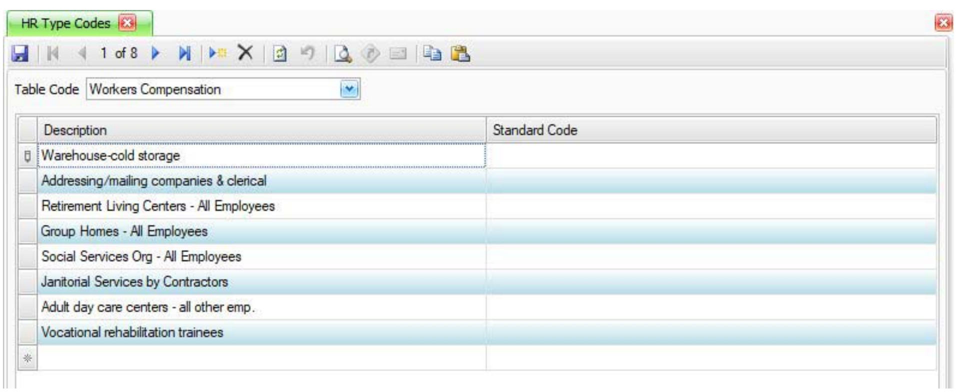
Veteran Status



Veteran Status is entered for each Individual on the **General** (page 3-154) tab of the **Individuals** maintenance screen. It is used by the VETS-4212 report.

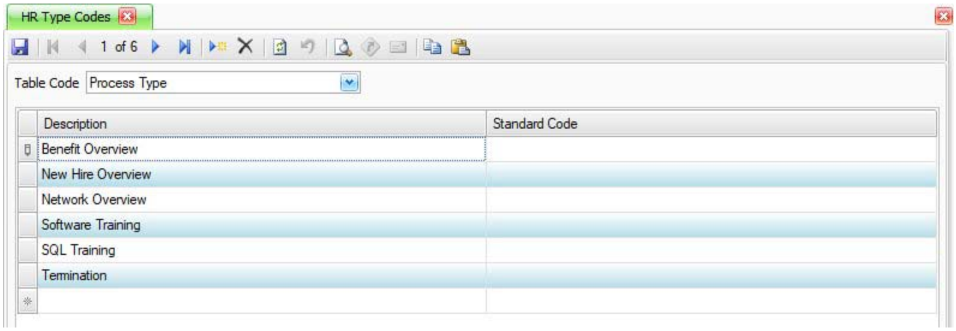
1. Enter a Veteran Status **Description**.
2. Choose a **Standard Code** from the drop down list.

Workers Compensation



Workers Compensation Type Codes are used in the **Positions** (page 3-85) maintenance function.

Process Type



Process Type Codes are used in the **Processes** (page 3-83) maintenance function.

JOB TITLES

Job Titles are used by a number of reports, including the Longevity Report. They also are fed to TRAVERSE Payroll.

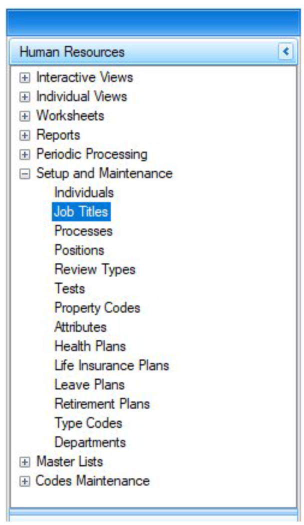
The first step is to set up the Job Categories in the Type Codes maintenance screen (page 3-68) on the Setup and Maintenance menu. Selecting Job Category from the Table Code drop-down list.

The next step is to create or update a Job Title. This is done in Job Titles maintenance under Setup and Maintenance.

To set up **Job Titles**, follow these steps:

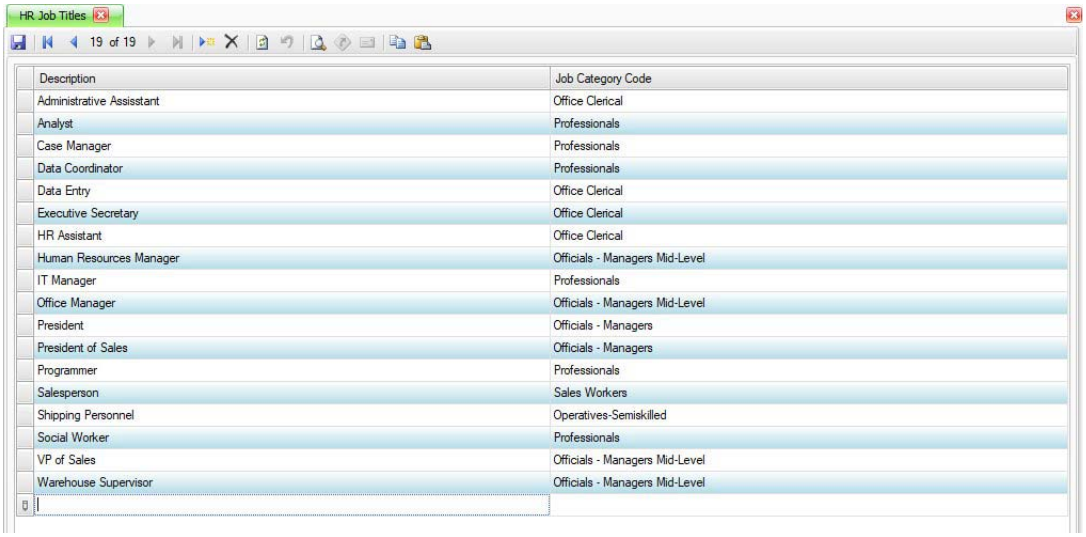
1. Select **Job Titles** from the **Setup and Maintenance** menu.

Job Titles Menu



2. The **Job Titles** screen appears.

Job Titles Screen



Description	Job Category Code
Administrative Assistant	Office Clerical
Analyst	Professionals
Case Manager	Professionals
Data Coordinator	Professionals
Data Entry	Office Clerical
Executive Secretary	Office Clerical
HR Assistant	Office Clerical
Human Resources Manager	Officials - Managers Mid-Level
IT Manager	Professionals
Office Manager	Officials - Managers Mid-Level
President	Officials - Managers
President of Sales	Officials - Managers
Programmer	Professionals
Salesperson	Sales Workers
Shipping Personnel	Operatives-Semiskilled
Social Worker	Professionals
VP of Sales	Officials - Managers Mid-Level
Warehouse Supervisor	Officials - Managers Mid-Level

3. Click the **New Record** button on the toolbar to add a new job title **Description**.
4. Enter a new job title **Description**.

Maint

5. Select a **Job Category Code**.
6. Click the **Save** button on the toolbar to save your changes.

Task Summary

To edit a Job Title, follow these steps:

1. Select a Job Title **Description** to edit.
2. Edit the selected **Description**.
3. Click the **Save** button on the toolbar to save your changes.

To remove a Job Title, follow these steps:

1. Select the Job Title.
2. Click the **Delete** button on the toolbar .

Producing a Job Titles List

Use the **Job Titles List** function to produce a list of information you set up in the Job Titles function (page 3-79) on the Setup and Maintenance menu.

To produce the **Job Titles List**, follow these steps:

1. Select the **Print Preview** button to preview the Job Titles.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Job Titles List

Continental Products Unlimited
HR Job Titles

Page 1

Description	Job Category Code
Administrative Assistant	Office Clerical
Analyst	Professionals
Case Manager	Professionals
Data Coordinator	Professionals
Data Entry	Office Clerical
Executive Secretary	Office Clerical
HR Assistant	Office Clerical
Human Resources Manager	Officials - Managers Mid-Level
IT Manager	Professionals
Office Manager	Officials - Managers Mid-Level
President	Officials - Managers
President of Sales	Officials - Managers
Programmer	Professionals
Salesperson	Sales Workers
Shipping Personnel	Operatives-Semiskilled
Social Worker	Professionals
VP of Sales	Officials - Managers Mid-Level
Warehouse Supervisor	Officials - Managers Mid-Level

10/11/2017 2:42 PM **Kent.Heitkamp**

PROCESSES

The **Processes** function allows you to set up any number of new processes with checklist items and Individuals responsible for each item.

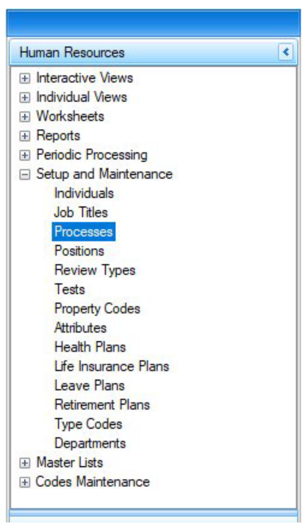
The first step is to set up the Process Checklist items. This is done on the Type Codes maintenance screen (page 3-73) from Setup and Maintenance by selecting Process Checklist from the Table Code drop-down list.

The next step is to create or update a process. This is done in Processes maintenance under Setup and Maintenance.

To set up **Processes**, follow these steps:

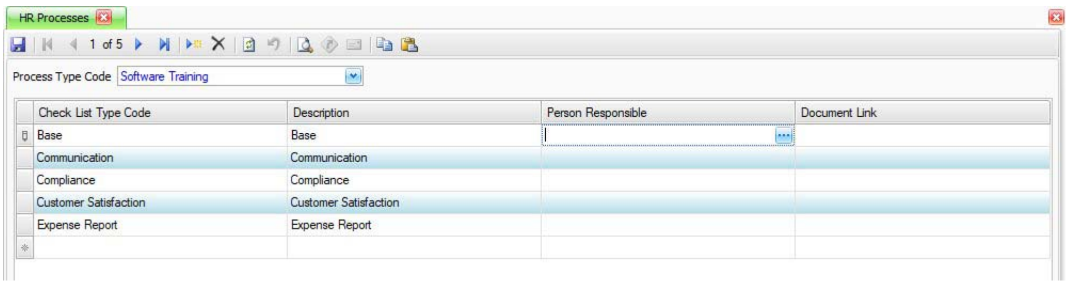
1. Select **Processes** from the **Setup and Maintenance** menu.

Processes Menu



2. The **Processes** screen appears.

Processes Screen



Maint

3. Select a **Process Type Code** from the drop-down list.
4. Click the **New Record** button on the toolbar to add a Checklist item.

Maint

5. Select or edit the **Check List Type Code**.
6. Accept or edit the **Description**.
7. Select the **Person Responsible** from the drop-down list, as applicable.
8. If applicable, Browse to a document to link it to the checklist item in the **Document Link** column.
9. Click the **Save** button on the toolbar to save your changes.

Task Summary

To edit a Process, follow these steps:

1. Select a Process Type Code to edit.
2. Edit the **Check List Type Code**, **Description**, **Person Responsible**, and **Document Link** where appropriate.
3. Click the **Save** button on the toolbar to save your changes.

To remove a Process, follow these steps:

1. Select the **Process Type Code** to delete.
2. Click the **Delete** button on the toolbar.

To remove a Checklist item, follow these steps:

1. Select the Check List Type Code to delete.
2. Click the **Delete** button on the toolbar.

POSITIONS

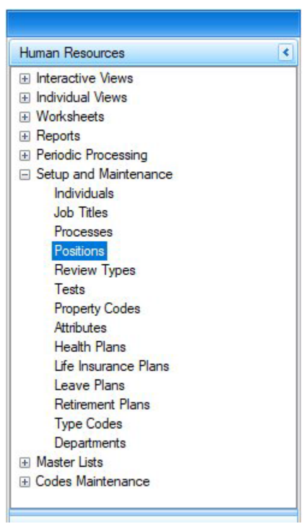
The **Positions** function and reports allow you to set up Positions within your company. Positions are established within Departments and Work Locations and are assigned to Individuals, who inherit certain payroll and organizational data from the assignment, such as Department, Work Location, Manager, Worker Compensation Code, Job Title and Job Category. If a supervisor leaves and a new employee is assigned to that position, there is no need to go and update all of the people under that supervisor, as it will be updated through the Positions screen using the Apply button.

Reports can be printed to see which Positions are filled or unfilled, or which are active or inactive. The reports can be sorted by Position Number, Description, Supervisor, Hours Budgeted, Salary Budgeted, Position Type, Department ID, Individual ID or Name.

To set up **Positions**, follow these steps:

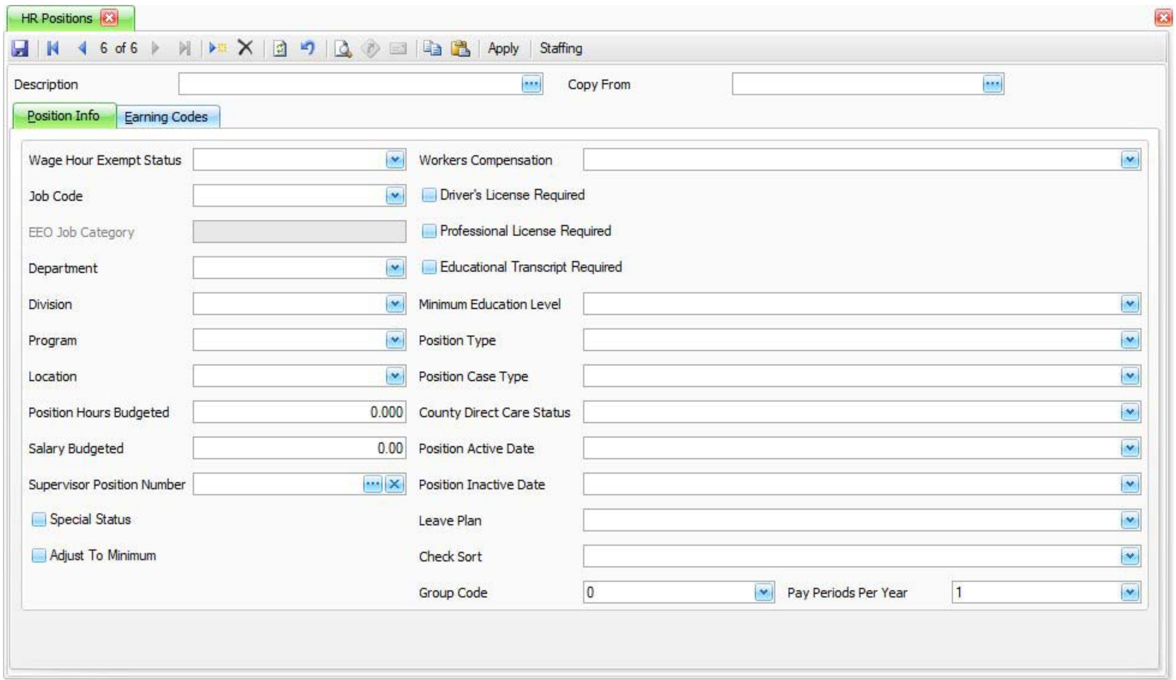
1. Select **Positions** from the **Setup and Maintenance** menu.

Positions Menu



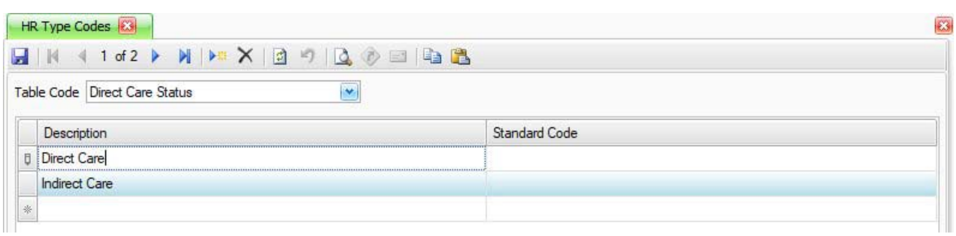
2. The **Positions** screen appears.

Positions Screen

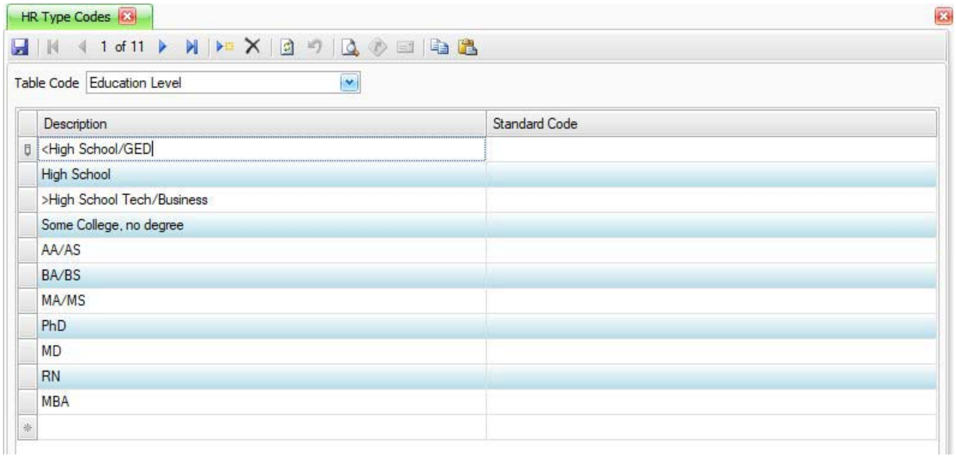


3. The first step is to set up the codes used in the positions screen in **Type Codes**. For more information, see Type Codes maintenance (page 3-59).

County Direct Care Status

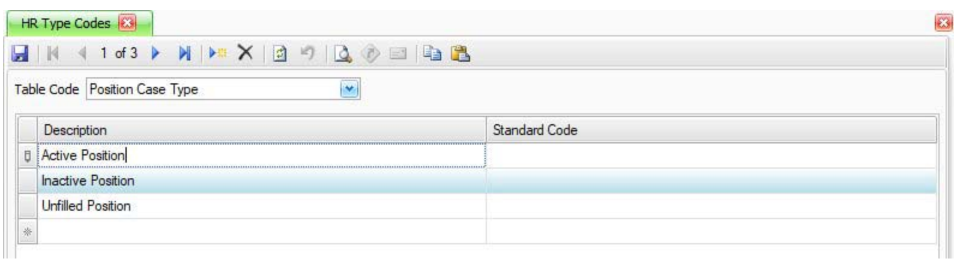


Education Level



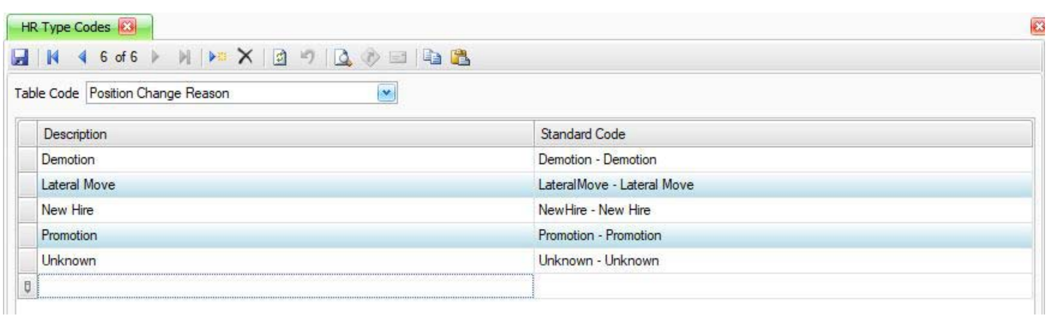
Description	Standard Code
<High School/GED	
High School	
>High School Tech/Business	
Some College, no degree	
AA/AS	
BA/BS	
MA/MS	
PhD	
MD	
RN	
MBA	

Position Case Type



Description	Standard Code
Active Position	
Inactive Position	
Unfilled Position	

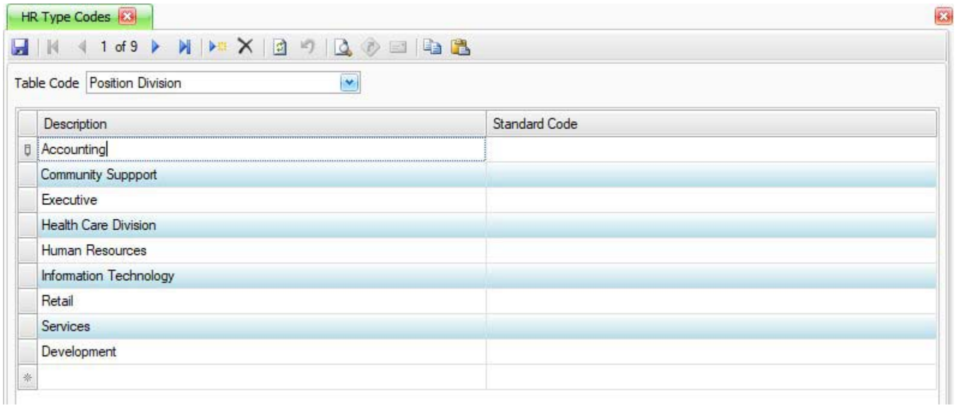
Position Change Reason



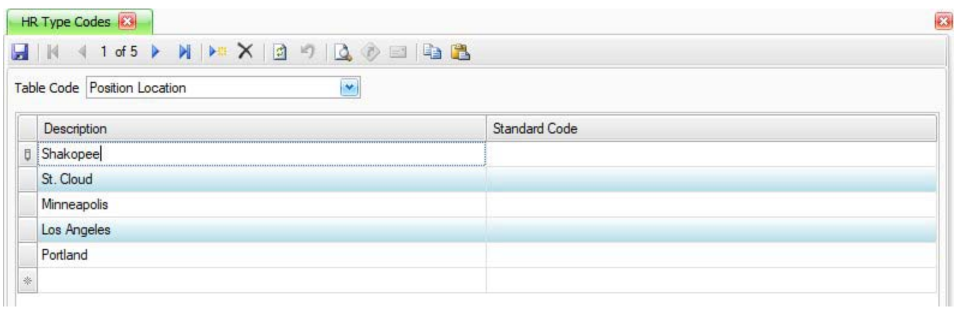
Description	Standard Code
Demotion	Demotion - Demotion
Lateral Move	LateralMove - Lateral Move
New Hire	NewHire - New Hire
Promotion	Promotion - Promotion
Unknown	Unknown - Unknown

Position Change Reason is used in the Individuals maintenance screen, but should be set up at the same time as the Position codes.

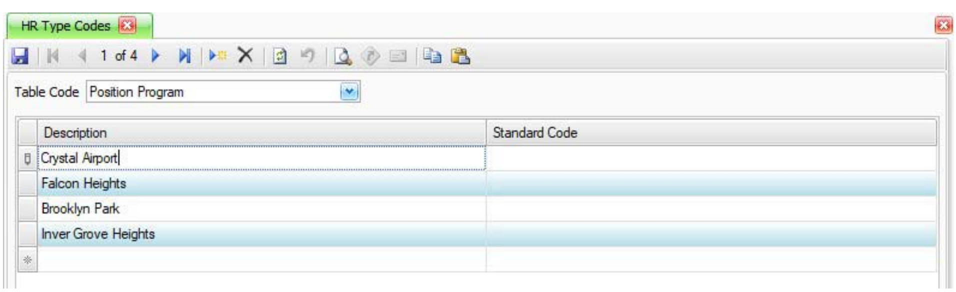
Position Division



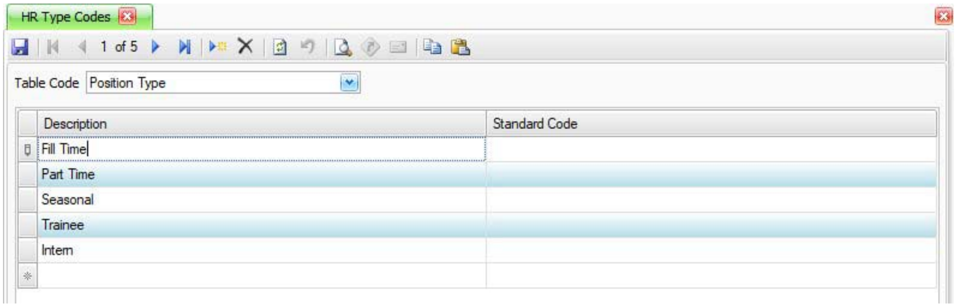
Position Location



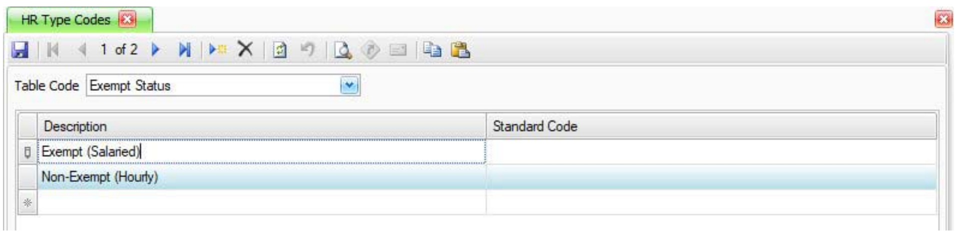
Position Program



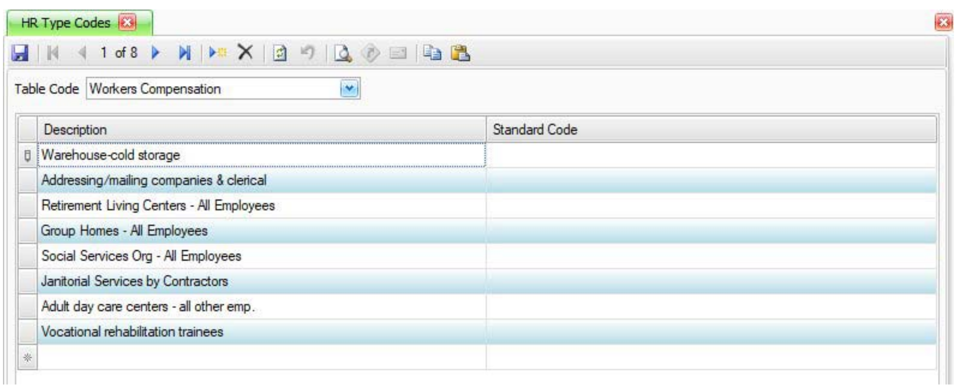
Position Type



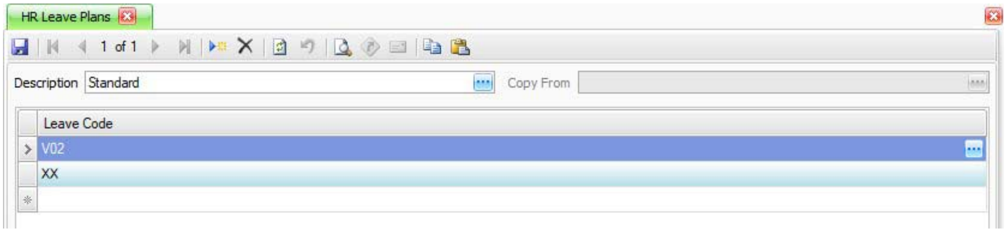
Wage/Hour Exempt Status



Workers Compensation



Leave Plan Maintenance

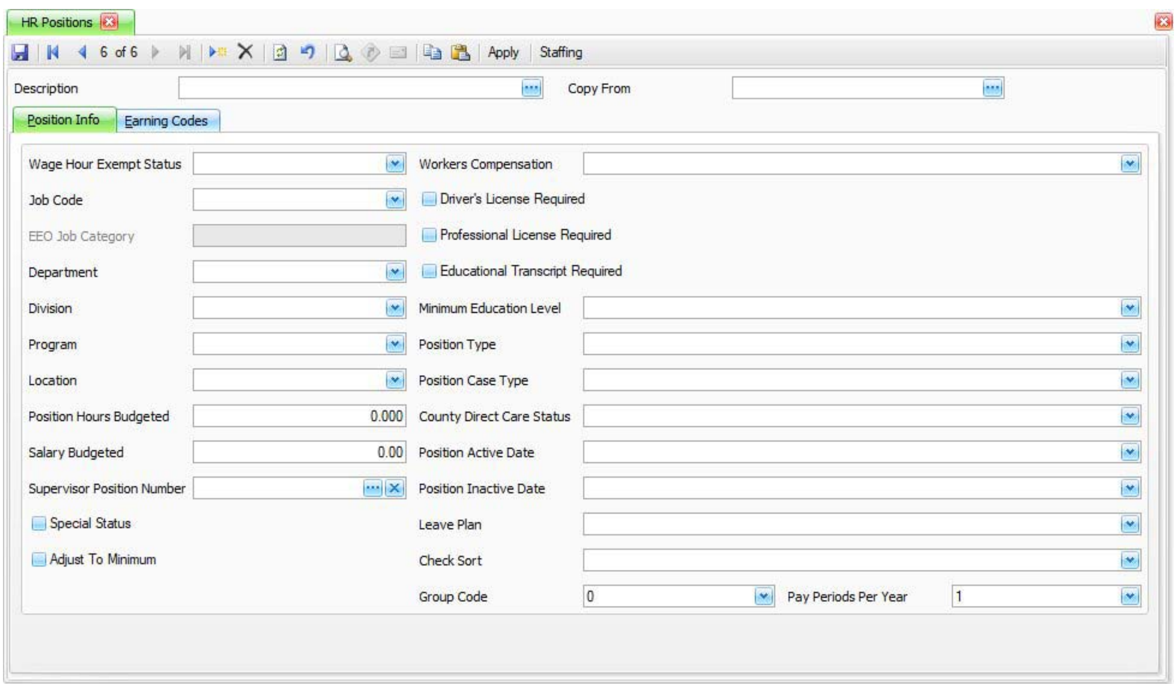


Set up the **Leave Plans** by going to **Leave Plans** maintenance under **Setup and Maintenance**. Click the **New Record** button on the toolbar to enter a new **Leave Plan Code**, or use the drop-down list to edit a current leave plan.

Position Maintenance

The next step is to set up the Positions. Go to the Positions maintenance screen from Setup and Maintenance.

Positions Screen



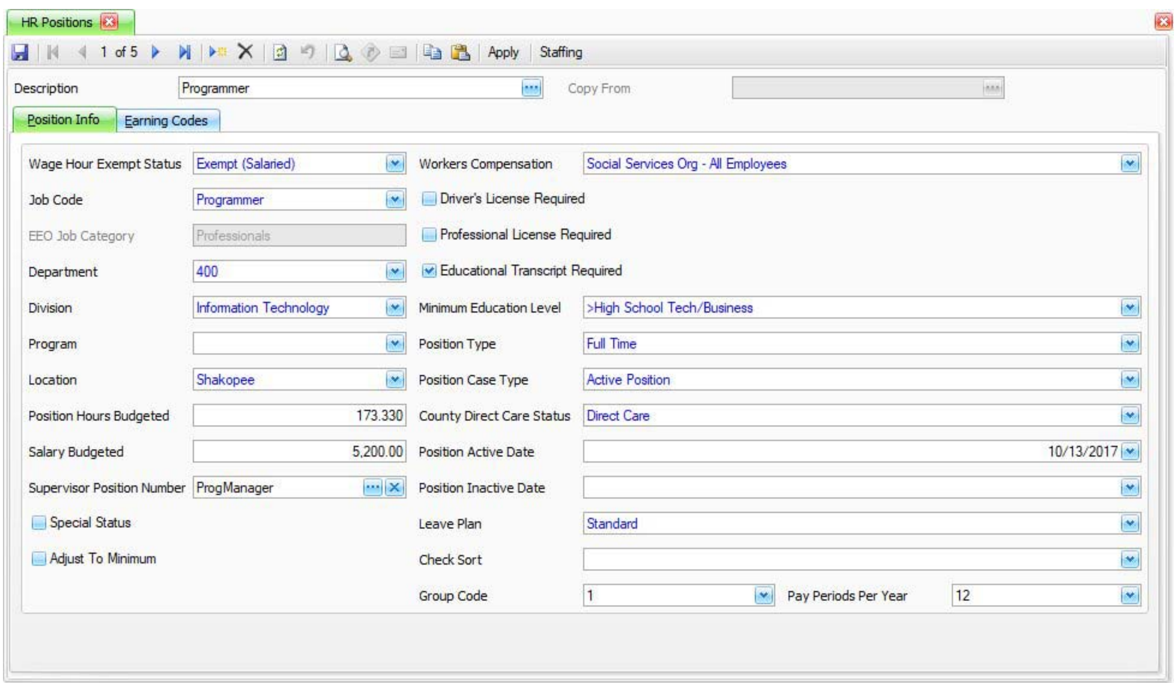
4. Click the **New Record** button  on the toolbar to enter a new Position **Description**, or select a **Description** from the drop-down list.

5. When entering a new Position, the **Copy From** field is displayed. Select an existing Position to copy information from, or skip the field to enter all information for the new Position.

   When you copy from an existing Position all fields, except Default Earn Code, are copied to the new Position.

6. On the Position Info tab:

Positions Screen Position Info Tab



Maint 7. Select the **Wage Hour Exempt Status** of the position from the drop-down list.

Maint 8. Select a **Job Code** from the drop-down list.

9. The **EEO Job Category** field is read-only, and fills automatically when you select the job code.

Maint 10. Select a **Department**, as applicable.

Maint 11. Select a **Division** as applicable.

Maint 12. Select a **Program** as applicable.

Maint

13. Select a **Location** as applicable.
14. Enter the number of **Position Hours Budgeted** for this position.
15. Enter the **Salary Budgeted** for this position. For hourly positions, enter the expected hours budgeted * hourly rate. (Amount entered should be on a monthly or annual basis.)
16. Select a **Supervisor Position Number** as applicable. Select the “X” button to clear the field.

    The Supervisor selection is used when the **Apply** button is selected to update the Manager field in the Individual setup.

17. To exclude certain groups, such as disabled clients, from EEO reports, mark the **Special Status** check box.
18. Mark the **Adjust to Minimum** check box if you want the system to automatically adjust earnings to minimum wage if regular earnings plus reported tips do not amount to minimum wage.

Maint

19. Select a **Workers Compensation** code from the drop-down list, if applicable.
20. Mark the appropriate check box if the position requires a **Driver's License Required**, **Professional License Required**, and/or **Educational Transcript Required**.

Maint

21. Select a **Minimum Educational Level**, as required.

Maint

22. Select a **Position Type**.

Maint

23. Select a **Position Case Type**, as necessary.

Maint

24. Select a **County Direct Care Status**, as necessary.
25. Enter the **Position Active Date**.
26. Enter the **Position Inactive Date**, as necessary.

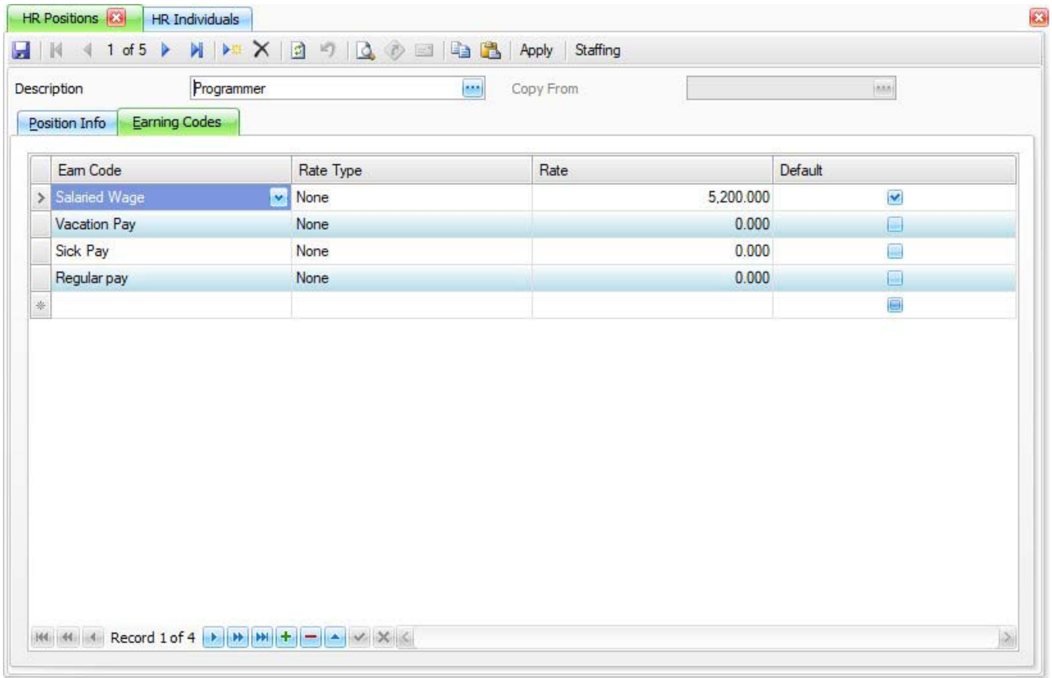
Maint

27. Select a **Leave Plan**.

Maint

28. Select a **Check Sort** option, as necessary.
29. Select a **Group Code**.
30. Enter the number of **Pay Periods Per Year**.

Positions Screen Earning Codes Tab



1. Select the **Earning Codes** tab.

    Enter or update the following fields:

2. Select the **Earning Code**(s) to be used for this Position for Individuals during time ticket entry in the Payroll Transactions function and for Salaried Employees when the Include Salaried Wages box is selected in the Payroll Calculate Checks function. Select the Default box to indicate the Default Earning Code. Only Earning Codes that have been assigned to the Position and Individual in the Earnings Codes tab, or the Copy Earning Codes dialog box (page 3-41) in the Earning Codes function (page 3-37) on the Codes Maintenance menu, are valid options for this field.

NOTE: At least one valid Earning Code must be set up for each Position and Individual in order to enter Payroll Transactions and/or Calculate Checks for that Individual.

3. The **Description** of the Earning Codes added is displayed.
4. Select the **Rate Type** to override the default rate calculation;

- **None** - Calculate using the Hourly Rate entered into the Rate column and Individual setup, and use the multiplier from the Earning Code setup.
- **Percent of Regular Rate** - Calculate using the Hourly Rate entered into the Individual, and multiply it by the percentage entered into the Rate field.
- **Override Regular Rate** - Use the Hourly Rate entered into the Rate field.

Example: The Hourly Rate for the Employee is set up as 16.94. Choosing an Earning Code of 'REG', with the Rate Type of None, will pay the person $16.94 per hour (their standard rate.) Choosing the 'OVT' earning code will pay them $25.41 per hour, with the Rate Type of Percent of Regular Rate with 150 entered into the Rate field (150% of $16.94.) Choosing 'P01' will pay them $18.67 per hour, with the Rate Type of Override Regular Rate, with 18.67 entered into the Rate field (overriding the normal hourly Rate.)

5. Enter the earning **Rate**. If you are entering a salary amount, it should be the amount for a pay period.
6. Select the **Default** box for the Earning Code you want as the Default code when entering Payroll Transactions, or Calculating Checks for Salaried Employees.
7. Press the **Add Record** button (+) at the bottom of the screen to add additional earning codes.
8. Select a command button to do the following functions:

Command Buttons

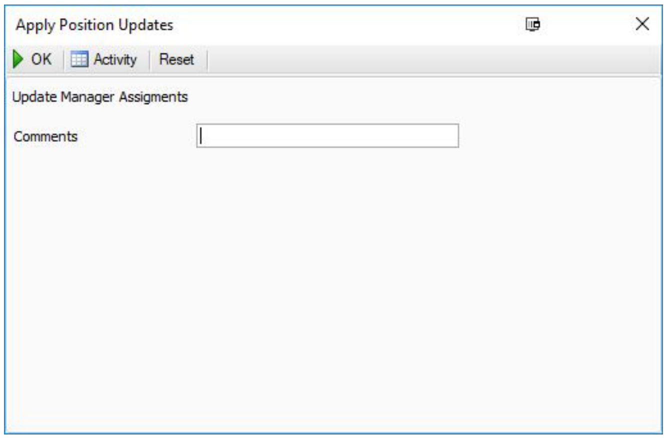
Name	Description
Apply	Select the **Apply** button to update the Individual Manager with the Individual assigned to the Supervisor Position Number.
Staffing	Select the **Staffing** button to open the Positions Assignment View (page 5-13) to see all Individuals assigned to the selected Position.

Apply Button

Select the **Apply** button to update the Individual setup, Manager field with the Supervisor Position Number selected on the Position displayed.

The purpose of this function is to have the ability to update multiple Individuals when the Supervisor for a Position changes. The Apply Position Updates will only update the Individual when the Manager field in the Individual setup is different than the Supervisor Position Number selected for the Position, or the Manager field is blank, for all Individuals assigned the Position with the Primary Position check box selected.

Positions Screen - Apply Button



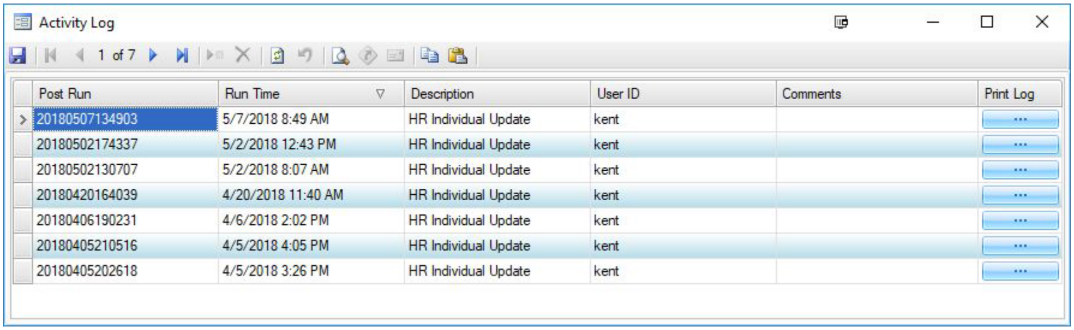
1. Enter **Comments** about the update.
2. Select a command button:

Command Buttons

Name	Description
OK	Select the **OK** button to update the Manager field in the Individual setup with the Individual assigned the Supervisor Position Number selected.
Activity	View the **Activity Log** dialog box.
Reset	Reset the values back to the original settings.

3. When the update has completed the Update Individuals Log appears.

Apply Activity Dialog Box



Post Run	Run Time	Description	User ID	Comments	Print Log
20180507134903	5/7/2018 8:49 AM	HR Individual Update	kent		...
20180502174337	5/2/2018 12:43 PM	HR Individual Update	kent		...
20180502130707	5/2/2018 8:07 AM	HR Individual Update	kent		...
20180420164039	4/20/2018 11:40 AM	HR Individual Update	kent		...
20180406190231	4/6/2018 2:02 PM	HR Individual Update	kent		...
20180405210516	4/5/2018 4:05 PM	HR Individual Update	kent		...
20180405202618	4/5/2018 3:26 PM	HR Individual Update	kent		...

The **Activity Log** dialog box appears when you click **Activity**. The Activity Log dialog box tracks all update activity for administrative purposes. The system assigns each update a run ID.

Post Run - The system generated number used to identify the post appears.

Run Time - The date and time the Apply was made appear.

Description - The Apply description appears.

User ID - The user who performed the Apply appears.

Comments - Comments entered for the Apply appear.

Print Log - to print the Apply log from the selected Apply update.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Update Individual Log

Continental Products Unlimited
Update Individuals Log
Sorted by Individual ID

PAGE 1

Individual ID	Individual Name	Original Manager ID	Original Manager Name	Updated Manager ID	Updated Manager Name
AMK	Kelly, Ann Marie M			LK	Kline, Laurie N
AWS	Soklers, Alan W			LK	Kline, Laurie N
DOUBLA00001	Doubla, Mike K			LK	Kline, Laurie N
JON001	Jonchim, Maria K			LK	Kline, Laurie N
JONES001	Jones, Edward L			LK	Kline, Laurie N
LUK001	Lukas, George W			LK	Kline, Laurie N
TES	Smith, Terry E			LK	Kline, Laurie N

*** End of Report ***

5/7/2018 8:49 AM

Kent.Heitkamp

Task Summary

To edit a Position, follow these steps:

1. Select a Position **Description** to edit.
2. Edit the available fields where appropriate on the Position Info and Earning Codes tabs.
3. Click the **Save** button on the toolbar to save your changes.

To remove a Position, follow these steps:

1. Select the **Position Description** to delete.
2. Click the **Delete** button on the toolbar .

To remove an Earning Codes item, follow these steps:

1. Select the Position **Description** and select the **Earning Codes** tab.
2. Select the **Earning Code** to delete.
3. Click the **Delete** button on the navigation bar at the bottom of the screen.

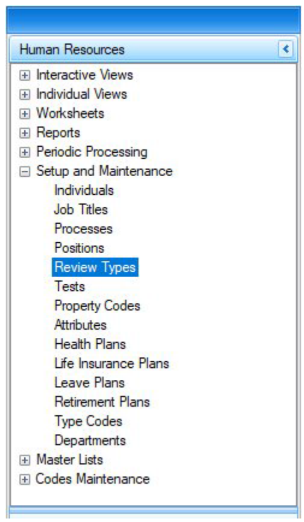
REVIEW TYPES

The TRAVERSE HR application allows you the flexibility to set up a number of **Review Types**, each with their own evaluation criteria and review cycles.

To set up **Review Types**, follow these steps:

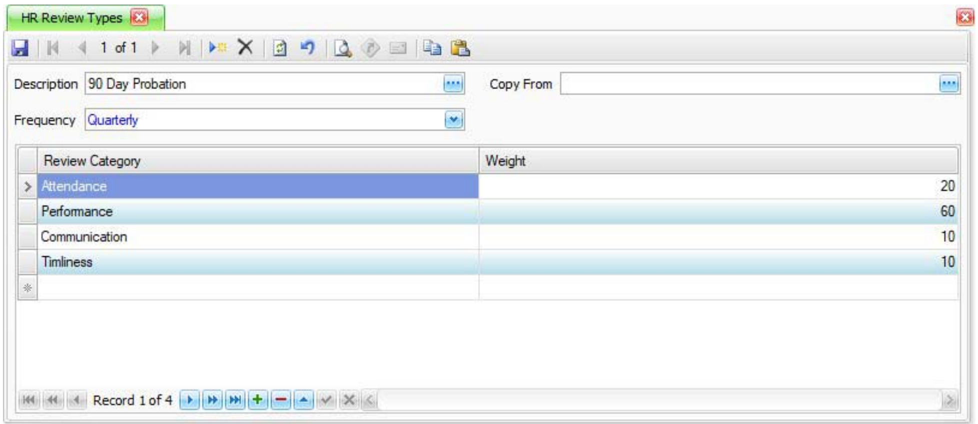
1. Select **Review Types** from the **Setup and Maintenance** menu.

Review Types Menu



2. The **Review Types** screen appears.

Review Types Screen



3. Click the **New Record** button on the toolbar to add a new review type **Description**, or select a **Description** to edit.
4. When entering a new Review Type, the **Copy From** field is displayed. Select an existing Review Type to copy information from, or skip the field to enter all information for the new Review Type.

   When you copy from an existing Review Type all fields are copied to the new Review Type.

Maint

5. Select a **Frequency** for the review type. The Frequency selections are set up using the Frequency selection in the Type Codes function.
6. Press the **Add Record** button ( ) at the bottom of the screen to add a Review Category.
7. Enter or edit a **Review Category**, such as “Attendance” (10 character limit).
8. Enter a numeric **Weight** for the Review Category. The total weight of the categories should equal 100.
9. Click the **Save** button on the toolbar to save your changes.

Task Summary

To edit a Review Type, follow these steps:

1. Select a Review Type **Description** to edit.
2. Edit the **Frequency**, **Review Category**, and **Weight** where appropriate.

3. Click the **Save** button on the toolbar to save your changes.

To remove a Review Type, follow these steps:

1. Select the Review Type **Description** to delete.
2. Click the **Delete** button on the toolbar .

To remove a Review Category item, follow these steps:

1. Select the Review Type **Description**.
2. Select the **Review Category** to delete.
3. Click the **Delete** button on the navigation bar at the bottom of the screen.

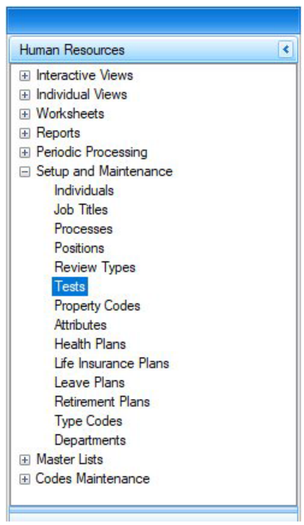
TESTS

Standard **Tests** can be set up and then maintained on each Individual.

To set up **Tests**, follow these steps:

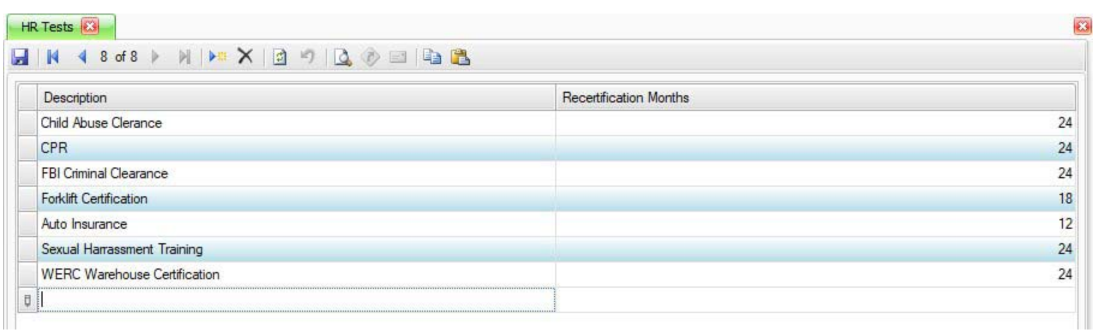
1. Select **Tests** from the **Setup and Maintenance** menu.

Tests Menu



2. The **Tests** screen appears.

Tests Screen



For each test, enter the following:

3. Enter a new test **Description**.

4. Enter the number of months before the individual must be re-certified in the **Recertification Months** column.

Task Summary

To edit a Test, follow these steps:

1. Select a Test **Description** to edit.
2. Edit the **Description**, and **Recertification Months** where appropriate.
3. Click the **Save** button on the toolbar to save your changes.

To remove a Test, follow these steps:

1. Select the Test **Description** to delete.
2. Click the **Delete** button on the toolbar .

Producing a Tests List

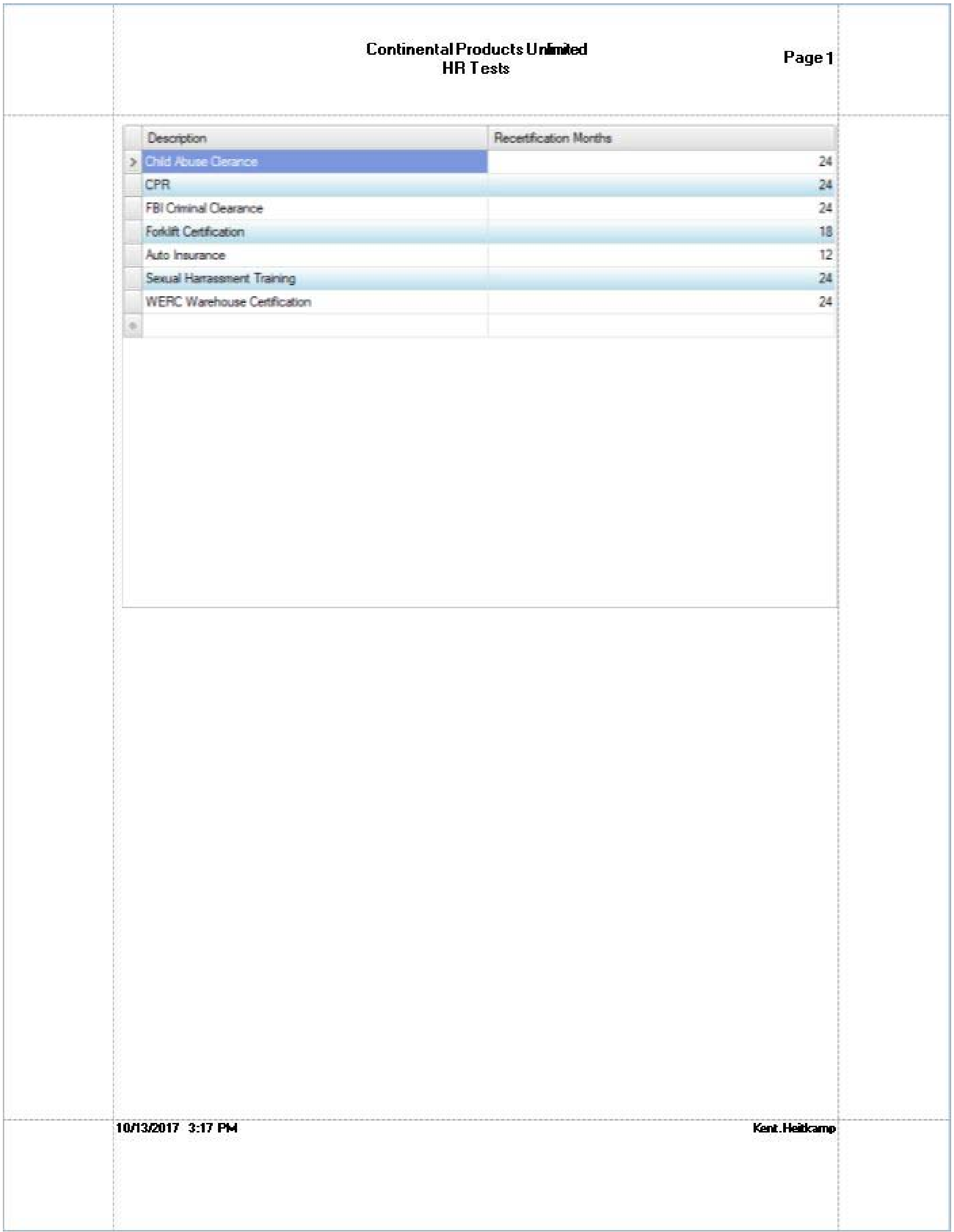
Use the **Tests List** function to produce a list of information you set up in the Tests function (page 3-103) on the Setup and Maintenance menu.

To produce the **Tests List**, follow these steps:

1. Select the **Print Preview** button to preview the Tests.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Tests List



Continental Products Unlimited
HR Tests

Page 1

Description	Recertification Months
Child Abuse Clearance	24
CPR	24
FBI Criminal Clearance	24
Forklift Certification	18
Auto Insurance	12
Sexual Harassment Training	24
WERC Warehouse Certification	24

10/13/2017 3:17 PM

Kent.Heitkamp

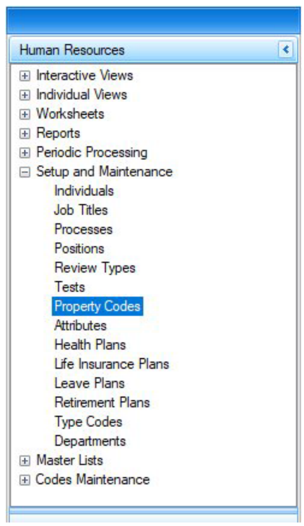
PROPERTY CODES

The **Property Codes** maintenance screen and report allow you to track company property (keys, cell phones, laptops, etc.), as they are assigned to an Individual.

To set up **Property Codes**, follow these steps:

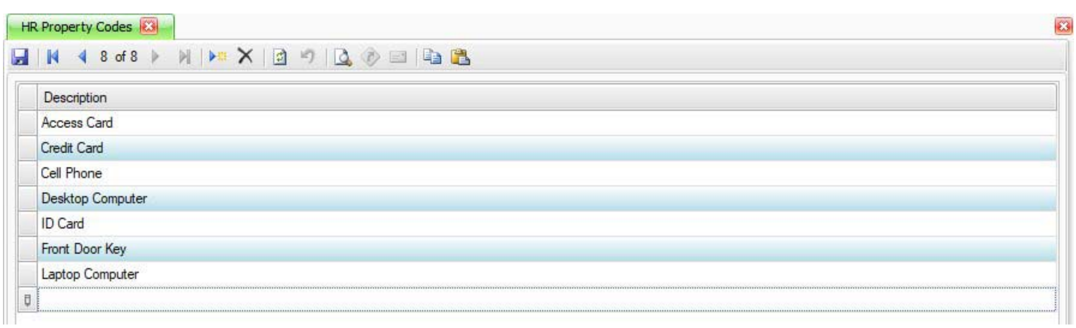
1. Select **Property Codes** from the **Setup and Maintenance** menu.

Property Codes Menu



2. The **Property Codes** screen appears.

Property Codes Screen



3. Click the **New Record** button  to add a new Property code or select a **Property Code Description** to edit.

4. Enter a Property Code **Description**.
5. Click the **Save** button on the toolbar to save your changes.

Task Summary

To edit a Property Code, follow these steps:

1. Select a Property Code **Description** to edit.
2. Edit the **Description**, and **Recertification Months** where appropriate.
3. Click the **Save** button on the toolbar to save your changes.

To remove a Property Code, follow these steps:

1. Select the Property Code **Description** to delete.
2. Click the **Delete** button on the toolbar .

Producing a Property Codes List

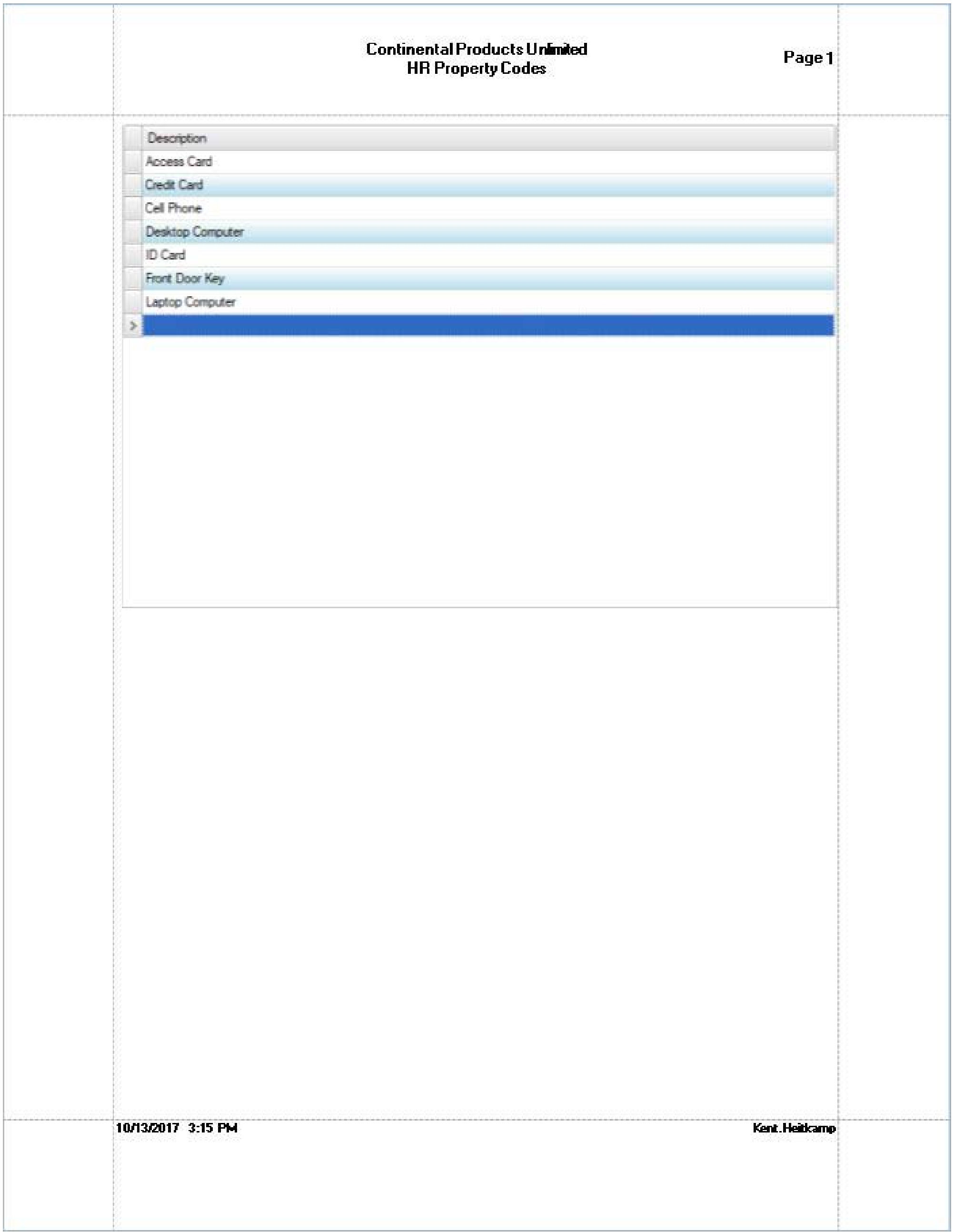
Use the **Property Codes List** function to produce a list of information you set up in the Property Codes function (page 3-107) on the Setup and Maintenance menu.

To produce the **Property Codes List**, follow these steps:

1. Select the **Print Preview** button to preview the Property Codes.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Property Codes List



Continental Products Unlimited
HR Property Codes

Page 1

Description
Access Card
Credit Card
Cell Phone
Desktop Computer
ID Card
Front Door Key
Laptop Computer

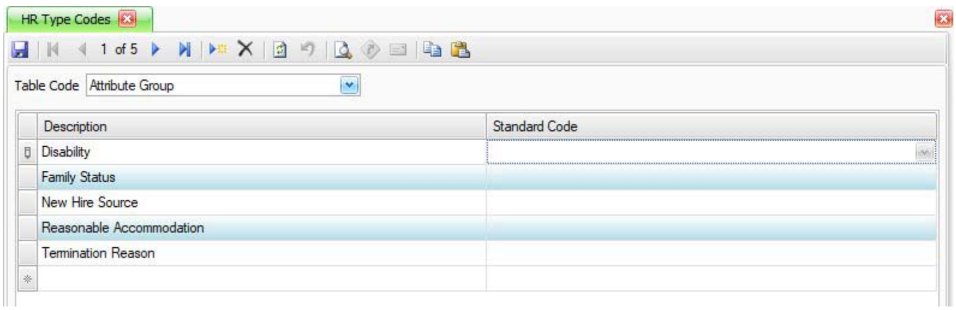
10/13/2017 3:15 PM

Kent.Heitkamp

ATTRIBUTES

Attributes are found on the **Attributes** tab in the **Individual** Maintenance screen. You must first set up the **Attribute Groups** (page 3-61) in the **Type Codes** function, then you may set up the Attributes. There can be multiple Attributes for each Attribute Group.

Attribute Group



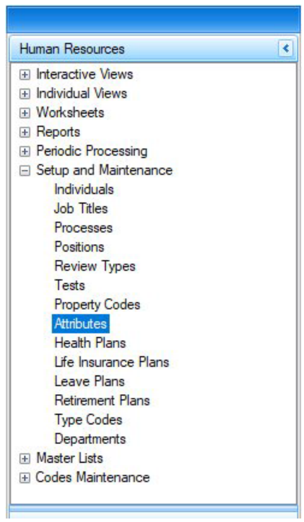
In the **Type Codes** maintenance function, select **Attribute Groups** from the **Table Code** drop-down list.

Enter an **Attribute Group** Type Code. Also enter the longer **Description** of the Attribute Group.

To set up **Attributes**, follow these steps:

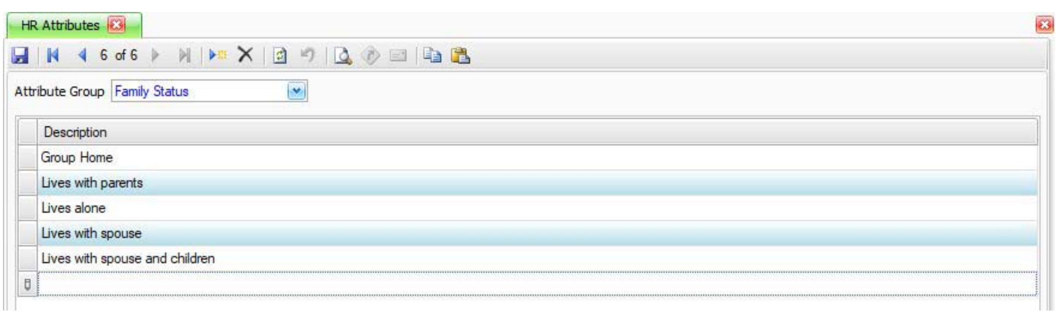
1. Select **Attributes** from the **Setup and Maintenance** menu.

Attributes Menu



2. The **Attributes** screen appears.

Attributes Screen



The attribute groups you set up in the Type Codes function are used in the Attributes maintenance function.

Maint

3. Select an **Attribute Group** from the drop-down list.

For each attribute group:

4. Click the **New Record** button  to add a new Attribute.
5. Enter an Attribute **Description**.

6. Click the **Save** button on the toolbar to save your changes.

Task Summary

To edit an Attribute, follow these steps:

1. Select an **Attribute Group** and **Description** to edit.
2. Edit the **Description** where appropriate.
3. Click the **Save** button on the toolbar to save your changes.

To remove an Attribute, follow these steps:

1. Select the **Attribute Group** or **Description** to delete.
2. Click the **Delete** button on the toolbar .

HEALTH PLANS

There are three Benefit Plan types: Life Insurance, Retirement Plans, and Health Insurance.

After you have set up the **Benefit Type** in Type Code Maintenance, there are two steps that must be followed to set up a new plan before an employee can be enrolled:

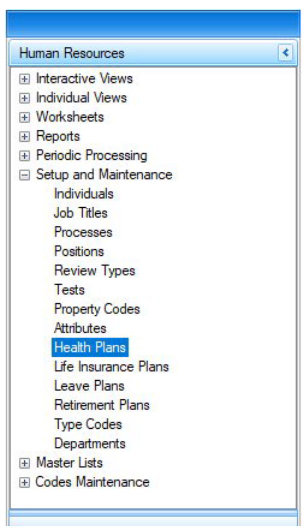
- The company providing the plan (life insurance carrier, health insurance carrier, or retirement plan trustee) must be set up in the Type Codes function.
- The plan details (group number, deduction frequency, waiting period/minimum age, etc.) must be set up.

After this setup has been done, refer to the specific plan under Individuals maintenance to enroll an Individual.

To set up **Health Plans**, follow these steps:

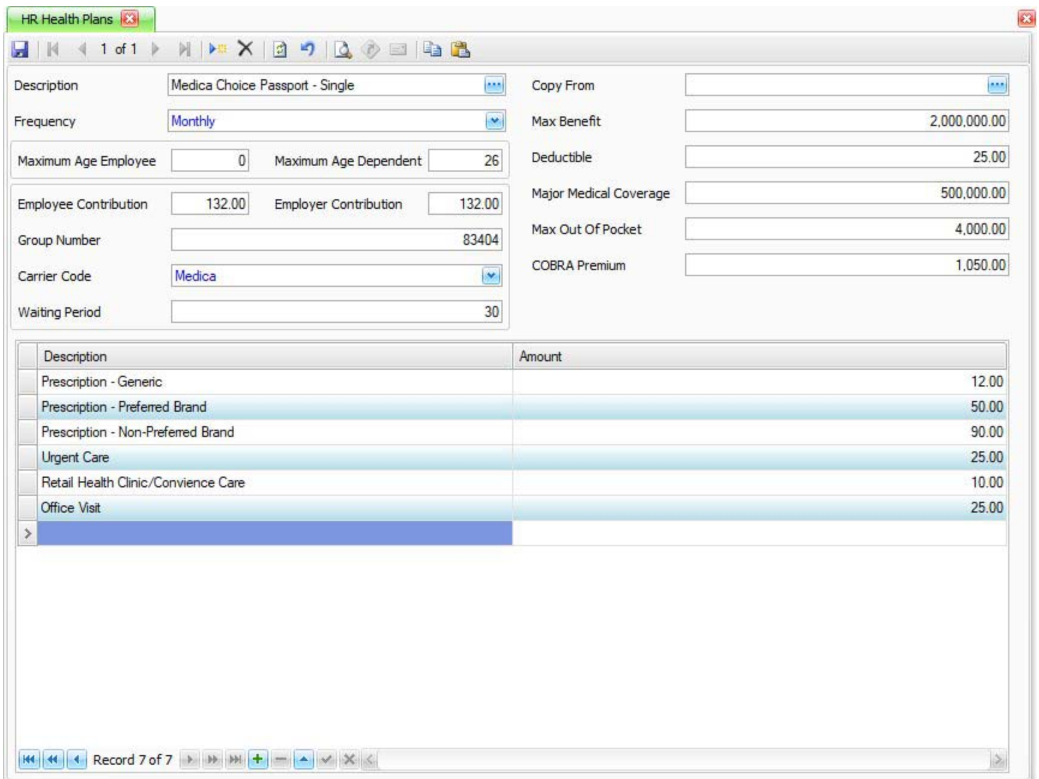
1. Select **Health Plans** from the **Setup and Maintenance** menu.

Health Plans Menu



2. The **Health Plans** screen appears.

Health Plans Screen



3. Click the **New Record** button to add a new Health Plan.
4. Enter a health plan **Description**.
5. When entering a new Health Plan, the **Copy From** field is displayed. Select an existing Health Plan to copy information from, or skip the field to enter all information for the new Health Plan.

   When you copy from an existing Health Plan all fields are copied to the new Health Plan.

Maint

6. Choose the **Frequency** of premium payments from the drop-down list.
7. Enter the maximum age allowable for that plan in the **Maximum Age Employee** field.
8. Enter the maximum dependent age allowable for that plan in the **Maximum Age Dependent** field.

9. Enter the premium amount deducted from the Employee's paycheck (based on Frequency) in the **Employee Contribution** field.
10. Enter the premium amount contributed by the employer for the Frequency chosen in the **Employer Contribution** field.
11. Enter the policy's **Group Number**.
12. Select the company providing the plan from the **Carrier Code** drop-down list.

Maint

13. In the **Waiting Period** (days) field, enter the number of days after the employee's start date until the Employee is eligible for the plan.
14. Enter the **Maximum Benefit** amount provided.
15. Enter the **Deductible** amount.
16. Enter the **Major Medical Coverage** amount.
17. Enter the maximum dollar amount the Employee is responsible for in the **Max Out Of Pocket** field.
18. Enter the **COBRA Premium** amount.

NOTE: Use your plan's provided documentation to find the information listed above.

Enter covered medical services

1. Press the **Add Record** button ( ) at the bottom of the screen to add a covered medical service.
2. Enter the copay code **Description** that may represent the doctor or drug.
3. Enter the copay amount for that service in the **Amount** field.
4. Click the **Save** button on the toolbar to save your changes.

Task Summary

To edit a Health Plan, follow these steps:

1. Select a **Health Plan Description** to edit.
2. Edit the **Description**, **Frequency**, **Ages**, **Employee Contribution**, **Employer Contribution**, **Group Number**, **Carrier Code**, **Waiting Period**, **Max Benefit**, **Deductible**, **Major Medical Coverage**, **Max Out of Pocket**, **Cobra Premium**, and **Covered Medical Services** where appropriate.
3. Click the **Save** button on the toolbar to save your changes.

To remove a Health Plan, follow these steps:

1. Select the **Health Plan Description** to delete.
2. Click the **Delete** button on the toolbar .

To remove a Medical Service item, follow these steps:

1. Select the Health Plan **Description**.
2. Select the **Medical Service** to delete.
3. Click the **Delete** button on the navigation bar at the bottom of the screen.

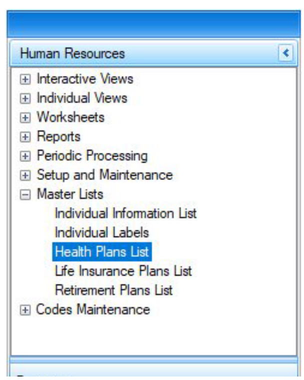
Producing a Health Plans List

Use the **Health Plans List** function to produce a list of Health Plans you have defined in the Health Plans function on the Setup and Maintenance menu.

To produce the **Health Plans List**, follow these steps:

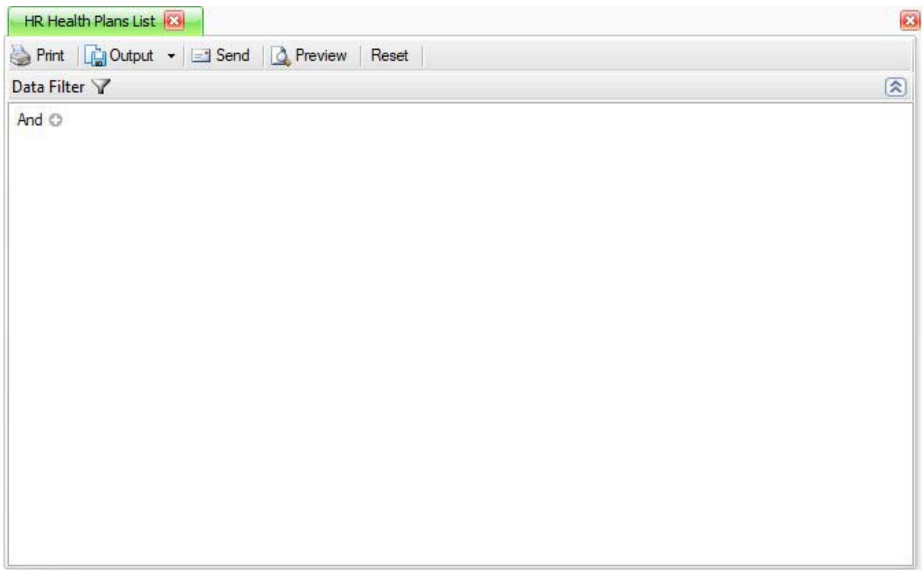
1. Select **Health Plans List** from the **Master Lists** menu.

Health Plans List Menu



2. The **Health Plans List** screen appears.

Health Plans List Screen



3. Select the range of **Filter Criteria** to include in the list or leave the fields blank to include all the Health Plans.
4. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Health Plans List

Continental Products Unlimited
Health Plans List

PAGE 1

Report Filter

Medica Choice Passport - Single

Frequency:	Monthly	**Employee Contribution:**	132.00	**Max Out Of Pocket:**	4,000.00
Carrier:	Medica	**Employer Contribution:**	132.00	**Deductible:**	25.00
Group Number:	83404	**Maximum Age Employee:**	0	**Max Benefit:**	2,000,000.00
		Maximum Age Dependent:	26	**Major Medical Coverage:**	500,000.00
		Waiting Period:	30	**COBRA Premium:**	1,050.00

Description	Amount
Prescription - Generic	12.00
Prescription - Preferred Brand	50.00
Prescription - Non-Preferred Brand	90.00
Urgent Care	25.00
Retail Health Clinic/Convience Care	10.00
Office Visit	25.00

*** End of Report ***

10/17/2017 2:56 PM **Kent.Heitkamp**

LIFE INSURANCE PLANS

There are three Benefit Plan types: Life Insurance, Retirement Plans, and Health Insurance.

After you have set up the **Benefit Type** in Type Code Maintenance, there are two steps that must be followed to set up a new plan before an employee can be enrolled:

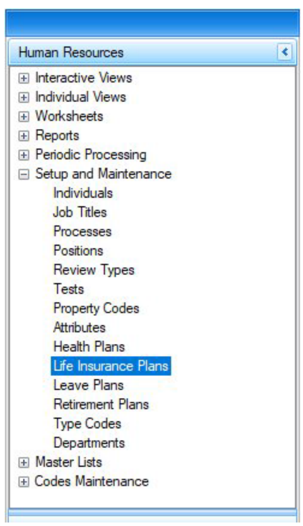
- The company providing the plan (life insurance carrier, health insurance carrier, or retirement plan trustee) must be set up in the Type Codes function.
- The plan details (group number, deduction frequency, waiting period/minimum age, etc.) must be set up.

After this setup has been done, refer to the specific plan under Individuals maintenance to enroll an Individual.

To set up **Life Insurance Plans**, follow these steps:

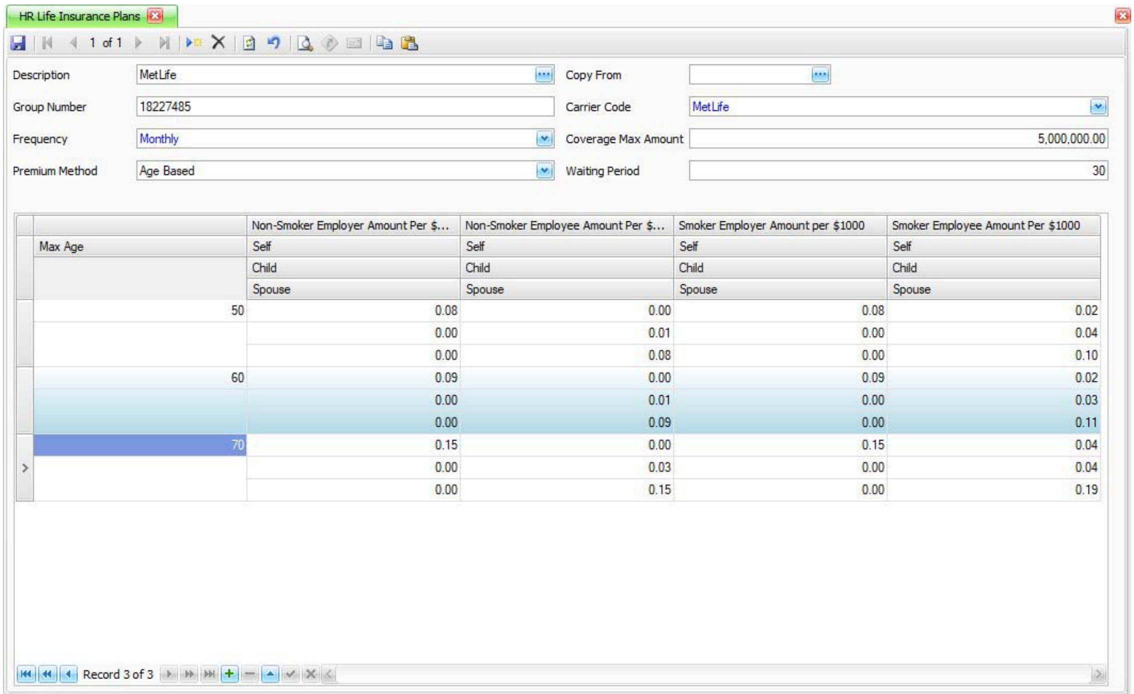
1. Select **Life Insurance Plans** from the **Setup and Maintenance** menu.

Life Insurance Plans Menu



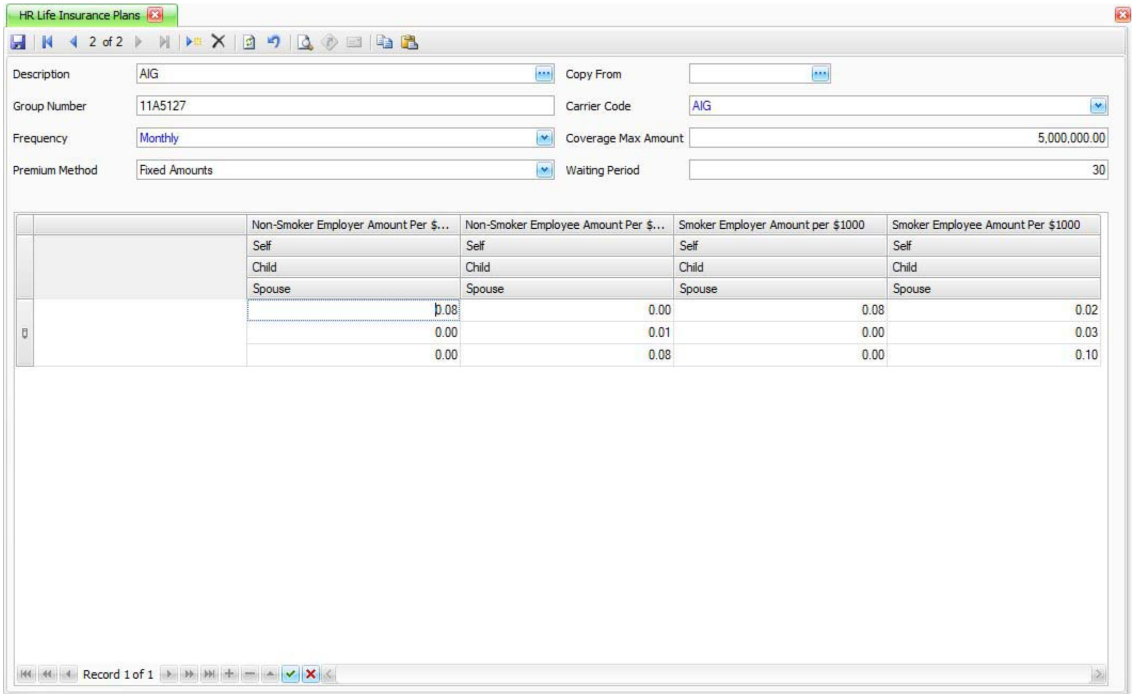
2. The **Life Insurance Plans** screen appears.

Life Insurance Plans Screen - Age-Based Premiums



Max Age	Non-Smoker Employer Amount Per $... Self / Child / Spouse	Non-Smoker Employee Amount Per $... Self / Child / Spouse	Smoker Employer Amount per $1000 Self / Child / Spouse	Smoker Employee Amount Per $1000 Self / Child / Spouse
50	0.08	0.00	0.08	0.02
	0.00	0.01	0.00	0.04
	0.00	0.08	0.00	0.10
60	0.09	0.00	0.09	0.02
	0.00	0.01	0.00	0.03
	0.00	0.09	0.00	0.11
70	0.15	0.00	0.15	0.04
	0.00	0.03	0.00	0.04
	0.00	0.15	0.00	0.19

Life Insurance Plans Screen - Fixed Premiums



3. To create a new Life Insurance Plan, use the **New Record** button on the toolbar.
4. Enter a Life Insurance Plan **Description**.
5. When entering a new Life Insurance Plan, the **Copy From** field is displayed. Select an existing Life Insurance Plan to copy information from, or skip the field to enter all information for the new Life Insurance Plan.

   When you copy from an existing Life Insurance Plan all fields, except the Group Number, are copied to the new Life Insurance Plan.

6. Enter the policy's **Group Number**.

Maint

7. Choose the **Frequency** of premiums from the drop-down list.
8. Choose the **Premium Method**: **Fixed Amount** or **Age Based**.
   - **Fixed Amounts** will have the same premium regardless of the Employee's age.
   - **Age Based** can have difference premium amounts for each age range.

   See the screen pictures above to see the differences between the Premium Method screens.

Maint

9. Select the company providing the plan from the **Carrier Code** drop-down list.
10. Enter the maximum coverage provided in the **Coverage Max Amt** field.
11. In the **Waiting Period** (days) field, enter the number of days after the Employee's start date until the Employee is eligible for coverage.

Enter premiums

For the **Fixed Amount** premium method, you will enter only one group of premiums for Self, Spouse, and Child.

For the **Age Based** premium method, you will enter premiums for Self, Spouse, and Child for each Max Age group.

1. Press the **Add Record** button ( ) at the bottom of the screen to add a premium amount.
2. Only for **Age Based Premium Method**: Enter the maximum age for which this group of premiums pertains in the **Max Age** field.

The remaining fields are active for both the Fixed Amount and Age Based Premium Method selections.

3. In the **Non Smoker Employer Amt Per $1000** column, enter the premium amount per thousand dollars of coverage for Non-Smokers for **Self**, **Spouse**, and each **Child**.
4. In the **Non Smoker Employee Amt Per $1000** column, enter the premium amount per thousand dollars of coverage for Non-Smokers for **Self**, **Spouse**, and each **Child**.
5. In the **Smoker Employer Amt Per $1000** column, enter the premium amount per thousand dollars of coverage for Smokers for **Self**, **Spouse**, and each **Child**.
6. In the **Smoker Employee Amt Per $1000** column, enter the premium amount per thousand dollars of coverage for Smokers for **Self**, **Spouse**, and each **Child**.
7. Click the **Save** button on the toolbar to save your changes.

Task Summary

To edit a Life Insurance Plan, follow these steps:

1. Select a **Life Insurance Plan Description** to edit.
2. Edit the **Description**, **Group Number**, **Frequency**, **Premium Method**, **Carrier Code**, **Coverage Max Amount, Waiting Period**, and **Premium Amounts** where appropriate.
3. Click the **Save** button on the toolbar to save your changes.

To remove a Life Insurance Plan, follow these steps:

1. Select the **Life Insurance Plan Description** to delete.
2. Click the **Delete** button on the toolbar .

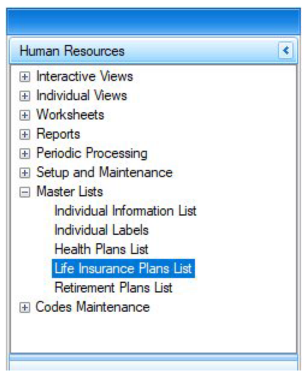
Producing a Life Insurance Plans List

Use the **Life Insurance Plans List** function to produce a list of Life Insurance Plans you have defined in the Life Insurance Plans function on the Setup and Maintenance menu.

To produce the **Life Insurance Plans List**, follow these steps:

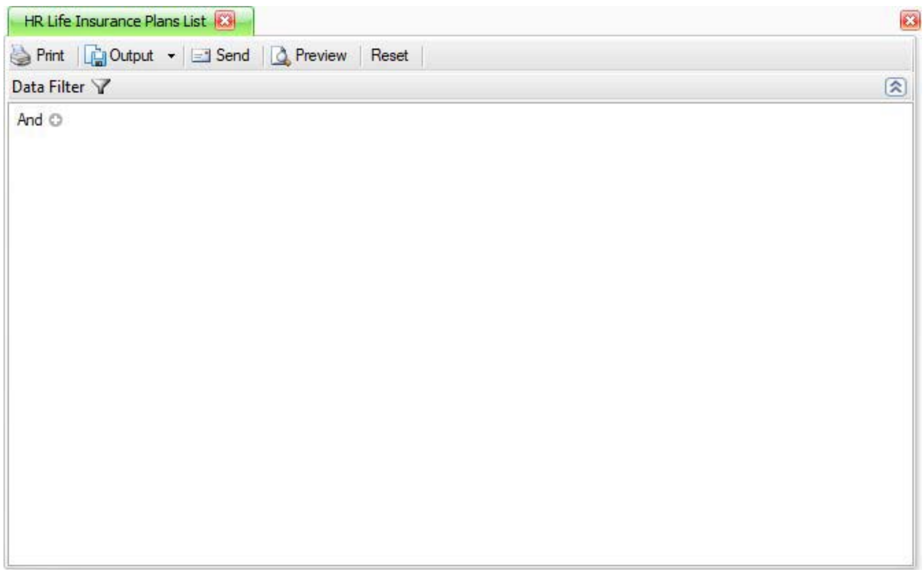
1. Select **Life Insurance Plans List** from the **Master Lists** menu.

Life Insurance Plans List Menu



2. The **Life Insurance Plans List** screen appears.

Life Insurance Plans List Screen



3. Select the range of **Filter Criteria** to include in the list or leave the fields blank to include all the Life Insurance Plans.
4. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Life Insurance Plans List

Continental Products Unlimited
Life Insurance Plans List
PAGE 1

Report Filter

MetLife MetLife

Frequency: Monthly
Carrier: MetLife
Group Number: 18227485
Premium Method: Age Based
Waiting Period (days): 30
Maximum Amount Coverage: 5,000,000.00

Max Age		Non Smoker Employer Amt Per $1000	Non Smoker Employee Amt Per $1000	Smoker Employer Amt Per $1000	Smoker Employee Amt Per $1000
50	Self	0.08	0.00	0.08	0.02
	Spouse	0.00	0.08	0.00	0.10
	Child	0.00	0.01	0.00	0.04
60	Self	0.09	0.00	0.09	0.02
	Spouse	0.00	0.09	0.00	0.11
	Child	0.00	0.01	0.00	0.03
70	Self	0.15	0.00	0.15	0.04
	Spouse	0.00	0.15	0.00	0.19
	Child	0.00	0.03	0.00	0.04

AIG AIG

Frequency: Monthly
Carrier: AIG
Group Number: 11A5127
Premium Method: Fixed Amounts
Waiting Period (days): 30
Maximum Amount Coverage: 5,000,000.00

Max Age		Non Smoker Employer Amt Per $1000	Non Smoker Employee Amt Per $1000	Smoker Employer Amt Per $1000	Smoker Employee Amt Per $1000
	Self	0.08	0.00	0.08	0.02
	Spouse	0.00	0.08	0.00	0.10
	Child	0.00	0.01	0.00	0.03

*** End of Report ***

10/17/2017 2:58 PM Kent.Heitkamp

LEAVE PLANS

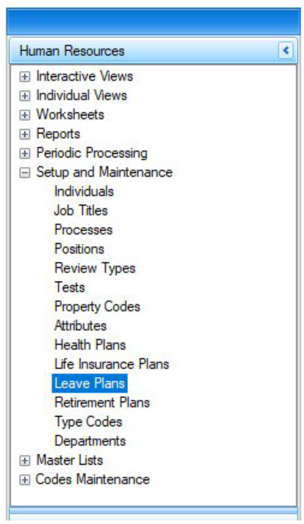
Leave Plans are used in the Positions maintenance screen. Leave Plan balances are only accumulated in Payroll. TRAVERSE HR does not delete, move or update balances. Only the Leave Code is transferred to Payroll.

You must have Leave Codes set up prior to setting up Leave Plans.

To set up **Leave Plans**, follow these steps:

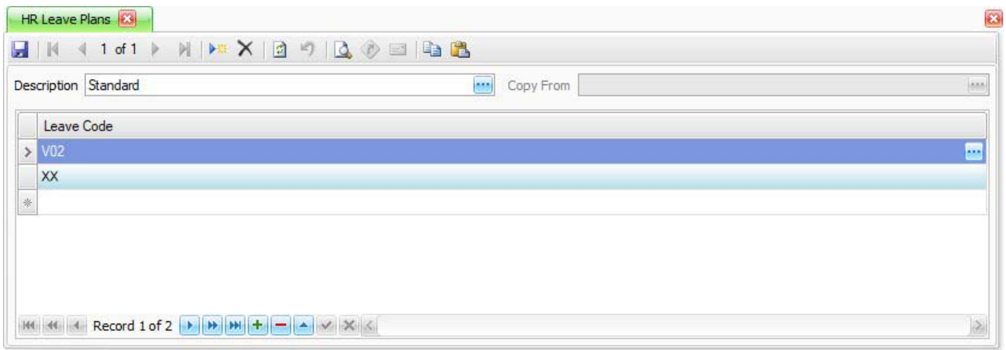
1. Select **Leave Plans** from the **Setup and Maintenance** menu.

Leave Plans Menu



2. The **Leave Plans** screen appears.

Leave Plans Screen



3. To create a new Leave Plan, use the **New Record** button on the toolbar and enter a Leave Plan **Description**.
4. When entering a new Leave Plan, the **Copy From** field is displayed. Select an existing Leave Plan to copy information from, or skip the field to enter all information for the new Leave Plan.

   When you copy from an existing Leave Plan all fields are copied to the new Leave Plan.
5. Press the **Add Record** button ( ) to add a new **Leave Code**.
6. Enter or select a new **Leave Code**.
7. Click the **Save** button on the toolbar to save your changes.

Task Summary

To edit a Leave Plan, follow these steps:

1. Select the **Leave Plan Description** from the drop-down list to edit.
2. Select a **Leave Code** to edit where appropriate.
3. Click the **Save** button on the toolbar to save your changes.

To remove a Leave Plan, follow these steps:

1. Select the **Leave Plan Description** to delete.
2. Click the **Delete** button on the toolbar .

To remove a Leave Code item, follow these steps:

1. Select the Leave Plan **Description**.
2. Select the **Leave Code** to delete.
3. Click the **Delete** button on the navigation bar at the bottom of the screen.

RETIREMENT PLANS

There are three Benefit Plan types: Life Insurance, Retirement Plans, and Health Insurance.

After you have set up the **Benefit Type** in Type Code Maintenance, there are two steps that must be followed to set up a new plan before an employee can be enrolled:

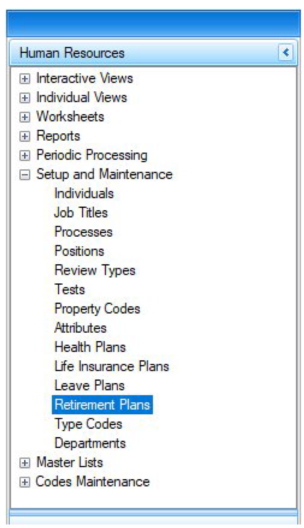
- The company providing the plan (life insurance carrier, health insurance carrier, or retirement plan trustee) must be set up in the Type Codes function.
- The plan details (group number, deduction frequency, waiting period/minimum age, etc.) must be set up.

After this setup has been done, refer to the specific plan under Individuals maintenance to enroll an Individual.

To set up **Retirement Plans**, follow these steps:

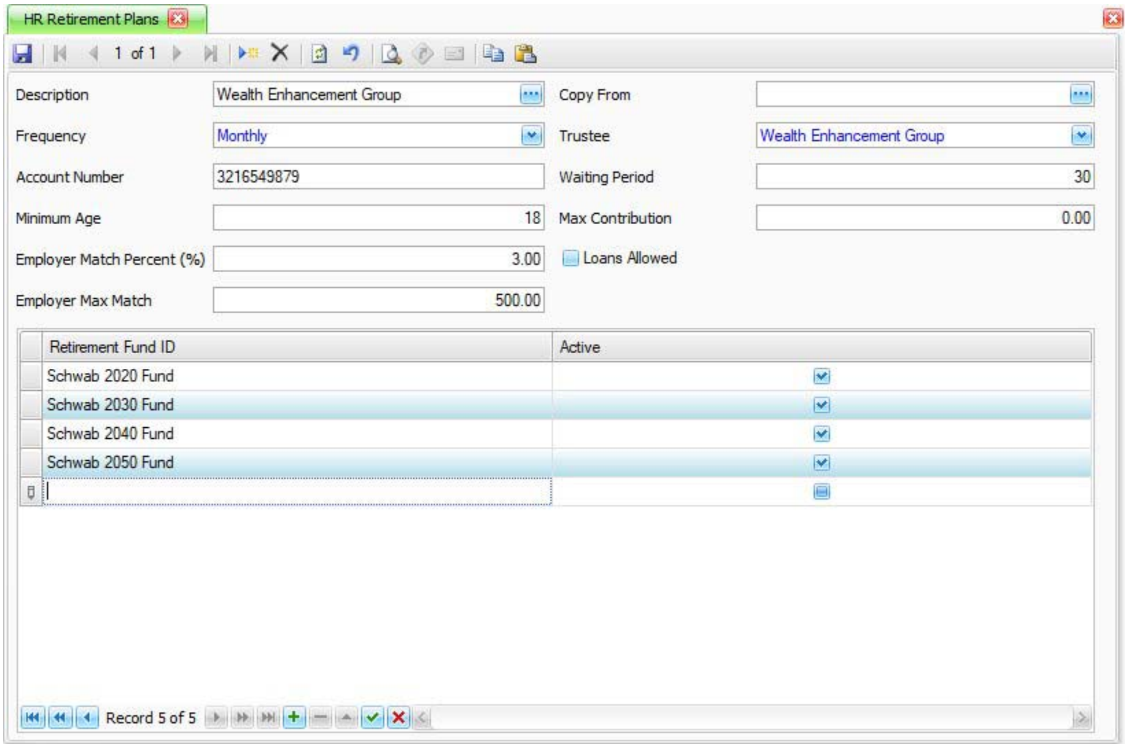
1. Select **Retirement Plans** from the **Setup and Maintenance** menu.

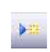
Retirement Plans Menu



2. The **Retirement Plans** screen appears.

Retirement Plans Screen



3. To create a new Retirement Plan, use the **New Record** button  on the toolbar.
4. Enter the **Description** of the Retirement Plan.
5. When entering a new Retirement Plan, the **Copy From** field is displayed. Select an existing Retirement Plan to copy information from, or skip the field to enter all information for the new Retirement Plan.

   When you copy from an existing Retirement Plan all fields are copied to the new Retirement Plan.

Maint

6. Choose the **Frequency** of deductions from the drop-down list.
7. Enter the Retirement Plan's **Account Number**.
8. Enter the **Minimum Age** allowed for this Retirement Plan.

9. Enter the percentage of the contribution matched by the employer in the **Employer Match Percent (%)** field. This amount is entered as a whole number, for example; a 3% employer match would be entered as 3.0.

10. Enter the maximum dollar amount matched by the employer in the **Employer Max Match** field.

Maint

11. Select the company providing the plan from the **Trustee** drop-down list.

12. In the **Waiting Period** (days) field, enter the number of days after the Employee's start date until the Employee is eligible for the plan.

13. Enter the maximum annual dollar amount the employee can contribute to the plan in the **Max Contribution** field.

14. Mark the **Loans Allowed** check box if the plan allows for Employee loans.

Enter funds

1. Press the **Add Record** button ( ) at the bottom of the screen to add data.
2. Enter a **Description** for the fund.
3. Mark the **Active** check box if the fund is active.
4. Click the **Save** button on the toolbar to save your changes.

Task Summary

To edit a Retirement Plan, follow these steps:

1. Select the **Retirement Plan Description** from the drop-down list to edit.
2. Edit the **Frequency**, **Account Number**, **Minimum Age**, **Employer Match Percent**, **Employer Max Match**, **Trustee**, **Waiting Period**, **Max Contribution**, and **Retirement Fund ID** where appropriate.
3. Click the **Save** button on the toolbar to save your changes.

To remove a Retirement Plan, follow these steps:

1. Select the **Retirement Plan Description** to delete.
2. Click the **Delete** button on the toolbar .

To remove a Retirement Fund ID item, follow these steps:

1. Select the Retirement Plan **Description**.
2. Select the **Retirement Fund ID** to delete.
3. Click the **Delete** button on the navigation bar at the bottom of the screen.

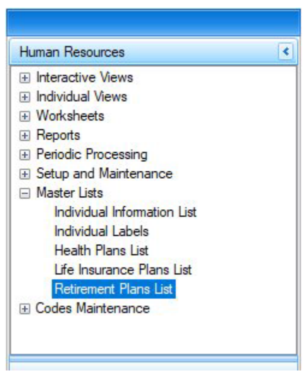
Producing a Retirement Plans List

Use the **Retirement Plans List** function to produce a list of Retirement Plans you have defined in the Retirement Plans function on the Setup and Maintenance menu.

To produce the **Retirement Plans List**, follow these steps:

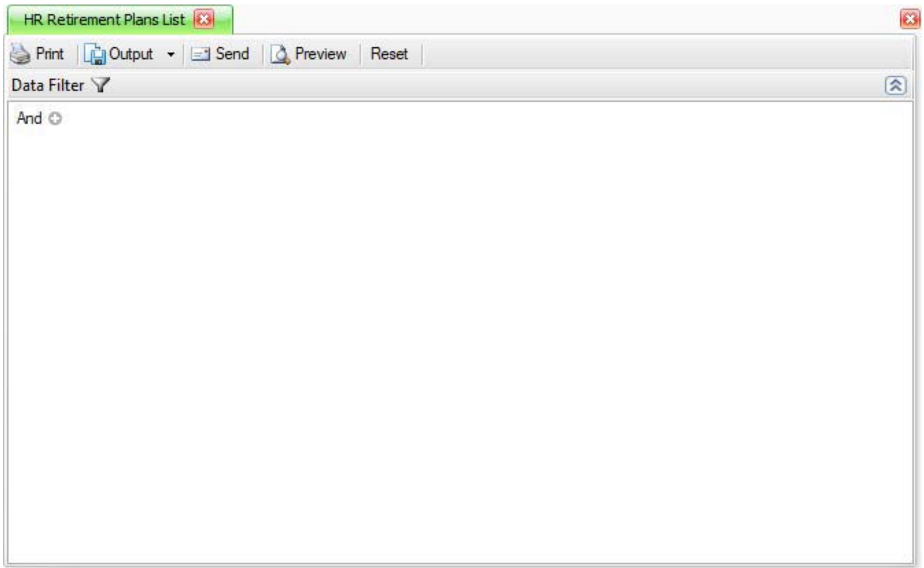
1. Select **Retirement Plans List** from the **Master Lists** menu.

Retirement Plans List Menu



2. The **Retirement Plans List** screen appears.

Retirement Plans List Screen



3. Select the range of **Filter Criteria** to include in the list or leave the fields blank to include all the Retirement Plans.
4. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Retirement Plans List

Continental Products Unlimited
Retirement Plans List

PAGE 1

Report Filter

Wealth Enhancement Group

Frequency: Monthly
Trustee: Wealth Enhancement Group
Account Number: 3216549879

Minimum Age: 18
Waiting Period (Days): 30
Employer Match %: 3.00
Employee Max Match: 500.00

Maximum Contribution: 0.00
Loans Allowed: ☐

Fund Description	Active
Schwab 2020 Fund	☑
Schwab 2030 Fund	☑
Schwab 2040 Fund	☑
Schwab 2050 Fund	☑

*** End of Report ***

10/17/2017 3:00 PM **Kent.Heitkamp**

DEPARTMENTS

Use the **Departments** function to set up and maintain information for Departments and divisions of your company. Information in the Department record is updated for Earnings, Employer Costs, and Employer Taxes when the Payroll Post Transactions function on the Daily Work menu or the Payroll Post Checks function on the Payday Work menu are run. If Payroll is interfaced with General Ledger, this information updates Accounts in the General Ledger when you use the Post Checks function on the Payday Work menu.

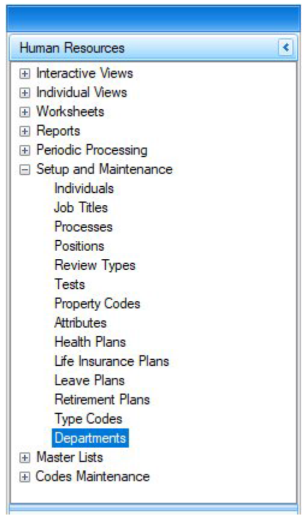
NOTE: Employer Taxes and Costs are updated based on the selection made in the Employer Taxes/Costs to Home or Worked Department field in the Miscellaneous section in Payroll Business Rules. If Home was selected, the Post Transactions function updates the Employer Costs and Withholdings for the department specified on the Position tab in the Individuals function. If Worked was selected, Employer Withholdings and Costs are posted to the Department specified during time ticket entry in the Payroll Transactions function on the Daily Work menu. For a Salaried Employee with time ticket transactions, if the total hours entered on the time tickets are less than the total hours per pay period according to the Individual's default Earning Code, then the difference is posted to the Home department.

NOTE: When the selection is made on the Accounting Basis as Accrual in the Miscellaneous section of the Payroll Business Rules you must click on the Sync Details button, for each Department, to bring in the Accrued Wages record and the default Accrual Account from the Payroll Business Rules. Once the Accrued Wages record has been brought into each Department, assign the appropriate Account for the displayed Department.

To set up **Departments**, follow these steps:

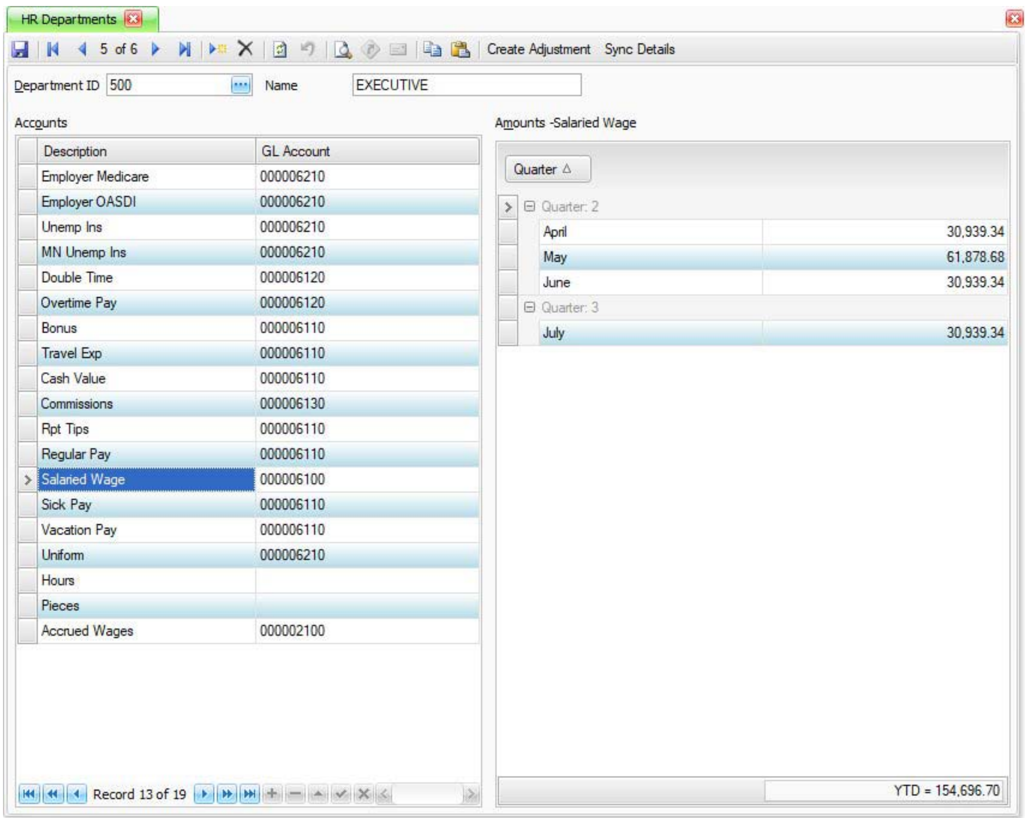
1. Select **Departments** from the **Setup and Maintenance** menu.

Departments Menu



2. The **Departments** screen appears.

Departments Screen



3. Enter a new **Department ID** or select the Department ID with which to work.
4. Enter the **Name** of the Department.
5. Select the Department to **Copy From**. This field is available only when adding a new Department.
6. All Earning Codes, Employer Taxes, and Payroll Employer Costs set up in the corresponding functions on the Codes Maintenance menu are displayed.
7. For each Earning Code, Employer Tax and, Employer Cost, select the **GL Account** to be debited when you run the Payroll Post Checks function. This Account should be an expense account. Select the Accrued Wages account, if you selected Accrual in the Payroll Business Rules for your Accounting Basis.

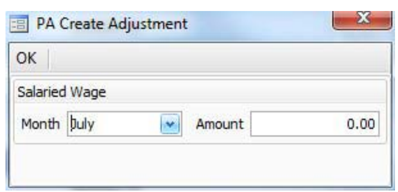
The Accrued Wages account will be Credited for the amount of the expenses when Payroll Daily Work Transactions are posted.

8. Each **Quarter** and **Month** of the year is displayed.
9. The total **Amount** of expenses posted for the expense selected is displayed for each month.
10. The **YTD** expense total for the Department is displayed and updated when you run the Payroll Post Transactions and Payroll Post Checks functions. This field should *not* be edited after you have made set up entries.

Command Buttons

Name	Description
Create Adjustment	Enter adjustment amounts for the selected expense and month.
Sync Details	Synchronize any new expenses and accrued wages records that have been added.

Create Adjustment Screen



The **Create Adjustment** screen appears when you select the **Create Adjustment** button in the toolbar.

1. Select the **Department ID** with which to work.
2. Select the Department Expense from the **Accounts** area, to which you will be making an adjustment.
3. Select the **Create Adjustment** button.
4. Select the **Month** to make the Adjustment.
5. Enter the **Amount** of the Adjustment. Enter a positive number to add to the total for the month and a negative number to subtract from the total for the month.
6. Click **OK** to apply the Adjustment and return to the Departments screen.

NOTE: You must click on the Sync Details button for each Department after adding an Employer Tax, Employer Cost or a new Earning Code, for the codes to be displayed and allow you to enter an Expense Account.

Task Summary

To add a Department, follow these steps:

1. Select the **New Record** icon on the toolbar. A blank Departments screen appears.
2. Enter a **Department ID** and **Name** for the new Department.
3. Select the Department to Copy From, if applicable.
4. Select the appropriate GL Accounts, and enter the monthly expense amounts.
5. Click the **Save** button , on the toolbar, to save the new Department.

To edit a Department, follow these steps:

1. Select the **Department ID** of the Department to edit.
2. Edit the appropriate information.
3. Click the **Save** button , on the toolbar, to save the edited Department.

To delete a Department, follow these steps:

1. Select the **Department ID** of the Department to delete.
2. Click the **Delete** button , on the toolbar, to delete the selected Department.

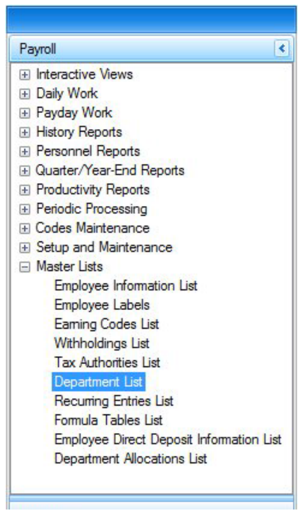
Producing a Department List

Use the **Department List** function to produce a list of Departments you have defined in the Departments function on the Setup and Maintenance menu.

To produce the **Department List**, follow these steps:

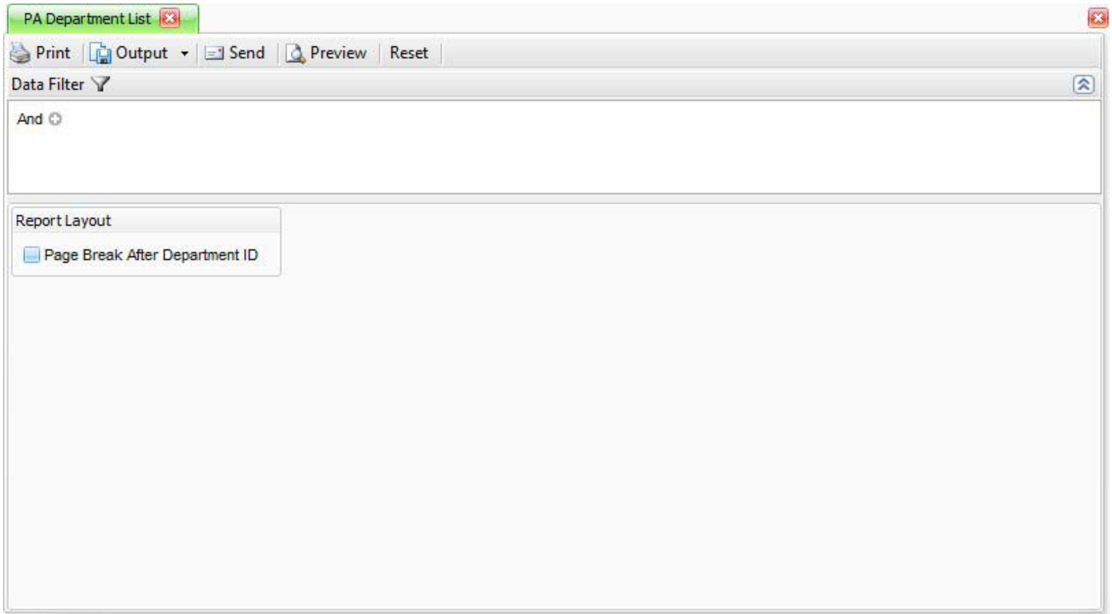
1. Select **Department List** from the **Payroll Master Lists** menu.

Department List Menu



2. The **Department List** screen appears.

Department List Screen



3. Select the range of **Filter Criteria** to include in the list or leave the fields blank to include all the IDs.
4. To place a **Page Break After Department ID**, select the box; otherwise, clear the box.
5. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Department List

Continental Products Unlimited
Department List

Page 5

Department ID / Description / GL Account	Name	January	February	March	April	May	June	July	August	September	October	November	December	YTD
00-000-6110														
Uniform		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00-000-6210														
Hours		0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
Pieces		0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
500	EXECUTIVE													
Employer Medicare		0.00	0.00	0.00	0.00	0.00	448.62	448.62	2,183.65	0.00	0.00	0.00	0.00	3,080.89
00-000-6210														
Employer OASDI		0.00	0.00	0.00	0.00	0.00	1,918.23	1,918.24	9,336.98	0.00	0.00	0.00	0.00	13,173.45
00-000-6210														
Unemp Ins		0.00	0.00	0.00	0.00	0.00	0.00	0.00	97.69	0.00	0.00	0.00	0.00	97.69
00-000-6210														
MN Unemp Ins		0.00	0.00	0.00	0.00	0.00	287.68	265.93	651.74	0.00	0.00	0.00	0.00	1,205.35
00-000-6210														
WI State Unemployment Insuran		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00-000-6210														
Double Time		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00-000-6120														
Overtime Pay		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00-000-6120														
Bonus		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00-000-6110														
Travel Exp		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00-000-6110														
Cash Value		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00-000-6110														
Commissions		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00-000-6130														
Rpt Tips		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00-000-6110														
Regular Pay		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00-000-6110														
Salaried Wage		0.00	0.00	0.00	0.00	0.00	30,939.34	30,939.34	150,596.70	0.00	0.00	0.00	0.00	212,475.38
00-000-6100														
Sick Pay		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
00-000-6110														

8/20/2010 2:26 PM **OPEN_SYSTEMS\kenthe**

INDIVIDUALS

The **Individuals** screen is the primary screen for entering and maintaining data on Individuals. Data entered here is then transferred to update Payroll.

If you have Payroll with Employees set up prior to implementing Human Resources, use the Initialize Individuals function on the Periodic Processing menu, to bring your Employees into the Human Resources Individuals function.

- Set up access permissions for the tabs on the Individuals maintenance screen.

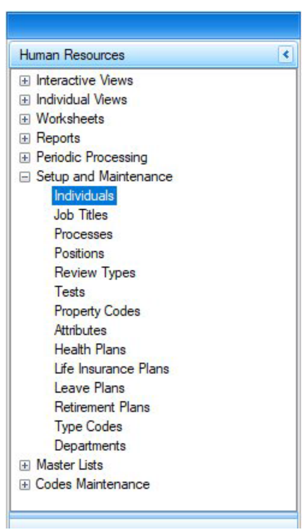
NOTE: In order for a user to add or delete an Individual, the user must have access to all the tabs.

- To delete an employee in HR, the employee must first be deleted from Payroll.
- The Individuals screen has many tabs, of which some may not be visible on your screen. Use the arrow buttons in the tab area to view more tabs.

To set up **Individuals**, follow these steps:

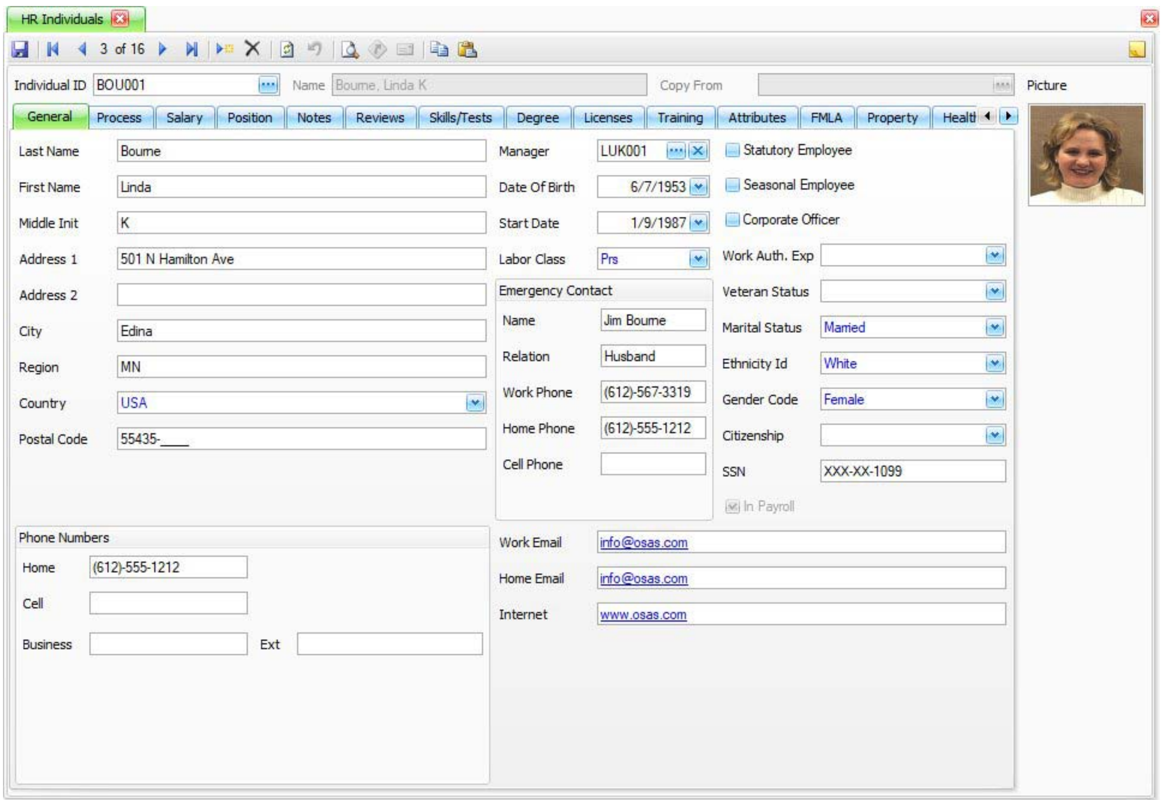
1. Select **Individuals** from the **Setup and Maintenance** menu.

Individuals Menu



2. The **Individuals** screen appears with the General tab displayed.

Individuals Screen - General Tab



The **General** tab of the Individual Maintenance function captures information such as Name, Address and Phone Number, Emergency Contact information, Ethnicity, Gender, Veteran Status, etc.

3. To create a new individual, click the **New Record** icon  on the toolbar and enter an Individual ID. If you want to edit an individual, select the Individual ID from the drop-down list.

NOTE: If you have used the Initialize Individuals function, you will see your list of Employees in the drop-down list.

4. When entering a new Individual, the **Copy From** field is displayed. Select an existing Individual to copy information from, or skip the field to enter all information for the new Individual.

    When you copy from an existing Individual the **Region**, **Country**, **Manager**, **Labor Class**, and **Federal**, **State**, and **Local Taxes** information are copied to the new Individual.

5. Enter or edit the **Last Name** (up to 20 characters), **First Name** (up to 15 characters), and **Middle Initial** (1 character) for the Individual ID.
6. Enter or edit the first line of the Individual's home address in the **Address 1** field. Enter the second line of the home address, if necessary, in the **Address 2** field.

Maint

7. Enter or edit the Individual's home **City**, **Region (State)**, **Country**, and **Postal Code**.
8. Enter or edit the Individual's **Phone Numbers**, including a **Home** number, **Cell** number, and **Business** number with **Extension**, if applicable.
9. The **Manager** field will fill in automatically when the Individual is assigned a Position (if the Position has been assigned a Supervisor Position Number in the Positions maintenance screen and the Apply Positions Update (page 3-94) function is used). If no Manager has been assigned, select a Manager from the drop-down list, or use the "X" to remove the Manager.
10. Enter or edit the Individual's **Date of Birth**.

    When the Individual is under 18 years old, an indicator will appear to indicate the Individual is a minor .

11. Enter or edit the Individual's **Start Date**.

Maint

12. Select or edit the **Labor Class**.
13. In the **Emergency Contact** section, enter the contact's **Name**, **Relation** to the Individual, **Work Phone**, **Home Phone**, and **Cell Phone** information.
14. Enter or edit the Individual's **Work Email**, **Home Email**, and **Internet** address, as applicable.
15. Mark the appropriate check box(es) if the Individual is a **Statutory Employee**, **Seasonal Employee**, or a **Corporate Officer**.
16. If applicable, enter a work authorization expiration date in the **Work Auth Exp** field.

Maint

17. Select or edit the Individual's **Veteran Status** from the drop-down list.

Maint

18. Select or edit the Individual's **Marital Status** from the drop-down list.

Maint

19. Select or edit the Individual's **Ethnicity ID**.

Maint

20. Select or edit the Individual's **Gender Code**.

Maint

21. Select or edit the individual's **Citizenship**.

22. Enter or edit the Individual's Social Security Number in the **SSN** field. The system will check to make sure the SSN does not match one already in the system to avoid duplication of records. If a duplicate Social Security Number is entered, a warning message will appear to notify you the Social Security Number is duplicated.

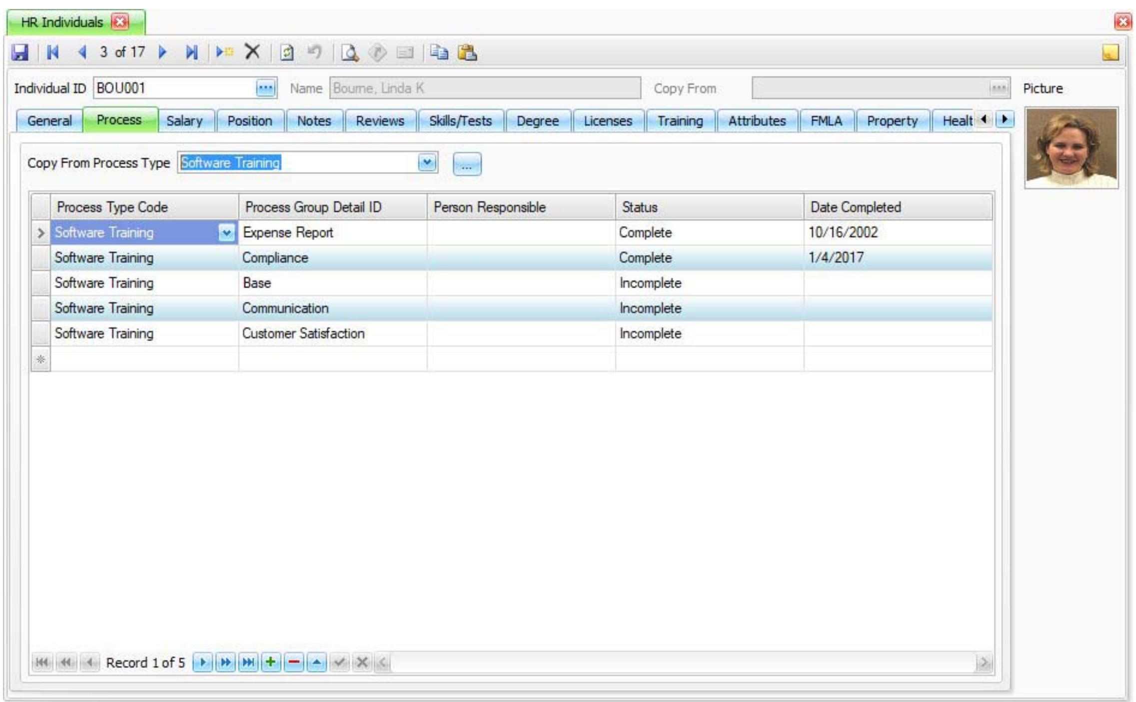
23. Right-click on the **Picture** field and select **Load** to upload a digital picture of the individual. For the upload, you will need to browse to the folder and file. You can also copy and paste the picture into the field.

24. The **In Payroll** check box is automatically marked if the Individual is already in Payroll.

25. Click the **Save** button on the toolbar to save your changes.

NOTE: If the Initialize Individuals has been run most of the fields will be updated with information from the Employee Information setup in System Manager/Payroll. The fields not updated will be Cell phone number, Emergency Contact Cell phone number, Work Auth. Exp, Veteran Status, and Citizenship.

Individuals Screen - Process Tab



Use the **Process** tab to organize and track tasks for various processes including new hire orientation, exit interview or property assignment. You can define an unlimited number of processes.

Multiple processes may be used on a single individual.

Maint

1. Select a **Copy From Process Type** from the drop-down list. The processes in use will be indicated in the drop-down list.

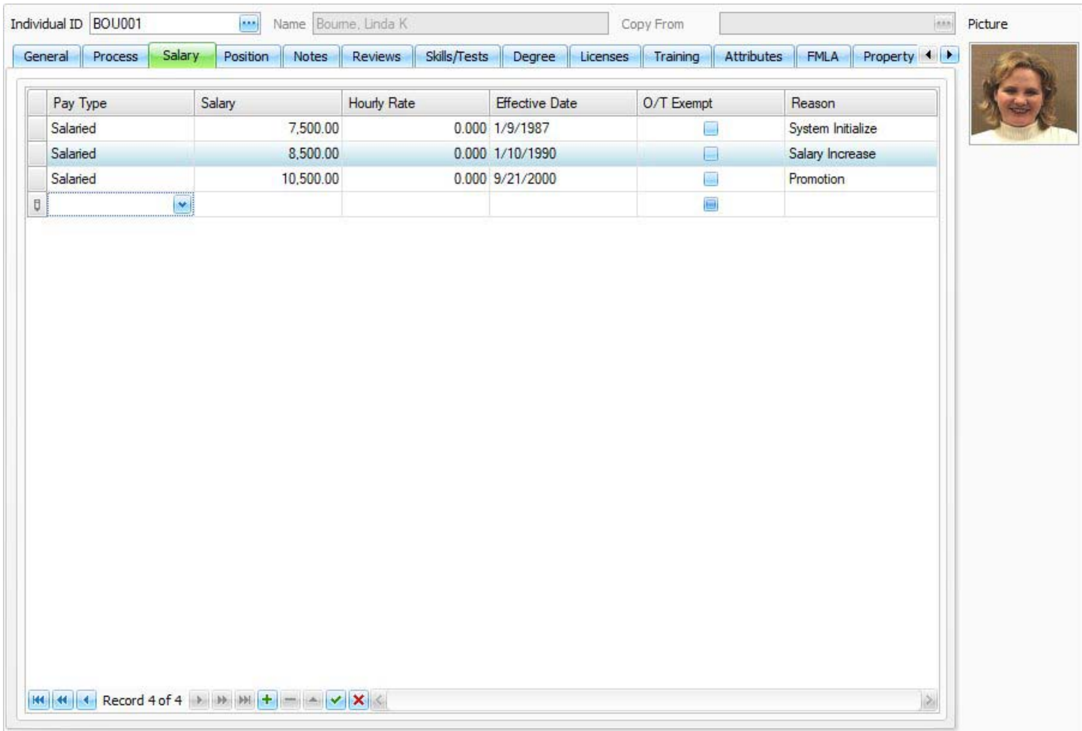
    Select the **Copy** button to copy the Process records set up for the Process Type into the Individual.

2. To manually add a **Process Group Detail ID** item, use the **Add Record** button ( ) at the bottom of the screen and select an item from the Process Group Detail ID drop-down list.

    The items available in the list will be the Process Group Detail ID items you set up in Process Type selected from the Processes setup.

3. To delete an item, highlight it and then use the **Delete** button at the bottom of the screen.
4. Accept or select a **Person Responsible** for the process checklist item.
5. If the checklist item is complete, select a **Status** of “**Complete**”; otherwise, select “**Incomplete**”.
6. When the checklist item is Complete, enter or edit the **Date Completed**.
7. Click the **Save** button on the toolbar to save your changes.

Individuals Screen - Salary Tab



The **Salary** tab tracks pay rate changes and effective dates.

NOTE: Salary changes should generally coincide with the start/finish of a payroll period.

NOTE: Any change that is done mid-payroll period will require manual adjustments in Payroll.

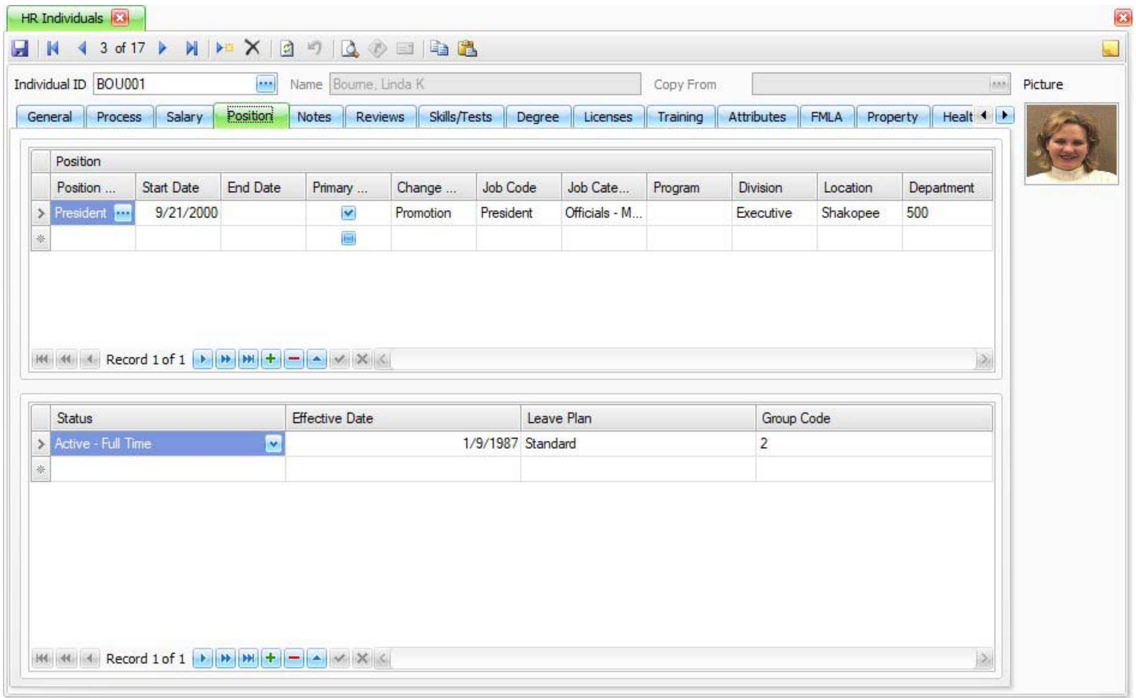
For each **Salary** change for the individual:

1. Select the **Pay Type** from the drop-down list: **Salaried** or **Hourly**.

   - If the pay type is **Salaried**, enter the amount the person makes in a single pay period in the **Salary** column. The amount listed here will override the salary in the Position tab.
   - If the pay type is **Hourly**, enter the amount the individual makes per hour in the **Hourly Rate** column.

2. Enter the **Effective Date** of the salary/hourly rate or Pay Type change.
3. Mark the **O/T Exempt** check box if the Individual is exempt from overtime pay.
4. Enter the **Reason** for the salary/hourly rate or Individual Type Change.
5. Click the **Save** button on the toolbar to save your changes.

Individuals Screen - Position Tab



The **Position** and **Status** screen tracks changes in the individual's Position Number, Job Category, Job Code, and Department, Promotions, and changes in Status (full time, part time, terminated, etc.). All of these changes are date stamped.

Maint

1. Select a **Position Number** from the drop-down list. The **Job Code**, **Job Category**, **Program**, **Division**, **Location**, and **Department** fill in automatically from information entered into the Position setup and maintenance screen.
2. Enter the **Start Date** as appropriate.
3. Enter the **End Date**, as appropriate, this field may be left blank.
4. Mark the **Primary Position** check box, as appropriate.

Maint

5. Select the **Change Reason** from the drop-down list.

In the detail area:

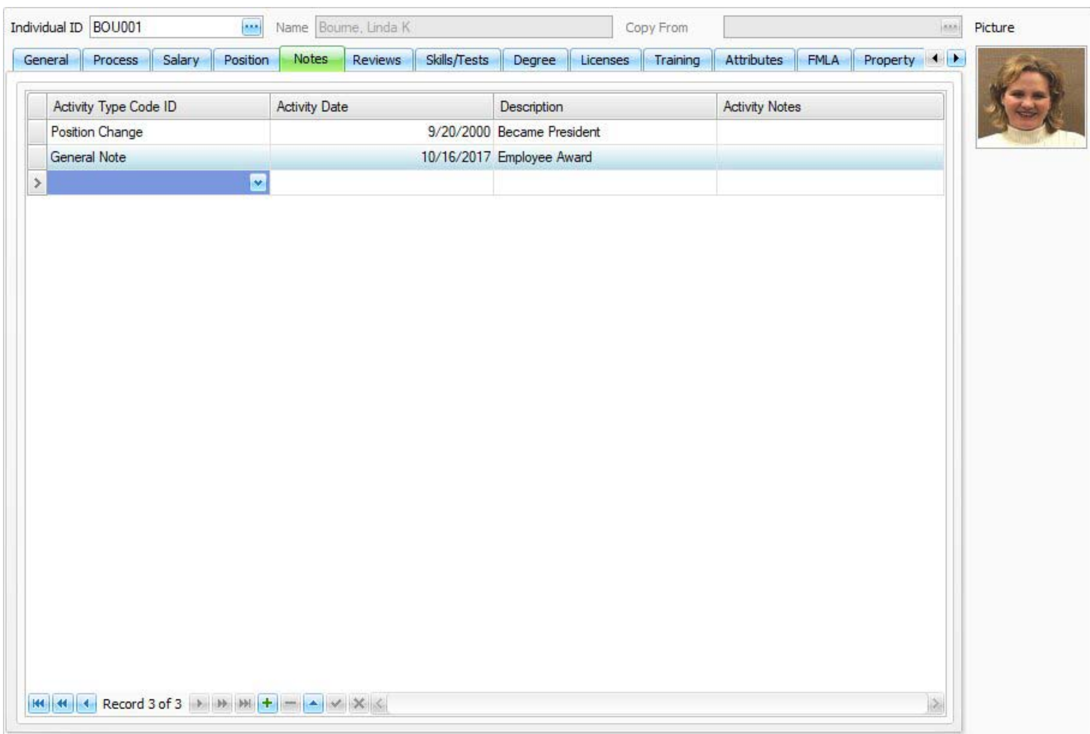
Maint

1. Select the individual's **Status** from the drop-down list.
2. Enter the Status **Effective Date**.

Maint

3. Select a **Leave Plan** for the Individual from the drop-down list.
4. Enter a **Group Code** Override, as applicable. This can be used to exclude people from payroll runs.
5. Click the **Save** button on the toolbar to save your changes.

Individuals Screen - Notes Tab

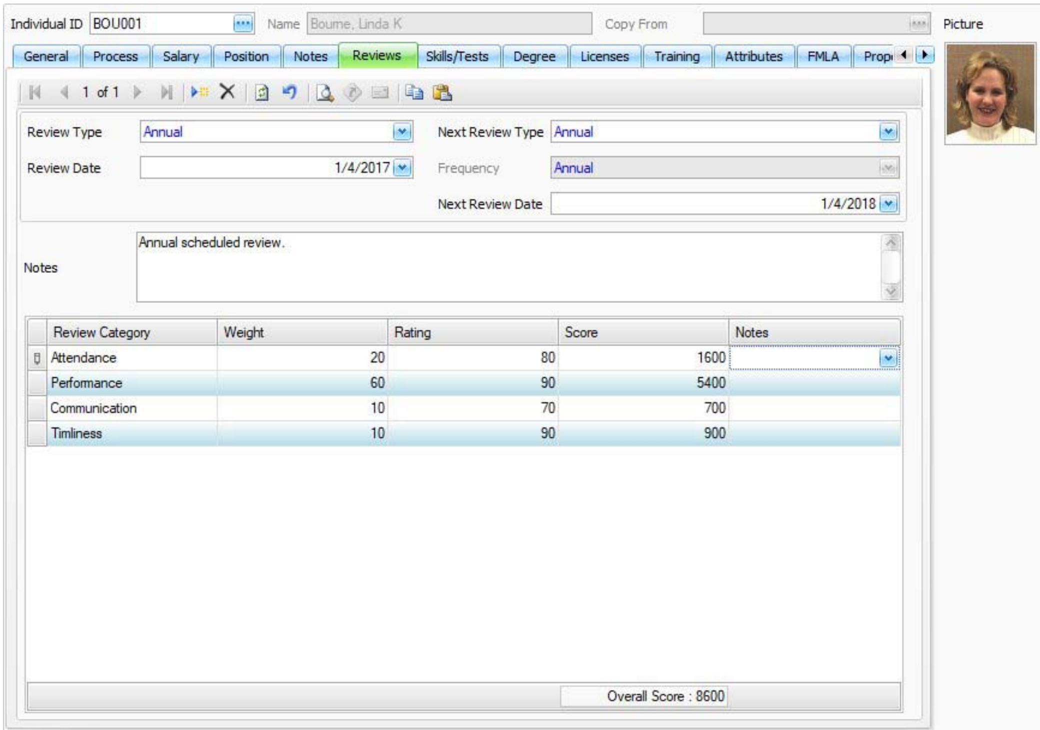


The **Notes** tab keeps track of any notes that you might want to enter about an Individual.

Maint

1. Select an **Activity Type Code ID** from the drop-down list.
2. Enter an **Activity Date** the note was entered.
3. Enter a **Description** for the activity.
4. Enter any notes related to that activity in the **Activity Note** field.

Individuals Screen - Reviews Tab



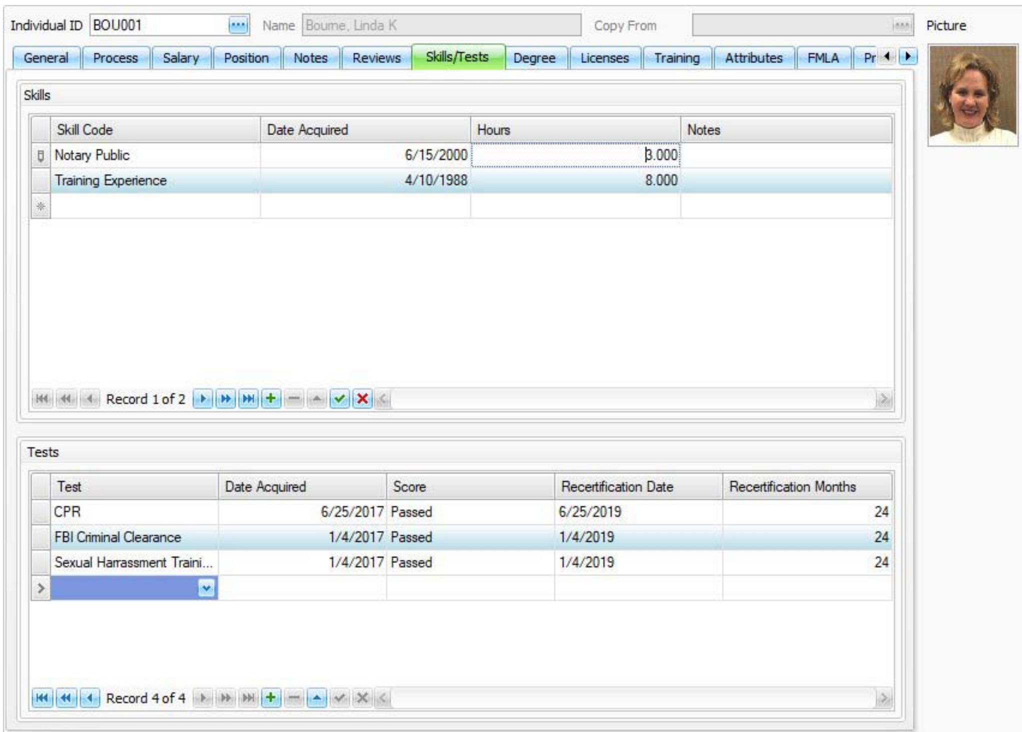
1. Use the **New Record** icon  on the tab's toolbar to record a new Review, or you can modify a review already entered. An individual can have multiple reviews.
2. Select a **Review Type** from the drop-down list.
3. Enter the **Review Date**.
4. Maint Select the **Next Review Type** from the drop-down list.
5. Maint The **Frequency** field defaults to the frequency of the selected review type. This field is for information only.
6. The **Next Review Date** is calculated from the review date and frequency. You can change this value if necessary.
7. Enter any **Notes** for the review.

In the detail area:

1. The **Review Categories** you set up previously in the Review Types maintenance function appear automatically, along with the **Weight** value.

2. Enter the **Rating** for the individual for each category.
3. The **Score** appears. The score = weight * rating.
4. Enter any comments or notes for that category in the **Notes** field.
5. The **Overall Score** is calculated as the sum of the scores in each category.

Individuals Screen - Skills/Tests Tab



The **Skills/Tests** tab tracks an individual's Skills as well as Tests the person has taken, along with dates and scores.

In the Skills section:

Maint

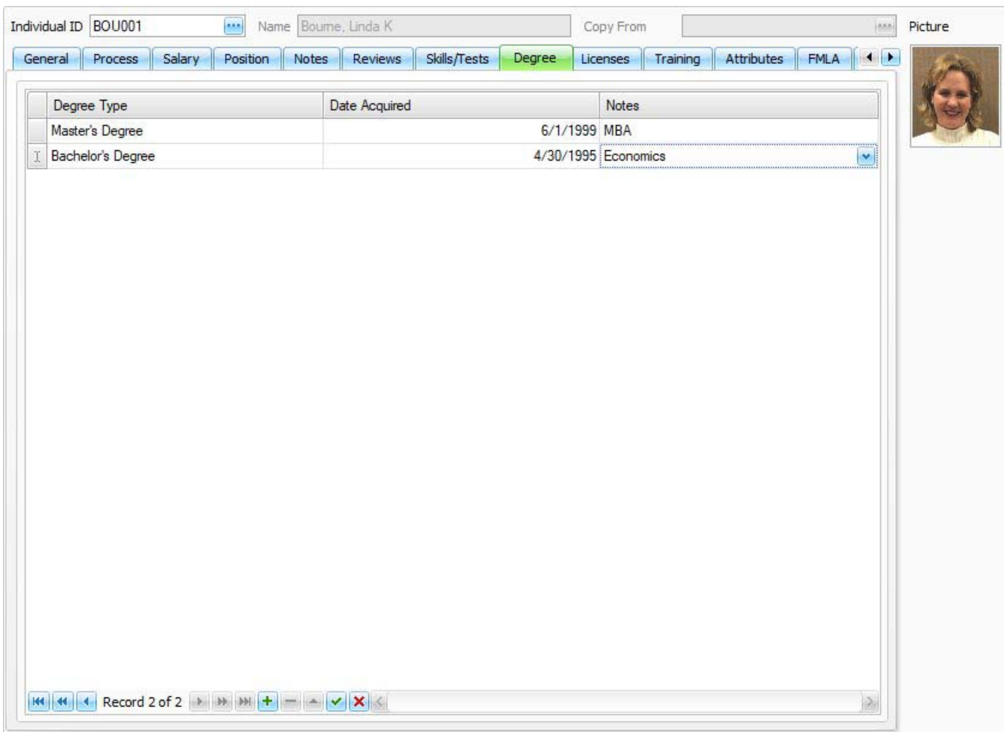
1. Select a **Skill Code** from the drop-down list.
2. Enter the date the skill was acquired in the **Date Acquired** field.
3. Enter the number of **Hours** the individual spent acquiring the skill or attending class, as applicable.
4. Enter any additional **Notes**.

In the Test section:

Maint

1. Select a **Test** code from the drop-down list.
2. Enter the date the test was completed in the **Date Acquired** field.
3. Enter the **Score** the individual achieved on the test, as applicable.
4. The **Recertification Date** and **Recertification Months** appear. The date and number of months are based on the recertification cycle set up for the Test.

Individuals Screen - Degrees Tab

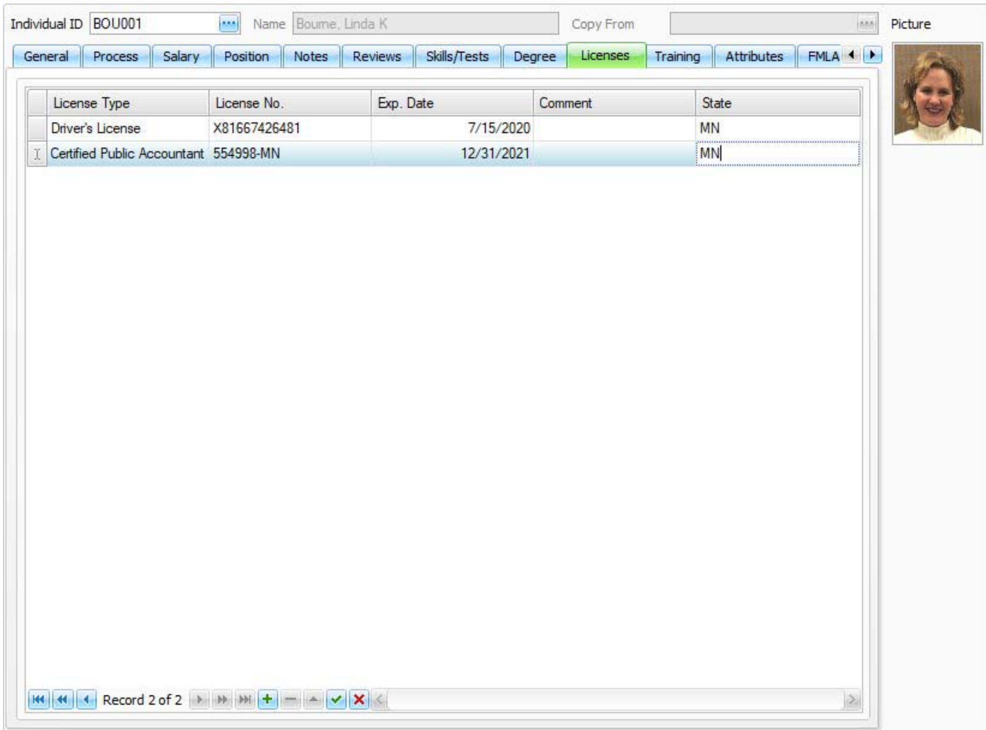


The **Degrees** tab tracks the degrees an Individual holds. An Individual may hold multiple degrees.

Maint

1. Select the **Degree Type**.
2. Enter the **Date Acquired** for the Degree.
3. Add any **Notes** about the degree.

Individuals Screen - Licenses Tab

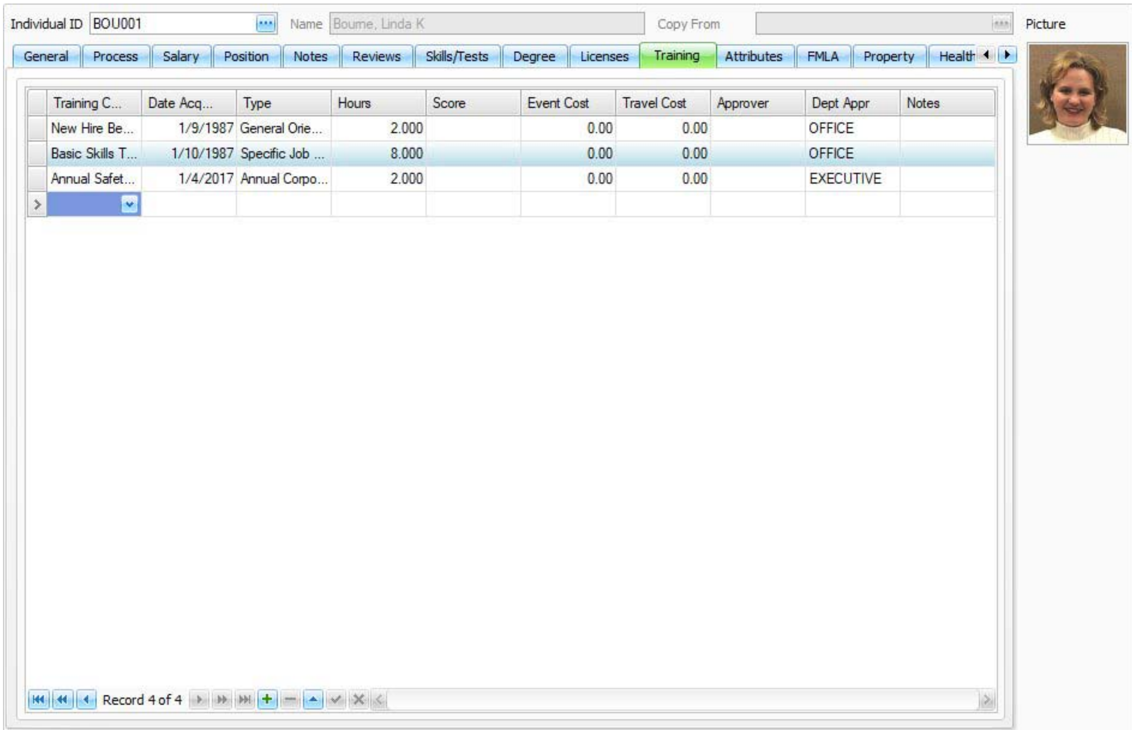


The **Licenses** tab tracks the licenses an individual holds. An individual may hold multiple licenses.

Maint

1. To add a **License Type**, use the **Add Record** button ( ) at the bottom of the screen and select a License Type from the drop-down list.
2. Enter the **License Number**.
3. Enter the **Expiration Date** for the license.
4. Enter a **Comment** regarding the license.
5. Select the **State** that issued the license.

Individuals Screen - Training Tab



The **Training** tab includes approval fields, cost, hours, and grade/score data for any training the Individual has had.

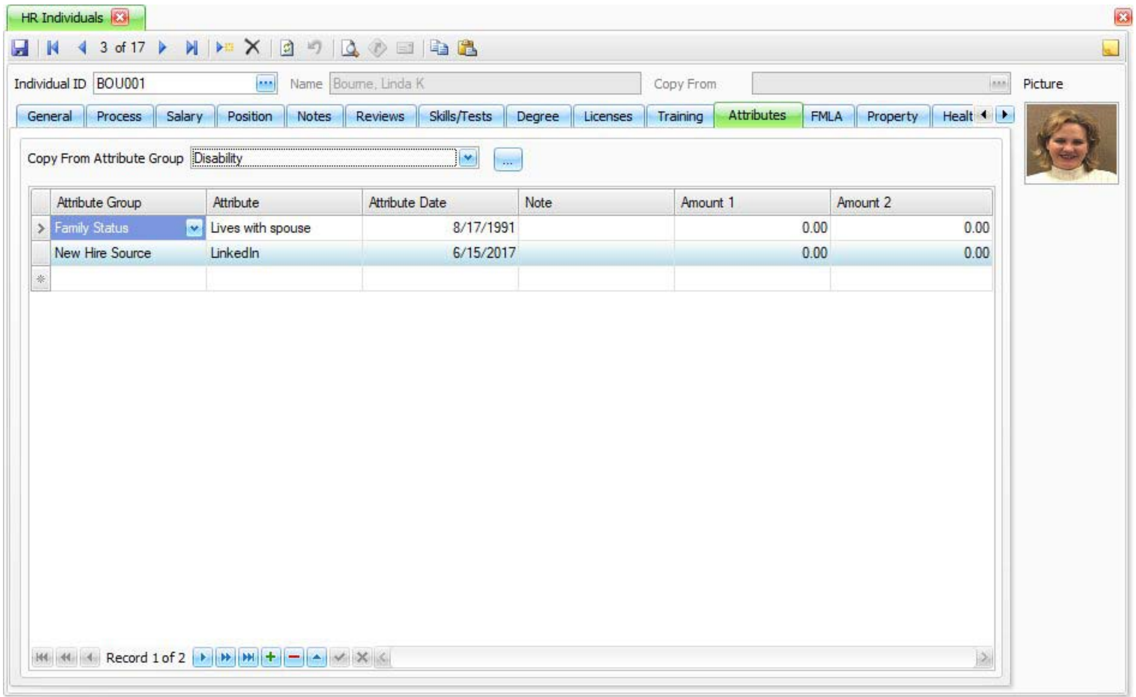
Maint
1. Select a **Training Code**.
2. Enter the date the skill or training was acquired in the **Date Acquired** field.

Maint
3. Select the **Type** of training from the drop-down list.
4. Enter the time spent attending class or acquiring skills in the **Hours** field.
5. Enter the grade/score received in training in the **Score** field.
6. Enter the **Event Cost** of the training, if there was a cost incurred.
7. Enter the **Travel Cost** for the training, if there was a cost incurred.
8. Select the individual who approved the training in the **Approver** field.

Maint
9. Select the department that approved the training from the **Dept. Appr** drop-down list.
10. Enter any **Notes** about the training (up to 500 characters).

11. Click the **Save** button on the toolbar to save your changes.

Individuals Screen - Attributes Tab



The **Attributes** screen is used to record the attributes of each individual in the various Attribute Groups.

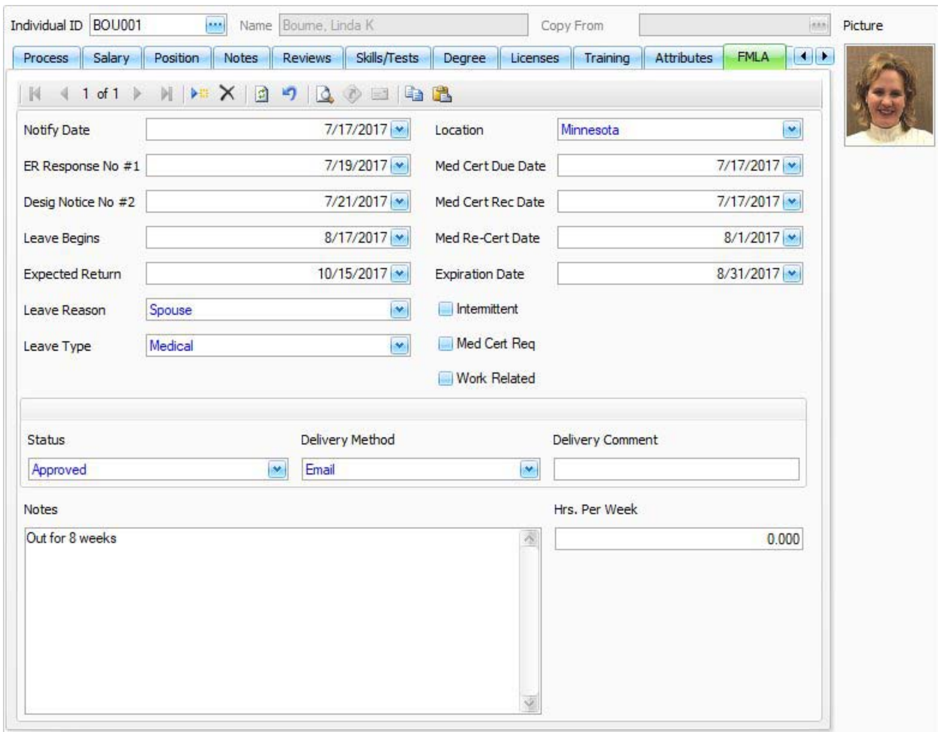
1. Select a **Copy From Attribute Group** from the drop-down list. The Attributes in use will be indicated in the drop-down list.

   Select the **Copy** button to copy the Attributes records set up for the Attribute Code into the Individual.

2. To manually add a new attribute press the **Add Record** button ( ) at the bottom of the screen.
3. Select an **Attribute** from the drop-down list.
4. Enter the effective date for the attribute in the **Attribute Date** field.
5. Enter any **Notes** for the attribute.
6. Enter an **Amount 1** for the attribute, if applicable. Enter a second **Amount 2** for the attribute, if applicable.

7. When you have finished with entering attributes for one Attribute Group, you may select a different Attribute Group from the drop down list and add Attributes for that group for the same Individual.

Individuals Screen - FMLA Tab



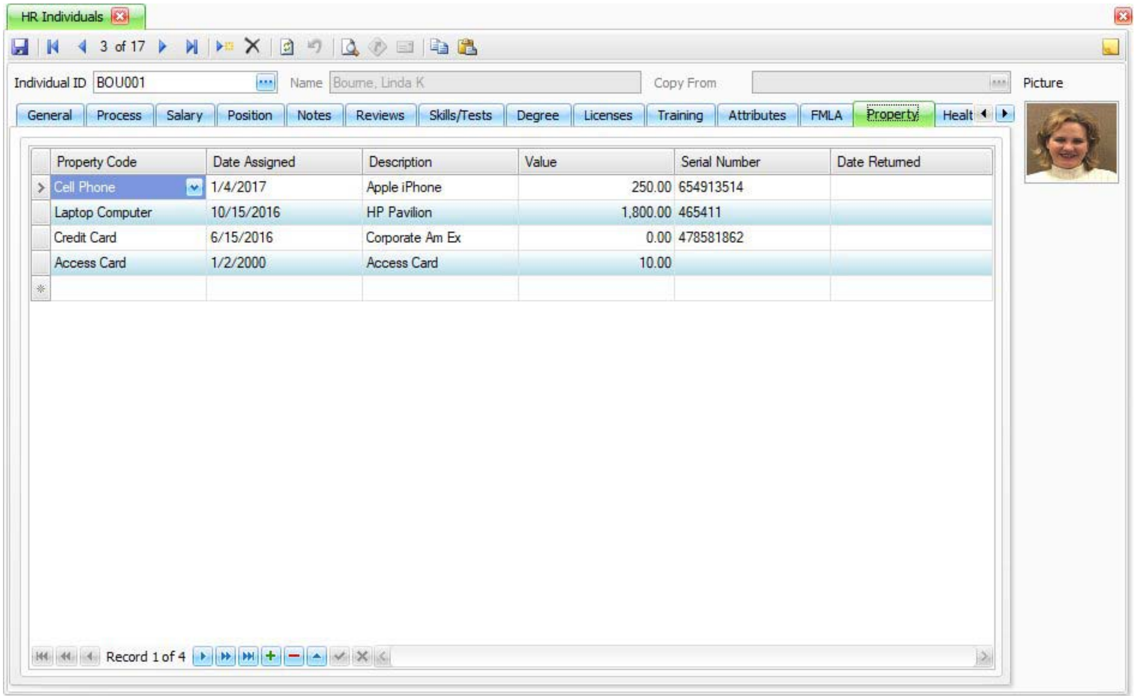
The Family and Medical Leave Act of 1993 (**FMLA**) is a United States labor law requiring covered employers to provide employees with job-protected and unpaid leave for qualified medical and family reasons.

The **FMLA** tab tracks family medical leave including leave dates, reasons, and approvals.

1. Click the **New Record** icon  on the tab's toolbar to add a new FMLA record.
2. Enter or edit the date the individual notified you of the leave in the **Notify Date** field.
3. Enter the date of the employer's first response to the request in the **ER Response #1** field.
4. Enter the date of the response to the second step of the interactive process in the **Desig Notice #2** field.
5. Enter the date the **Leave Begins**.
6. Enter the **Expected Return** date.

7. Select a **Leave Reason**.
8. Select a **Leave Type**.
9. Select a **Location** for the leave.
10. Enter the date the medical certification is due in the **Med Cert Due Date** field.
11. Enter the date of the medical re-certification in the **Med Re-Cert Date** field.
12. Enter the **Expiration Date** of the certification.
13. Mark the **Intermittent** check box if the issue is intermittent.
14. Mark the **Med Cert Req** check box if medical certification is required.
15. Mark the **Work Related** check box if the leave is work-related.
16. Select the approval **Status**.
17. Select the **Delivery Method** for the approval.
18. Enter any comments related to the delivery in the **Delivery Comment** field.
19. Enter any **Notes** related to the leave.
20. Enter the **Hours Per Week** for the leave.

Individuals Screen - Property Tab

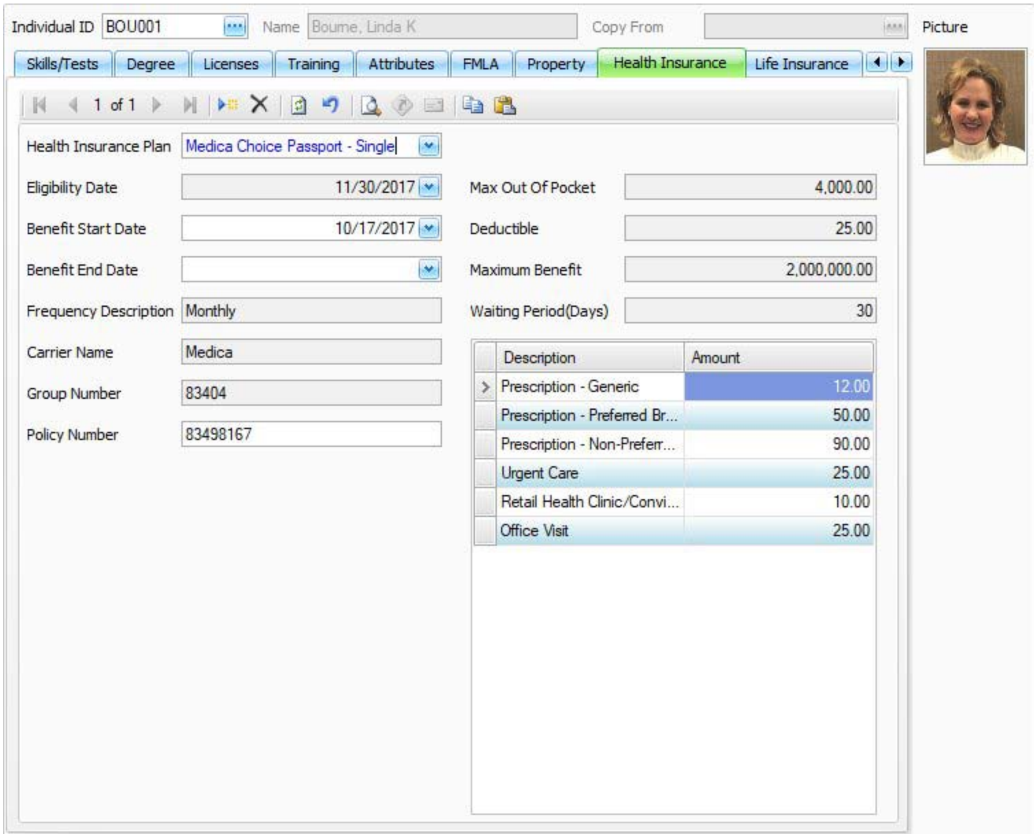


The **Property** tab tracks company property that has been assigned to an Individual.

Maint

1. Click the **Add Record** button ( ) at the bottom of the screen to add a new **Property Code**, or select a Property Code to edit.
2. Enter or edit the date the Property was assigned to the Individual in the **Date Assigned** field.
3. Enter a **Description** of the Property.
4. Enter the current **Value** of the Property.
5. Enter the **Serial Number** for the Property, if applicable.
6. Enter the **Date Returned** for the Property, if applicable. This field may be left blank.

Individuals Screen - Health Insurance Tab



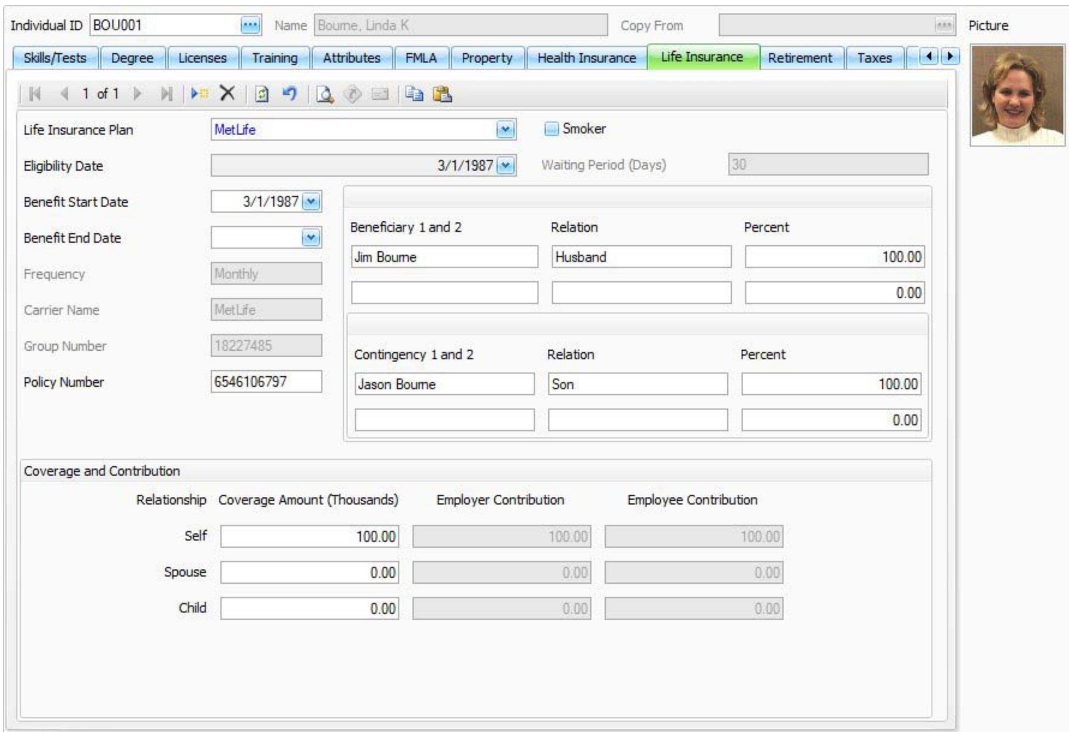
1. Click the **New Record** icon  on the tab's toolbar to add a new Health Insurance Plan for the Individual, or select a Plan to edit.

Maint

2. Select the appropriate **Health Insurance Plan** for the Individual.
3. The Individual's **Eligibility Date** is displayed and cannot be edited. The Eligibility Date is calculated from the Health Plans setup Waiting Period days.
4. Enter the **Benefit Start Date**.
5. Enter the **Benefit End Date**, as applicable.
6. The **Frequency Description**, **Carrier Name**, and **Group Number** are displayed from the setup of the selected Health Insurance Plan.
7. Enter the Individual's **Policy Number**.

8. The rest of the fields are pulled from information set up in Health Plans maintenance, and can only be edited there: **Max Out of Pocket**, **Deductible**, **Maximum Benefit**, **Waiting Period(Days)**, and the medical benefits.

Individuals Screen - Life Insurance Tab



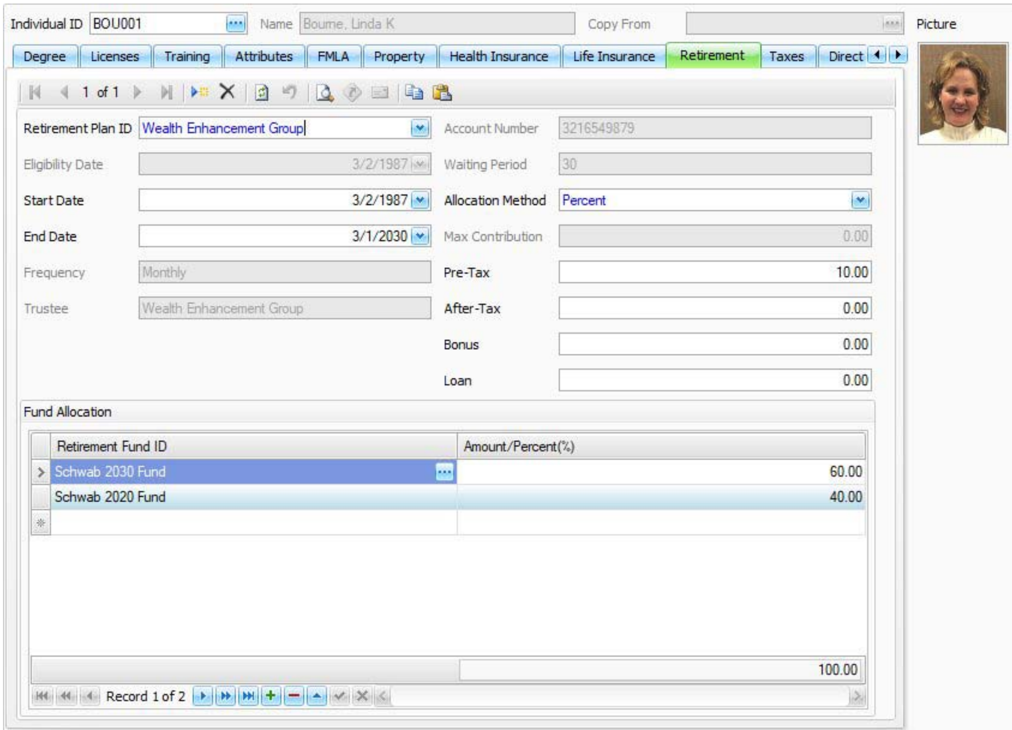
1. Click the **New Record** icon  on the tab's toolbar to add a new Life Insurance Plan for the Individual, or select a Life Insurance Plan to edit.

Maint

2. Select the appropriate **Life Insurance Plan** from the drop-down list. Note that only one plan can be in effect for the Individual.
3. Mark the **Smoker** check box if the Individual smokes. With the check box marked, the Smoker columns in the Life Insurance Plan setup will be used.
4. Enter the **Benefit Start Date**.
5. Enter the **Benefit End Date**, as applicable.
6. Enter the Individual's **Policy Number**.
7. Enter the names of the first and second beneficiaries in the **Beneficiary 1 and 2** fields as applicable. These fields may be left blank.

8. Enter the **Relation** of each beneficiary to the Individual, as applicable.
9. Enter the **Percent** each beneficiary should receive. The total must equal 100.
10. Enter the names of the first and second contingent beneficiaries in the **Contingency 1 and 2** fields. These fields may be left blank.
11. Enter the **Relation** of each contingent beneficiary to the Individual, as applicable.
12. Enter the **Percent** each contingent beneficiary should receive. The total must equal 100.
13. In the **Coverage Amount Self** field, enter the number of dollars (in thousands) of coverage for the Individual.
14. In the **Coverage Amount Spouse** field, enter the number of dollars (in thousands) of coverage for the Individual's spouse.
15. In the **Coverage Amount Child** field, enter the number of dollars (in thousands) of coverage for each of the Individual's children listed on the Dependents tab.
16. The rest of the fields are pulled from information set up in Life Insurance Plans maintenance, and can only be edited there: **Employer Contribution** and **Employee Contribution**.

Individuals Screen - Retirement Tab



1. Click the **New Record** icon  on the tab's toolbar to add a new Retirement Plan for the Individual, or select a Retirement Plan to edit.

Maint

2. Select the appropriate retirement plan from the **Retirement Plan ID** drop-down list.
3. The **Eligibility Date** is displayed. The Eligibility Date is calculated from the Individual's Start Date and the Waiting Period in the Retirement Plan setup.
4. Enter the **Start Date**.
5. Enter the **End Date**, as applicable.
6. The **Frequency**, **Trustee**, **Account Number**, and **Waiting Period** are displayed for information purposes only. These fields are populated from the setup of the Retirement Plan selected.

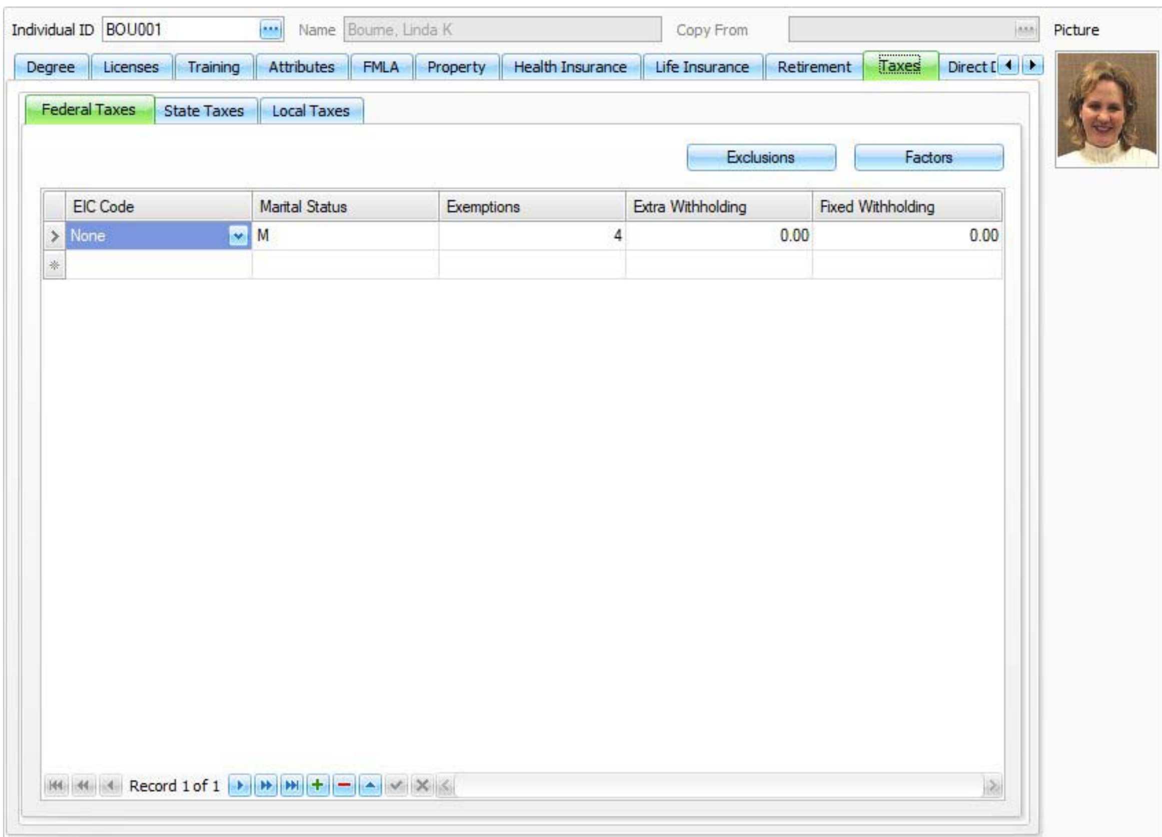
Maint

7. Select the **Allocation Method**, determined by the Individual-specified contributions: **Percent** or **Amount**.
8. Enter the **Pre-Tax** amount of the contribution, if applicable.
9. Enter the **After-Tax** amount of the contribution, if applicable.

10. Enter the amount to be deducted from the Individual's **Bonus**, if applicable.
11. Enter any outstanding **Loan** against the retirement plan, if available and applicable.
12. For each **Fund Allocation** in the plan (Use the **Add Record** button (+) at the bottom of the screen to add fund codes.):
13. Select the **Retirement Fund ID**.
14. Depending on the Allocation Method, enter the **Percent** or **Amount** allocated to the fund.

    The total allocation of all funds must add up to 100 percent.

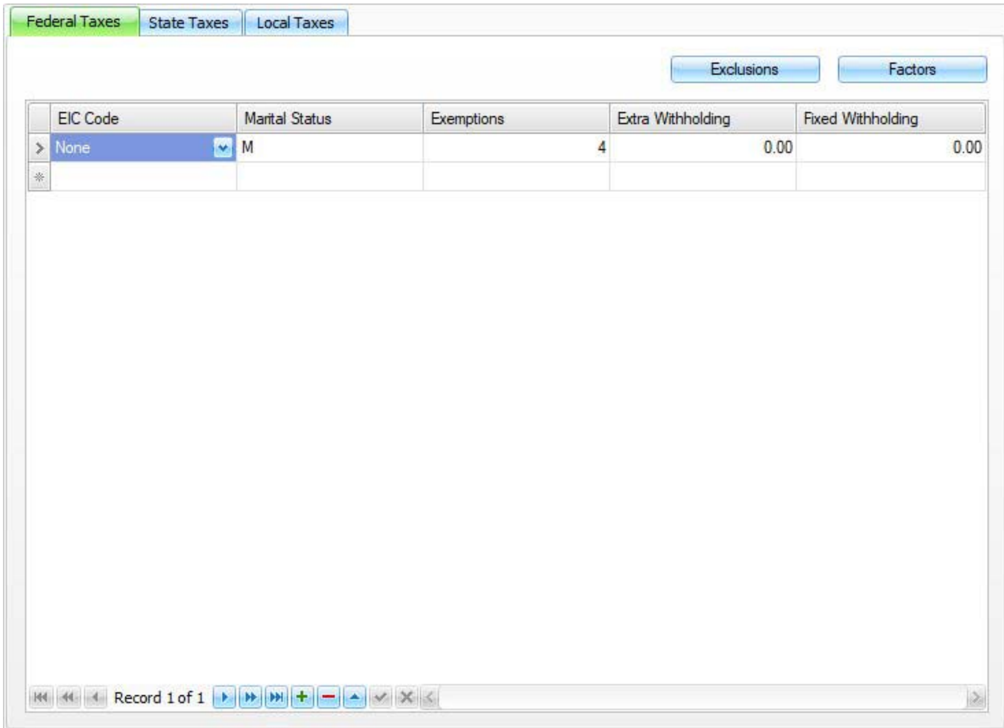
Individuals Screen - Taxes Tab



Update **Federal**, **State**, and **Local Taxes** in the **Taxes** tab. These can be entered through HR and updated into Payroll. For further information on entering tax data, consult the TRAVERSE Payroll Training Manual.

1. Select the **Federal Taxes**, **State Taxes**, or **Local Taxes** tab with which to work.

Federal Taxes Tab



2. Use the **Federal Taxes** tab to set up federal withholding information for the Employee.
3. Select the **EIC Code** for the Individual:
   - **N** - No advanced earned income credit payments were requested.

NOTE: For payroll year 2011 and after, the status for all Employees must be N. Legislation has changed the Earned Income Credit to a tax credit claimed on the Employees tax return filed for the previous tax year. No advanced pay is given to those Employees that qualify for the Earned Income Credit.

Maint

4. Select the **Marital Status** of the Employee. Use the Payroll Status Codes function to set up new Status Codes for your company. This is their claiming Status from the Individual's W-4 form. This will determine the tax table to use when calculating withholding taxes for the Individual.
5. Enter the number of **Exemptions** the Individual claims for Federal Taxes.

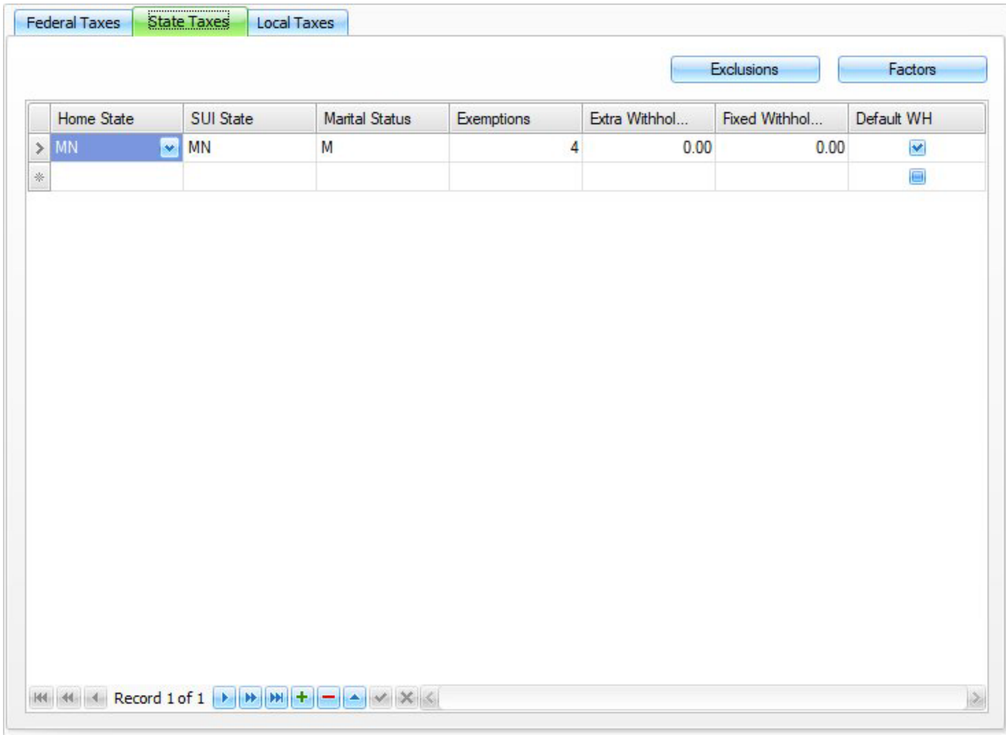
NOTE: To make an Individual exempt from Federal Taxes, but still print a W-2 for the Individual at the end of the year, enter 99 Exemptions.

6. Enter the amount of **Extra Withholdings**, in dollars, the Individual wants withheld in addition to the Federal withholding. If the Individual does not want any extra withholding, enter 0.00.
7. Enter a **Fixed WH** dollar amount to withhold. If an amount is entered here, the Federal Withholding (FWH) will use this dollar amount instead of the calculated amount. Leave this field at 0.00 if you do not want a fixed amount to be withheld for the Individual.

Command Buttons

Name	Description
Exclusions	Display the Federal Exclusions dialog box. See the Exclusions section below for more details.
Factors	Display the Override Factors dialog box. See the Factors section below for more details.

State Taxes Tab



Maint

1. Select the **WH State** for the Individual. To set up State Withholding Tax Authorities, use the Tax Authority Setup function (page 3-19) on the Codes Maintenance menu.

Maint

2. Select the State to which the employer pays **SUI** (State Unemployment Insurance). To exclude the Employer from paying State Unemployment Insurance to a particular State, click on the **Exemptions** button with the State you want the Individual exempted, and select the Employer Taxes tab. Select SUI to exempt the Employer from paying SUI tax for this Individual in this State.

    Example: If the selected Individual works in both Wisconsin and Minnesota, but Wisconsin does not collect unemployment insurance for the Individual, select Minnesota as the SUI State for the Minnesota WH State, select WI as the SUI for the State Wisconsin. Click on the Exclusions button and then go to the Employer Taxes tab and select SUI.

Maint

3. Select the Individual’s **Status** for the State Withholding. To set up Status Codes, use the Payroll Status Codes function. This is their claiming Status from the Individual’s W-4 form. This will determine the tax table to use when calculating withholding taxes for the Individual.

4. Enter the number of **Exemptions** the Individual claims for state taxes.

NOTE: To make an Individual exempt from state taxes, but still print a W-2 for the Individual at the end of the year, enter 99 Exemptions.

5. Enter the dollar amount of **Extra Withholding** the Individual wants withheld in addition to the State Withholding. If the Individual does not want any Extra Withholding, enter 0.00.

6. Enter a **Fixed Withholding** dollar amount to withhold. If an amount is entered here, the State Withholding (SWH) will use this amount instead of the calculated amount. Leave this field at 0.00 if you do not want a fixed amount to be withheld for this Individual.

7. To use the selected state as the Individual's **Default WH State**, select the box; otherwise, clear the box.

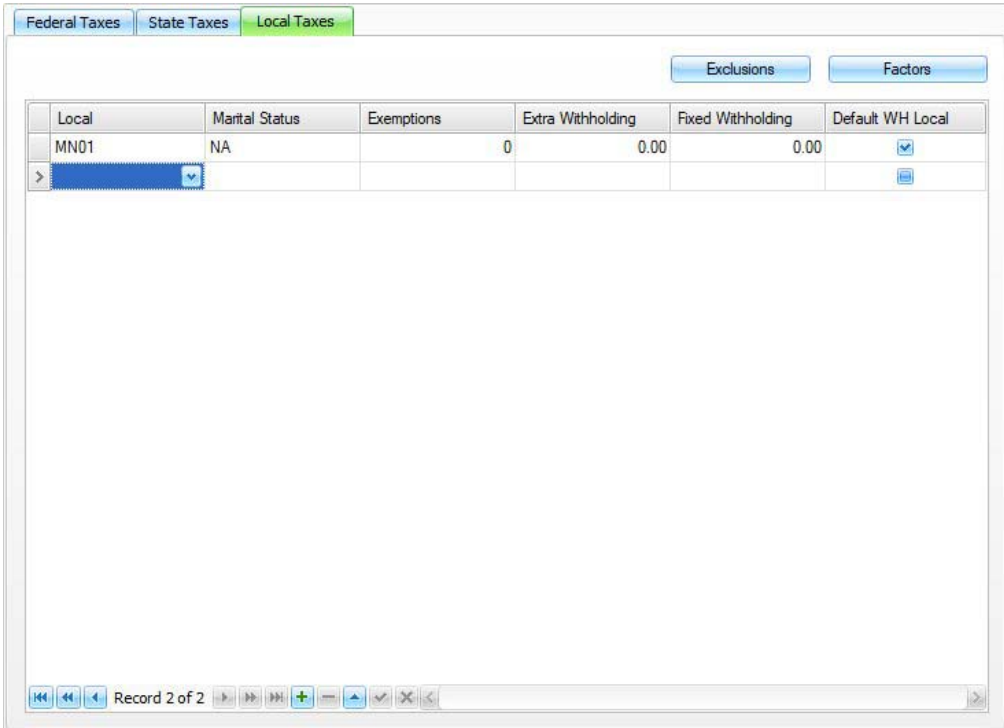
NOTE: One State *must* be selected as the Individual's Default WH State, however, the Default Withholding State can be overridden during Payroll time ticket entry.

Withholding information for the Default State is printed on the federal W-2 form. Withholdings for each of the remaining States are printed on separate W-2 forms (one for each State).

Command Buttons

Name	Description
Exclusions	Display the State Exclusions dialog box. See the Exclusions section below for more details.
Factors	Display the Override Factors dialog box. See the Factors section below for more details.

Local Taxes Tab



Maint

1. Select the **Local** Withholding Code for the Individual. The Local Code will appear with the State Code and Local Code combined. To set up Local Withholding Tax Authorities, use the Tax Authority Setup function (page 3-23) on the Codes Maintenance menu.

Maint

2. Select the **Status** of the Individual for the Local Withholding Code. To set up Status Codes, use the Payroll Status Codes. This is their claiming Status from the Individual's W-4 form. This will determine the tax table to use when calculating withholding taxes for the Individual.

3. Enter the number of **Exemptions** the Individual claims for local taxes.

NOTE: To make an Individual exempt from local taxes, but still print a W-2 for the Individual at the end of the year, enter 99 Exemptions. This is only valid if your local Table and Formula have Exemptions built into the Table and Formula.

4. Enter the dollar amount of **Extra Withholding** the Individual wants withheld in addition to the local withholding. If the Individual does not want any extra withholding, enter 0.00.

5. Enter in a **Fixed Withholding** dollar amount to withhold. If you enter an amount here, the Local Withholding (LWH) will use this amount instead of the calculated amount. Leave this field at 0.00 if you do not want a fixed amount to be withheld for this Individual.
6. To use the selected locality as the Employee's **Default WH Local**, select the box; otherwise, clear the box.

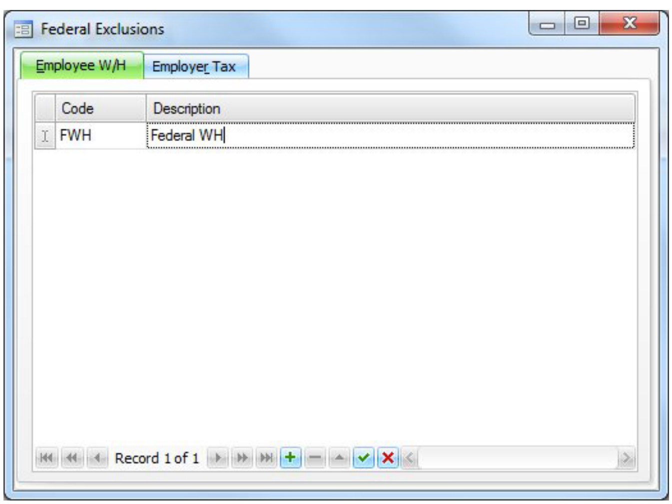
NOTE: One locality *must* be selected as the Individual's Default WH Local, however, the Default Withholding Local can be overridden during Payroll time ticket entry.

Withholding information for the Default locality is printed on the federal W-2 form. Withholdings for each of the remaining localities are printed on a separate W-2 forms (one for each locality).

Command Buttons

Name	**Description**
Exclusions	Display the Local Exclusions dialog box.
Factors	Display the Override Factors dialog box.

Exclusions Dialog Box—Employee Withholding Tab



If an Individual is not subject to a particular Federal, State, or Local Withholding, use the Exclusions dialog box--**Employee W/H** tab to exclude the withholding from the Individual.

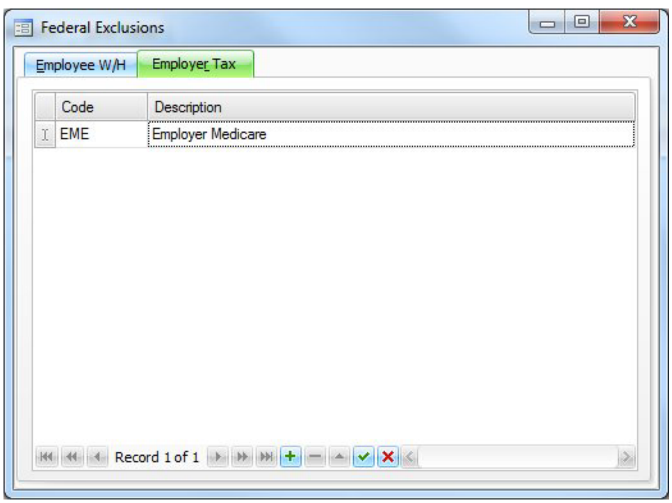
NOTE: If you exclude an Individual from a withholding tax using this function they will not get a W-2 printed at the end of the year. To make an Individual Exempt from withholding taxes, but still print a W-2 for the Individual at the end of the year, enter 99 Exemptions in the Exemptions field on the Federal, State or Local Taxes tab.

1. Select the **Federal**, **State**, or **Local Tax Code** to exclude from Individual withholdings for the Individual.

NOTE: To exclude the employer from paying State Unemployment Insurance to a particular state, click on the Exemptions button with the State you want the Individual exempted, and select the Employer Taxes tab. Select SUI to exempt the employer from paying SUI tax for this Individual in this State.

2. A **Description** of the tax code is displayed.

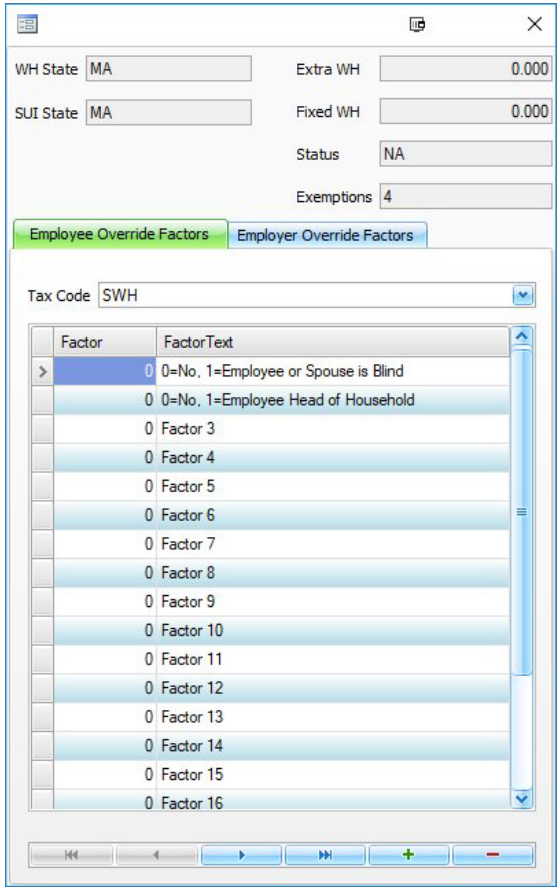
Exclusions Dialog Box—Employer Tax Tab



If an employer is not subject to a certain Federal, State, or Local Tax for a particular Individual, use the Exclusions dialog box--Employer Tax tab to exclude the tax from the employer.

1. Select the **Federal**, **State**, or **Local Tax Code** to exclude from the Employee when calculating employer withholdings and Costs.
2. A **Description** of the tax Code is displayed.

Override Factors Dialog Box

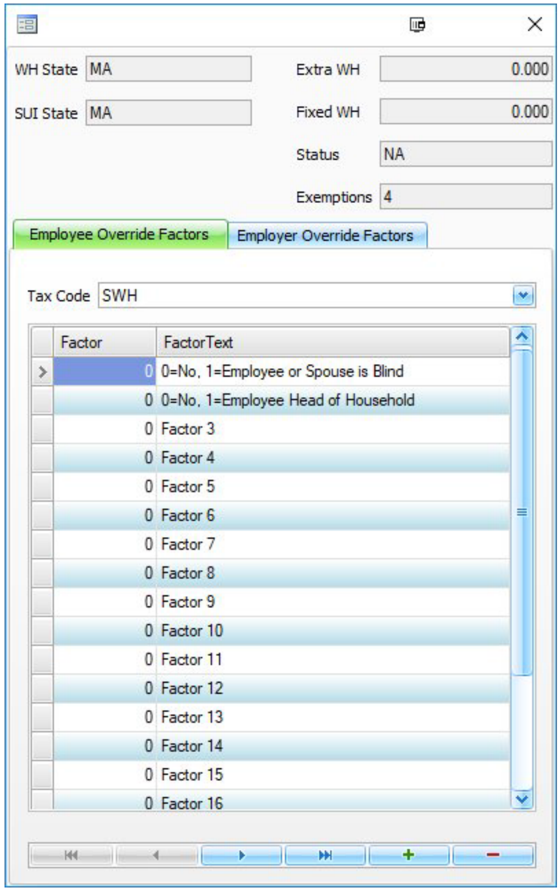


The Override Factors dialog box will appear when you click on the **Factors** button on the State or Local Taxes tab. If an Override Factor has been set up for the state or local tax selected in the Payroll Tax Factor Prompts function you will be prompted to click on the Factors button and enter a Factor for the Individual when you save the State Withholding record.

1. The withholding **State** selected on the **Taxes** tab to enter Override Factors for is displayed.
2. The **Locality** selected on the **Taxes** tab to enter Override Factors for is displayed.
3. The **Extra WH** amount the Individual is withholding in addition to the Federal, State, or Local withholdings is displayed.
4. The **Fixed WH** amount being withheld for the Individual is displayed.
5. The **Status** of the Individual for the tax is displayed.

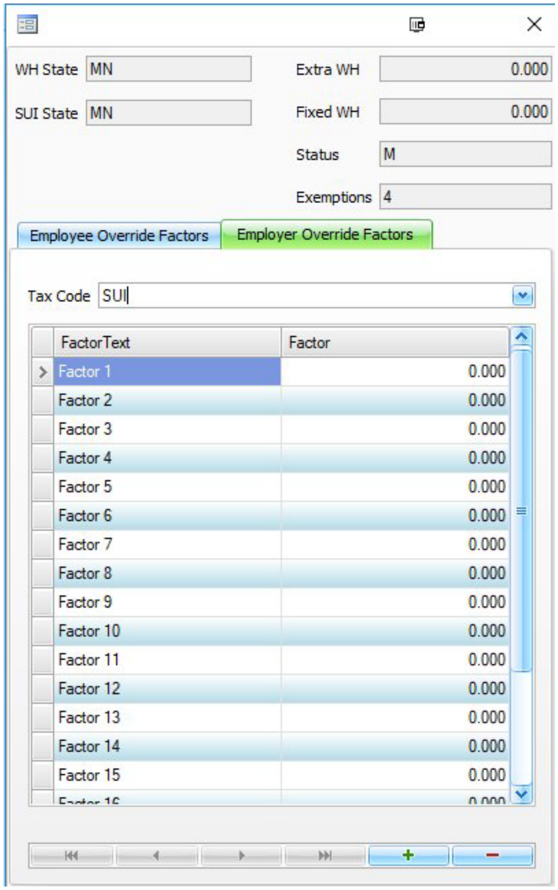
6. The number of **Exemptions** the Individual is claiming is displayed.

Override Factors Dialog Box—Employee Tab



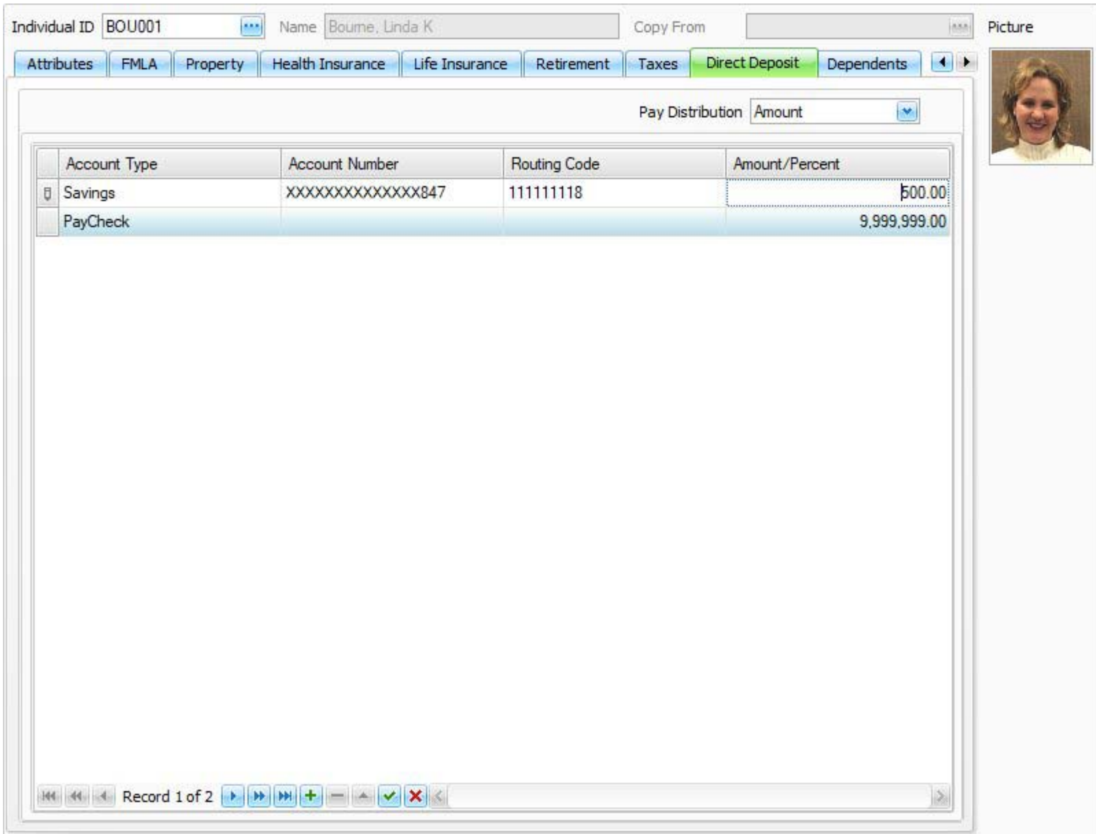
7. Select the **Tax Code** for which to enter the Overriding Factor.
8. Enter the **Factor** amount into the Factor field for those that have a **Factor Text**.

Override Factors Dialog Box—Employer Tab



9. Select the **Tax Code** for which to enter the Overriding Factor.
10. Enter the **Factor** amount into the Factor field for those that have a **Factor Text**.

Individuals Screen - Direct Deposit Tab



Use the **Direct Deposit** tab to record the Individual's Direct Deposit information. You may enter up to six distributions per Individual.

After you've set up Individuals for Direct Deposit, use the Payroll **Create Prenotification File** function to create the Prenotification File you send to your bank. You must create this file before you can Calculate Checks or Print Vouchers.

1. Select how the Individual's net pay should be divided in the **Pay Distribution** field: **None**, **Amount**, or **Percent**. If you select None the Individual will only receive a pay check.

   If you select **Percent**, the total percent appears in the **Total** box at the bottom of the tab. This Total must equal 100 before you can exit the tab; if it doesn't, a warning message appears.

2. Select the **Account Type**: **Checking**, **Savings**, or **Paycheck**.

3. Select the **Prenote In** box when your bank notifies you that the Prenotification File was successfully received for this Individual; otherwise, clear the box. If the box is cleared, vouchers are not created for the selected Individual.

    When the Prenotification File is created there is an option to check this box automatically once the Prenotification File is made. If you elected to not have the Create Prenotification function check the box, you must manually check the box for vouchers to be made.

    You must run the Create Prenotification function to make the Prenote File, to be able to print vouchers. If you manually check the box and do not make the Prenote File you will not get a voucher calculated.

4. Enter the Individual's bank **Account Number**. If you edit the Account Number, the system clears the Prenote In box. You must submit a new Prenotification File before you can process checks for the Individual.

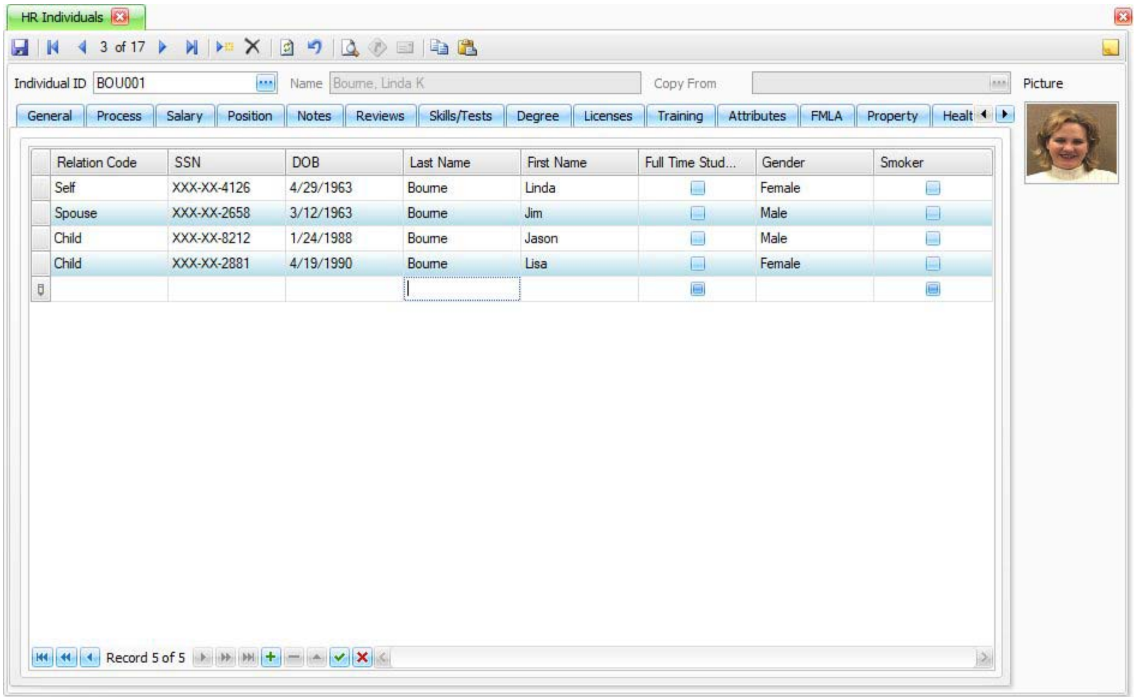
5. Enter the Individual's bank **Routing Code**. If you edit the Routing Code, the system clears the Prenote In box. You must submit a new Prenotification File before you can process checks for the Individual.

6. If the Individual's Direct Deposit is divided by Amount, enter the net amount of the Individual's pay to be deposited into each of the specified Bank Accounts in the **Amount/Percent** box. If any net pay remains after the distributions are made, TRAVERSE generates a check for the remaining amount.

    If the Individual wants a fixed amount deposited and a balance remains (as a result of working overtime, for example), enter 9999999.99 in the Amount/Percent on a Paycheck line. TRAVERSE then generates a check for the Individual for the balance not directly deposited.

7. If the Individual's direct deposit is divided by Percent, enter the percentage of the Individual's pay to be deposited into each of the specified Bank Accounts in the **Amount/Percent** box. The sum of the percentages you enter must equal 100. If it does not, a warning message appears. The **Total** percent appears in the Total box at the bottom of the screen.

Individuals Screen - Dependents Tab



The information on the **Dependents** tab is used for Life Insurance and Health Insurance plan enrollment. Up to one spouse and any number of children can be entered.

1. Click the **Add Record** button ( ) at the bottom of the screen to add a new Dependent record or select a Dependent record to edit.
2. Select a **Relation Code** for the Dependent.

Maint

3. Enter the Dependent's Social Security Number in the **SSN** field. Only the last four digits will display. The system will check to make sure the SSN does not match one already in the system to avoid duplication of records.
4. Enter the Dependent's date of birth in the **DOB** field.
5. Enter the Dependent's **Last Name**.
6. Enter the Dependent's **First Name**.
7. Mark the **Full-Time Student** check box if the Dependent is a full-time student.
8. Select the **Gender** of the Dependent.

Maint

9. Mark the **Smoker** check box if the Dependent is a smoker.

10. Click the **Save** button on the toolbar to save your changes.

Task Summary

To add an Individual, follow these steps:

1. Select the **New Record** icon on the toolbar. A blank Individuals screen appears.
2. Enter an **Individual ID** and **Name** for the new Individual.
3. Select the Individual to Copy From, if applicable.
4. Select each tab and enter the appropriate information.
5. Click the **Save** button , on the toolbar, to save the new Individual.

To edit an Individual, follow these steps:

1. Select the **Individual ID** of the Individual to edit.
2. Edit the appropriate information.
3. Click the **Save** button , on the toolbar, to save the edited Individual.

To delete an Individual, follow these steps:

1. Select the **Individual ID** of the Individual to delete.
2. Click the **Delete** button , on the toolbar, to delete the selected Individual.

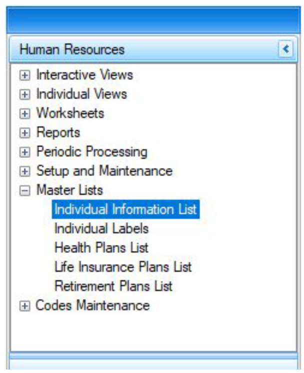
Producing an Individual Information List

Use the **Individual Information List** function to produce a list of Individuals and the Individual Information you defined in the Individuals function (page 3-153) on the Setup and Maintenance menu.

To produce the **Individual Information List**, follow these steps:

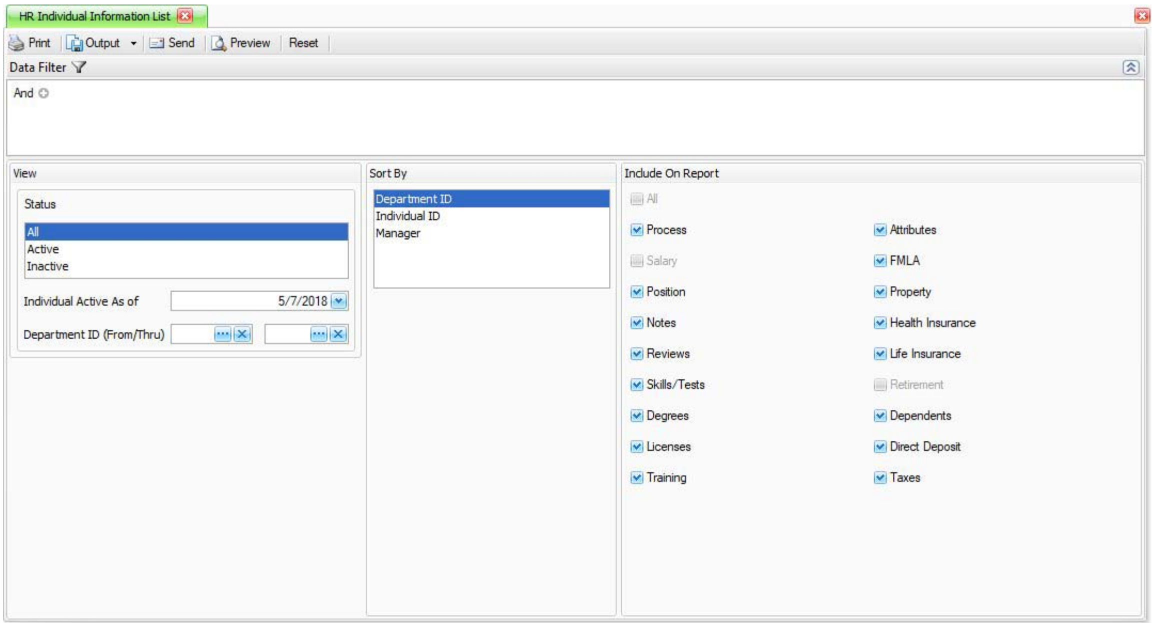
1. Select **Individual Information List** from the **Master Lists** menu.

Individual Information List Menu



2. The **Individual Information List** screen appears.

Individual Information List Screen



3. Select the range of **Filter Criteria** to include in the list or leave the fields blank to include all the Individual IDs.
4. Select the **Position Status** criterion for the list; **All**, **Active**, or **Inactive**.
5. Select the **Individual Active As of** date to include in the list.
6. Select the **Department ID From** and **Thru** if you want to view Individuals for a single Department or a range of Departments, otherwise leave the fields blank to include all Departments. Select the “X” button to clear the field.
7. Select the **Sort By** criterion for the list; **Department ID**, **Individual ID**, or **Manager**.
8. Select the information to **Include On Report** criterion for the list; **All**, **Process**, **Salary**, **Position**, **Notes**, **Reviews**, **Skills/Tests**, **Degrees**, **Licenses**, **Training**, **Attributes**, **FMLA**, **Property**, **Health Insurance**, **Life Insurance**, **Retirement**, **Dependents**, **Direct Deposit**, or **Taxes**. You may select any one or combination of these choices.

   The choices available will be dependent on the Group Permissions for the Individual selections. The tabs selected with permissions will be available to select or clear. The tabs cleared for permissions will be unavailable and not displayed on the report.

9. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Individual Information List

Continental Products Unlimited
Individual Information List
Sorted By Department ID

PAGE 1

Report Filter			
Individual Active As Of	10/17/2017	**Include On Report**	All
Department		**View**	All

Individual Name: BOU001 Bourne, Linda K

General Information

Address 1	501 N Hamilton Ave	**Date of Birth**	6/7/1953
Address 2		**Manager**	LUK001
City	Edina	**Marital Status**	Married
Region	MN	**Start Date**	1/9/1987
Postal Code	55435	**SSN**	459301099
Country	USA	**Labor Class**	President
Home Phone	6125551212	**Ethnicity**	White
Work Phone		**Veteran Status**	
Extensions		**Work Email**	info@osas.com
Cell Phone		**Home Email**	info@osas.com
Gender	Female	**Internet**	www.osas.com
Department ID	500	**Manager Name**	Lukas, George W
Department Name	EXECUTIVE		

Statutory Employee ☐ **Seasonal Employee** ☐ **Corporate Officer** ☐

Emergency Contact

Name	Work Phone	Home Phone	Contact Cell Phone	Relationship
Jim Bourne	6125673319	6125551212		Husband

Process Information

Process Description	Check List Item	Person Responsible	Date Completed	Completed
Software Training	Expense Report	Bourne, Linda K	10/16/2002	☑
Software Training	Compliance	Bourne, Linda K	1/4/2017	☑

Salary Information

Pay Type	Salary	Hourly Rate	Effective Date	Over Time Exempt	Reason

10/17/2017 3:02 PM Kent.Heitkamp

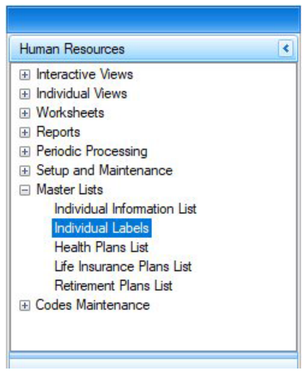
Producing Individual Labels

Use the **Individual Labels** function to produce virtually any size and style of standard or mailing labels for Individuals.

To produce **Individual Labels**, follow these steps:

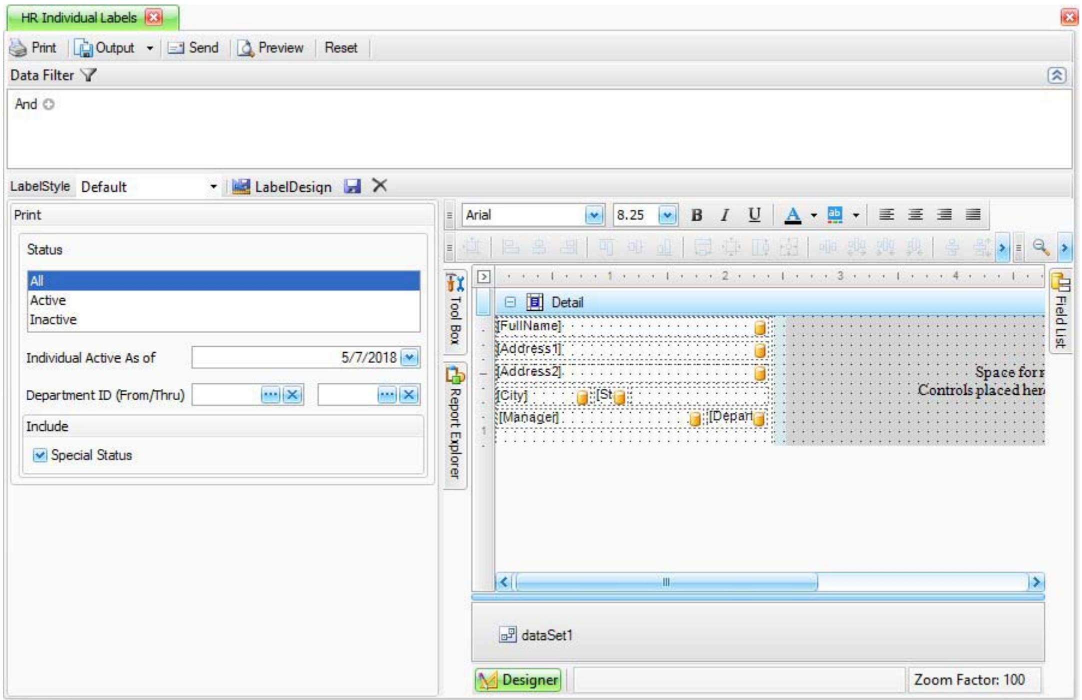
1. Select **Individual Labels** from the **Master Lists** menu.

Individual Labels Menu



2. The **Individual Labels** screen appears.
3. Click the **Design** button to display and edit the design of the label.

Individual Labels Screen



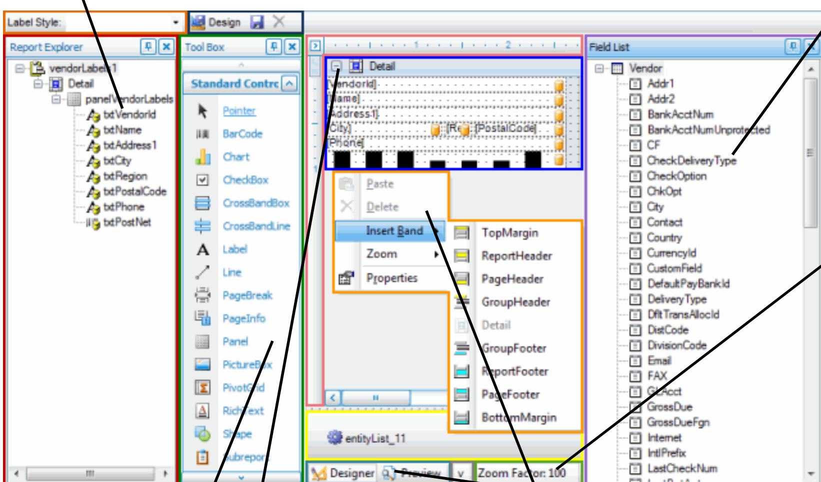
Details for Individual Label Screen

Report Explorer

Use this tab to navigate through elements of the label. You can use it when building a label to quickly access all of the elements of a label

Field List

Use this tab to view the schema of the datasource which is currently bound to the label. Also, this tab may be used to bind existing label controls to data, or to create new bound label controls. To do this, simply click the desired field



Toolbox

Use this tab to add standard controls to the label. Simply drag and drop an

Context Menu

Use this menu after right-clicking any element in the label designer area. It provides you quick access to

Zoom Panel

This section displays the current value of the zoom factor. To change the zoom factor at design time,

View Tabs

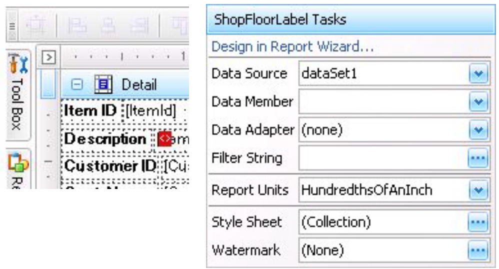
Use the Designer and Preview buttons to quickly switch between the two types of views during the design of the label. This may be extremely useful when a report is fully customized at

Band Strips, Expand/Collapse Buttons, and Editing

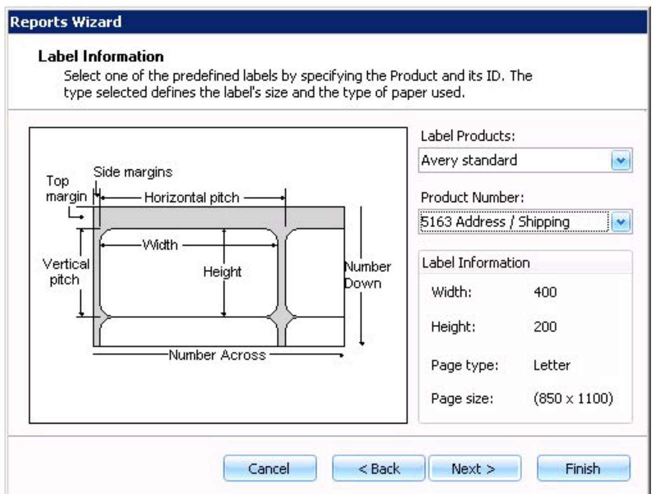
Use this section to

- See the band name, the band icon corresponding to its type, and the expand/collapse button.
- Expand/collapse a band strip by clicking the plus or minus sign adjacent to the band strip.

- Edit a label's field by double-clicking the field and editing the text as necessary. You can also right-click on the field and select Properties to edit additional properties of the field. Click the arrow button in the upper left corner of the label design to see the task menu.

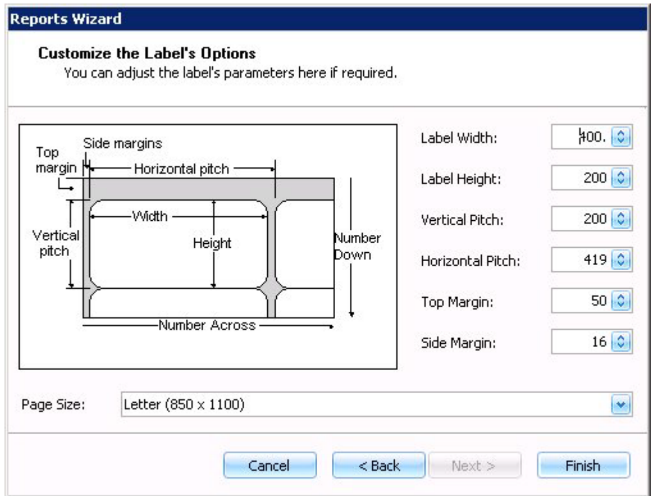


- Select **Design in Report Wizard** to use the design wizard to help design your label.



- Select the **Label Products** and **Product Number** you want to use to print labels.

- Click **Next** to move to the next screen.



- The **Label Width**, **Label Height**, **Vertical Pitch**, **Horizontal Pitch**, **Top Margin** and **Side Margin** are filled in from the defaults for the selected label product.
- Select the **Page Size** for the label being printed.
- Select **Finish** to save the label specifics you selected and return to the Print Labels screen.

Use the Individual Labels function to print 1 1/3 by 4 inch labels for mailings.

A POSTNET barcode, which is an extension of the 9-digit zip code used by the United States Postal Service, is printed on your labels if you chose that option using the Country Codes function of the System Manager.

1. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.
2. Select if you want to **Print** which **Position Status** for the labels printed; **All**, **Active**, or **Inactive**.
3. Select the **Individual Active As of** date to include in the labels.
4. Select the **Department ID From** and **Thru** if you want to print labels for Individuals for a range of Departments, or a single Department, otherwise leave the field blank to include all Departments. Select the “X” button to clear the field.

5. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Individual Labels

Bourne, Linda K 501 N Hamilton Ave Edina, MN 55435	Doubla, Mike K 459 1st Avenue Victoria, MN 553449999	Gerard, Timothy K 13330 E 32nd Ave Minneapolis, MN 55055
Jenkins, Kathy C 120024 Wright Blvd Apt 402 Minneapolis, MN 55055	Johnson, Steve W 8945 Shore Drive Wayzata, MN 553799129	Jonchim, Maria K 3321 W 52 Ave Minneapolis, MN 55055

4

Interactive Views

USING THE INTERACTIVE VIEWS MENU

With the functions on the Interactive Views menu, you can view but not change the following HR information:

- Processes
- Positions
- Review Types
- Type Codes

Use these functions if you need to examine (but not change) an Individual record, an address, a process assignment, skills, degrees, license expirations, training.

Using Interactive Views you can easily and quickly build and manipulate tables to display information. After selecting from the available criteria to display as filter fields, data items, column fields, or row fields, you can highlight columns and rows to have the selected rows and columns display as a graph below the table. To include multiple rows or columns in the graph, you can use the CTRL+ click (to select multiple rows or columns) and SHIFT+ click (to select all rows or columns between the first and second click) shortcuts, after selecting the first row and column.

Sorting and Filtering

When you arrange the columns to your liking, you can sort, group, or filter the data by the column's contents. To sort and filter the data, right-click a column heading and use the functions outlined in the table below.

Button	Name	Select To
	**Sort Ascending**	Sort the selected column’s data in ascending order. **NOTE: You can also accomplish this task by clicking the column heading until  appears.**
	**Sort Descending**	Sort the selected column’s data in descending order. **NOTE: You can also accomplish this task by clicking the column heading until  appears.**
	Clear Sorting	Remove all sorting options and revert to the default view.

Group By This Column	Group the identical entries from this column into a single group. **NOTE: If you group by column entry, you can right-click on the grouped column heading to select from the options outlined in this table, or choose Full Expand to expand all of the grouped entries, Full Collapse to collapse all of the grouped entries, or UnGroup to undo the grouped entry.**
Column Chooser	Open the Customization window. With the Customization window open, you can click and drag columns to the window to remove them from the screen or click and drag columns from the window to place them back onto the screen. **NOTE: You can also remove a column from the form by clicking on the heading of the column and dragging it to the bottom of the screen and releasing it when your cursor changes to an *X*.**
Best Fit	Adjust the selected column to resize the column for the best view of that column's data.
Clear Filter	Remove all filter options and revert to the default view.
Filter Editor	See "Filtering Across All Columns" in the General Information guide for more information.
Best Fit (all columns)	Adjust all columns to resize for the best view all of the data at once.

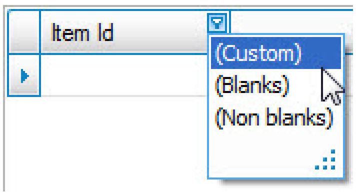
Filtering by an Individual Column

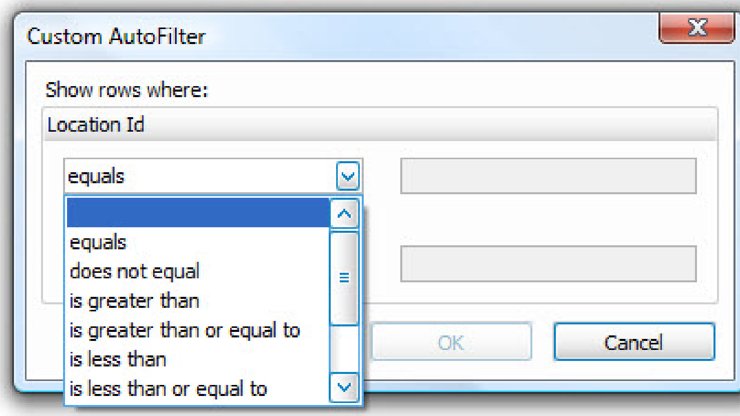
To create a filter for a single column, click the funnel icon that appears once you place the cursor in the associated column and then select a filter option from the dropdown menu.

Select	To
(Custom)	Enter criteria for filtering the selected column. **NOTE: View the following paragraph for additional information.**
(Blanks)	Display only entries with blank information in the selected column.
(Non blanks)	Display only entries with information in the selected column.

From the drop down menu, you can also select from the entries in the selected column to group the column by the selected entry.

If you select (**Custom**), the Custom AutoFilter function appears. Select up to two filtering criteria for the selected column from the drop down menus, then enter a string of text or numbers to complete the condition and click **OK**.





Sorting and Filtering Pivot Chart Data

Right-click on the pivot table gray area or a field button when in Pivot Chart View for each application, to use the following functions:

Select	To
Refresh Data	Refresh the data in the tables.
Hide	Remove the selected criterion from the table.
Order	Move the selected criterion to the beginning, left, right, or end of the list of criteria.
Show Field List	Open the PivotGrid Field List, then click and drag the applicable fields to the desired locations.

Select	To
	Close the PivotGrid Field List.

NOTE: Note: See instructions in the "Filtering Across All Columns" in the General Information guide for more information on filtering.

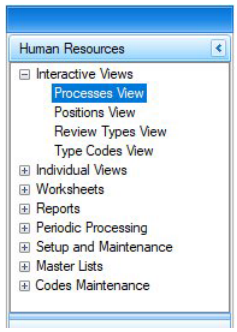
PROCESSES VIEW

Use the **Processes View** function to view the check list items for your company's Processes.

To use the **Processes View**, follow these steps:

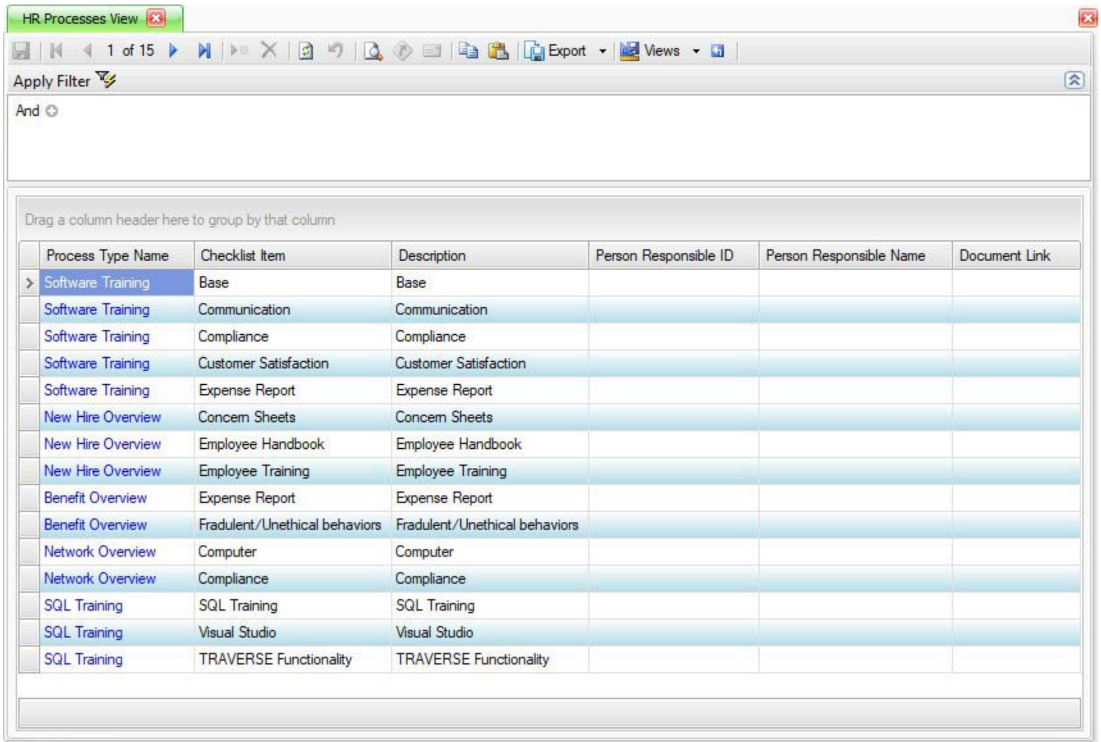
1. Select **Processes View** from the **Interactive Views** menu.

Processes View Menu



2. The **Processes View** screen appears.

Processes View Screen



Process Type Name	Checklist Item	Description	Person Responsible ID	Person Responsible Name	Document Link
Software Training	Base	Base			
Software Training	Communication	Communication			
Software Training	Compliance	Compliance			
Software Training	Customer Satisfaction	Customer Satisfaction			
Software Training	Expense Report	Expense Report			
New Hire Overview	Concern Sheets	Concern Sheets			
New Hire Overview	Employee Handbook	Employee Handbook			
New Hire Overview	Employee Training	Employee Training			
Benefit Overview	Expense Report	Expense Report			
Benefit Overview	Fradulent/Unethical behaviors	Fradulent/Unethical behaviors			
Network Overview	Computer	Computer			
Network Overview	Compliance	Compliance			
SQL Training	SQL Training	SQL Training			
SQL Training	Visual Studio	Visual Studio			
SQL Training	TRAVERSE Functionality	TRAVERSE Functionality			

3. Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.

4. Double click on the blue **Process Type Name** field to drill down to the Process Type setup screen.

5. Refer to the **Using the Interactive Views Menu** section a the beginning of this chapter and the Interactive Views section in the General Information guide for more details on using the Processes View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

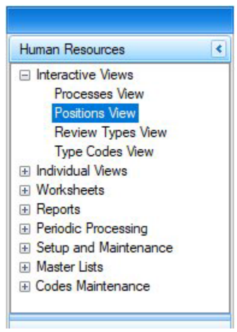
POSITIONS VIEW

Use the **Positions View** function to view information about the Positions available in your company.

To use the **Positions View**, follow these steps:

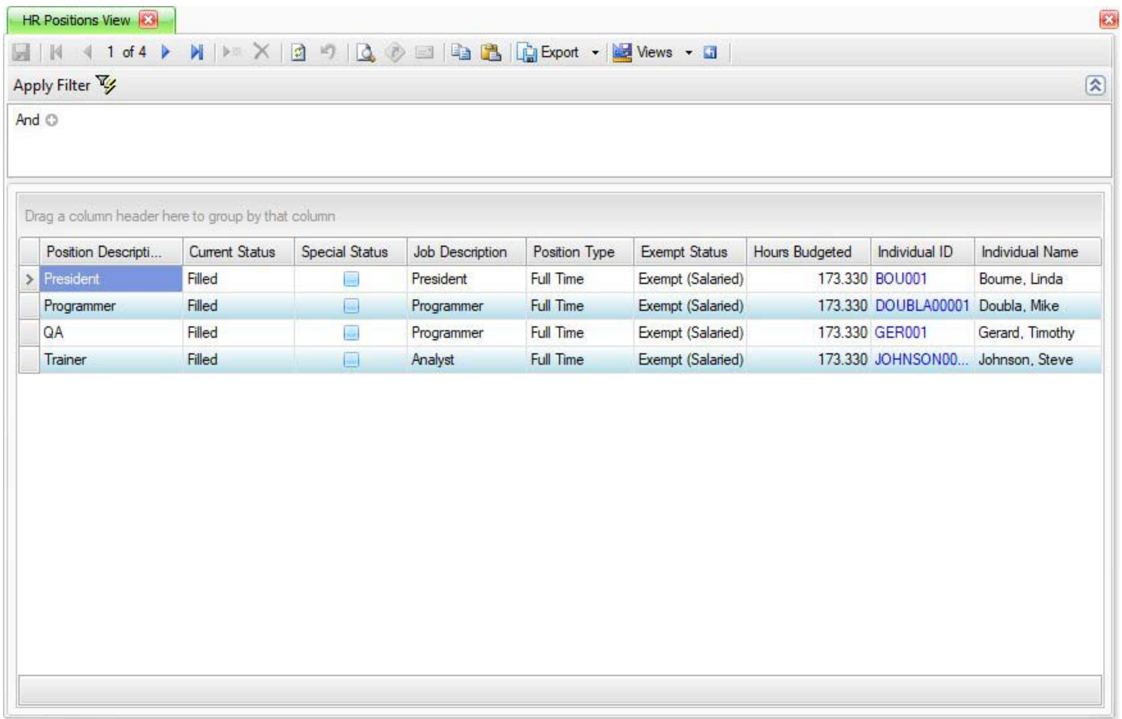
1. Select **Positions View** from the **Interactive Views** menu.

Positions View Menu



2. The **Positions View** screen appears.

Positions View Screen



3. Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.
4. Double click on the blue **Individual ID** field to drill down to the Individuals setup screen.
5. Refer to the **Using the Interactive Views Menu** section a the beginning of this chapter and the Interactive Views section in the General Information guide for more details on using the Positions View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

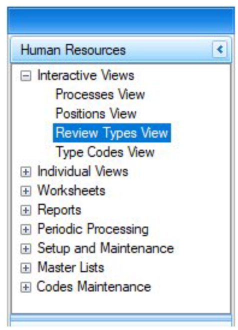
REVIEW TYPES VIEW

Use the **Review Types View** function to view information about the Review Types available in your company.

To use the **Review Types View**, follow these steps:

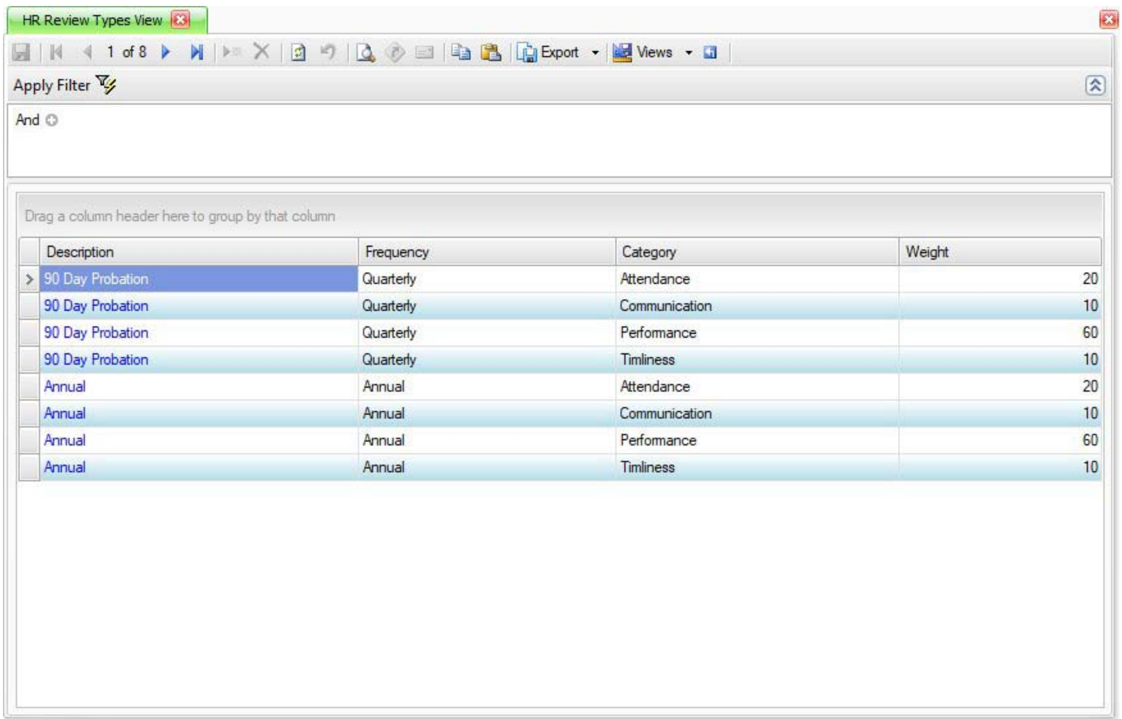
1. Select **Review Types View** from the **Interactive Views** menu.

Review Types View Menu



2. The **Review Types View** screen appears.

Review Types View Screen



3. Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.
4. Double click on the blue **Description** field to drill down to the Review Types setup screen.
5. Refer to the **Using the Interactive Views Menu** section a the beginning of this chapter and the Interactive Views section in the General Information guide for more details on using the Review Types View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

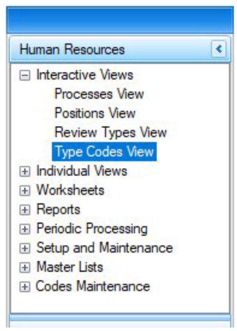
TYPE CODES VIEW

Use the **Type Codes View** function to view information about the Type Codes available in your company.

To use the **Type Codes View**, follow these steps:

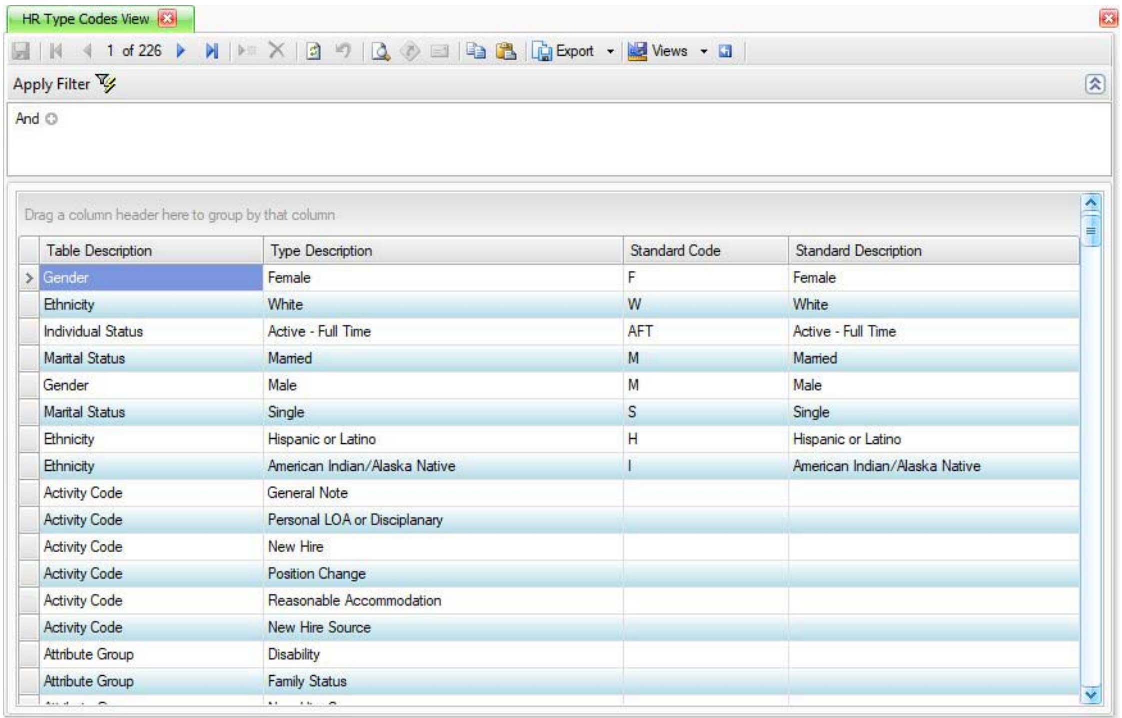
1. Select **Type Codes View** from the **Interactive Views** menu.

Type Codes View Menu



2. The **Type Codes View** screen appears.

Type Codes View Screen



3. Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.

4. Refer to the **Using the Interactive Views Menu** section a the beginning of this chapter and the Interactive Views section in the General Information guide for more details on using the Positions View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

5

INDIVIDUAL VIEWS

USING THE INDIVIDUAL VIEWS MENU

With the functions on the Individual Views menu, you can view but not change the following HR information:

- Individuals
- Processes Assignment
- Properties Assignment
- Positions Assignments
- Skills
- Tests, Certifications and Clearances
- Degrees
- Licenses Expiration
- Training
- Attributes
- Anniversaries
- Birthdays
- Dependents

Use these functions if you need to examine (but not change) an Individual record, an address, a process assignment, skills, degrees, license expirations, training.

Using Interactive Views you can easily and quickly build and manipulate tables to display information. After selecting from the available criteria to display as filter fields, data items, column fields, or row fields, you can highlight columns and rows to have the selected rows and columns display as a graph below the table. To include multiple rows or columns in the graph, you can use the CTRL+ click (to select multiple rows or columns) and SHIFT+ click (to select all rows or columns between the first and second click) shortcuts, after selecting the first row and column.

Sorting and Filtering

When you arrange the columns to your liking, you can sort, group, or filter the data by the column's contents. To sort and filter the data, right-click a column heading and use the functions outlined in the table below.

Button	Name	Select To
	**Sort Ascending**	Sort the selected column's data in ascending order. **NOTE: You can also accomplish this task by clicking the column heading until  appears.**
	**Sort Descending**	Sort the selected column's data in descending order. **NOTE: You can also accomplish this task by clicking the column heading until  appears.**
	Clear Sorting	Remove all sorting options and revert to the default view.
	**Group By This Column**	Group the identical entries from this column into a single group. **NOTE: If you group by column entry, you can right-click on the grouped column heading to select from the options outlined in this table, or choose Full Expand to expand all of the grouped entries, Full Collapse to collapse all of the grouped entries, or UnGroup to undo the grouped entry.**
	**Column Chooser**	Open the Customization window. With the Customization window open, you can click and drag columns to the window to remove them from the screen or click and drag columns from the window to place them back onto the screen. **NOTE: You can also remove a column from the form by clicking on the heading of the column and dragging it to the bottom of the screen and releasing it when your cursor changes to an *X*.**
	**Best Fit**	Adjust the selected column to resize the column for the best view of that column's data.
	**Clear Filter**	Remove all filter options and revert to the default view.

	**Filter Editor**	See "Filtering Across All Columns" in the General Information guide for more information.
	Best Fit (all columns)	Adjust all columns to resize for the best view all of the data at once.

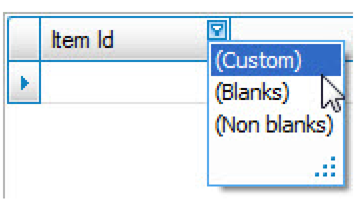
Filtering by an Individual Column

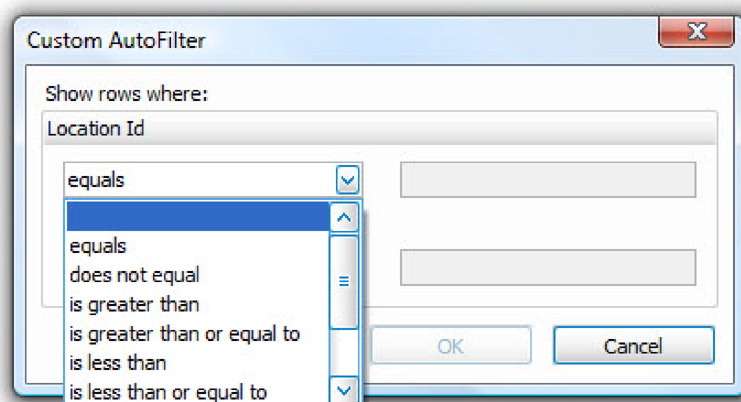
To create a filter for a single column, click the funnel icon that appears once you place the cursor in the associated column and then select a filter option from the dropdown menu.

Select	To
(Custom)	Enter criteria for filtering the selected column. **NOTE: View the following paragraph for additional information.**
(Blanks)	Display only entries with blank information in the selected column.
(Non blanks)	Display only entries with information in the selected column.

From the drop down menu, you can also select from the entries in the selected column to group the column by the selected entry.

If you select (**Custom**), the Custom AutoFilter function appears. Select up to two filtering criteria for the selected column from the drop down menus, then enter a string of text or numbers to complete the condition and click **OK**.





Sorting and Filtering Pivot Chart Data

Right-click on the pivot table gray area or a field button when in Pivot Chart View for each application, to use the following functions:

Select	To
Refresh Data	Refresh the data in the tables.
Hide	Remove the selected criterion from the table.
Order	Move the selected criterion to the beginning, left, right, or end of the list of criteria.
Show Field List	Open the PivotGrid Field List, then click and drag the applicable fields to the desired locations.
Hide Field List	Close the PivotGrid Field List.

NOTE: Note: See instructions in the "Filtering Across All Columns" in the General Information guide for more information on filtering.

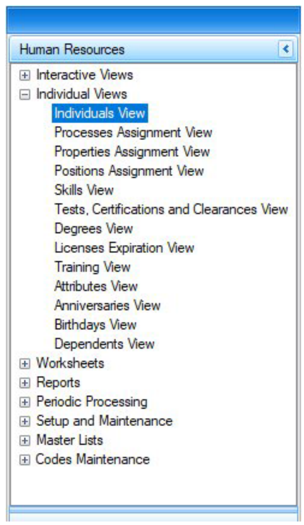
INDIVIDUALS VIEW

Use the **Individuals View** function to look up basic information about Individual employees. To see read-only detail information for the Individual, double-click on the Individual ID.

To use the **Individuals View**, follow these steps:

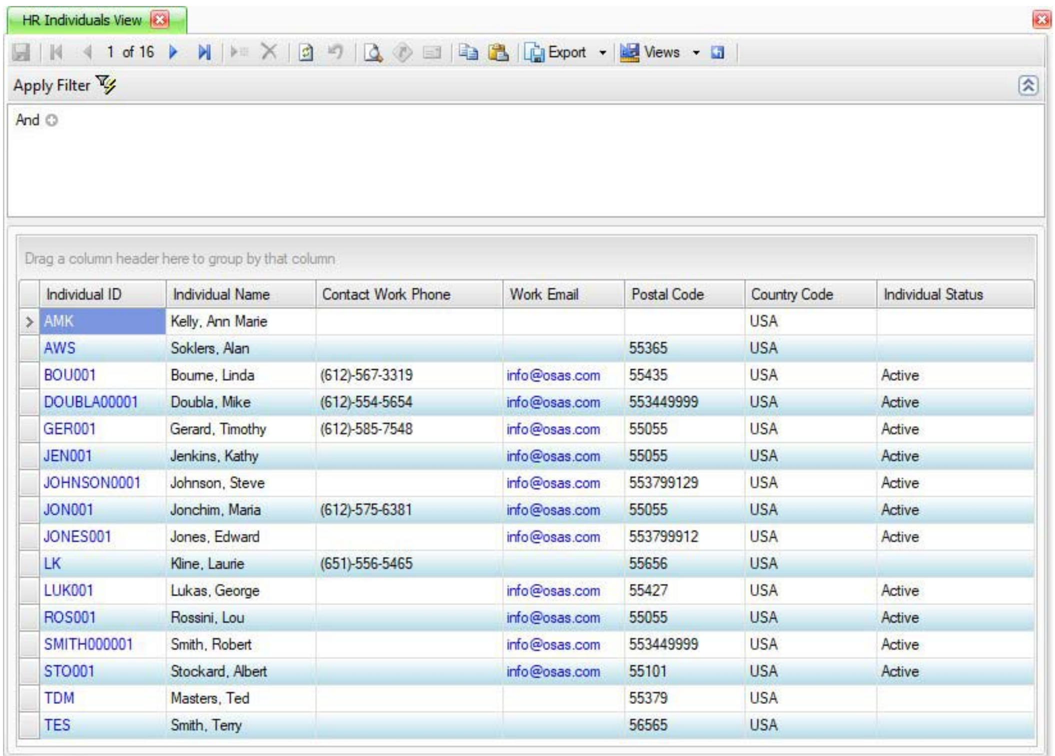
1. Select **Individuals View** from the **Individual Views** menu.

Individuals View Menu



2. The **Individuals View** screen appears.

Individuals View Screen



Individual ID	Individual Name	Contact Work Phone	Work Email	Postal Code	Country Code	Individual Status
AMK	Kelly, Ann Marie				USA	
AWS	Soklers, Alan			55365	USA	
BOU001	Bourne, Linda	(612)-567-3319	info@osas.com	55435	USA	Active
DOUBLA00001	Doubla, Mike	(612)-554-5654	info@osas.com	553449999	USA	Active
GER001	Gerard, Timothy	(612)-585-7548	info@osas.com	55055	USA	Active
JEN001	Jenkins, Kathy		info@osas.com	55055	USA	Active
JOHNSON0001	Johnson, Steve		info@osas.com	553799129	USA	Active
JON001	Jonchim, Maria	(612)-575-6381	info@osas.com	55055	USA	Active
JONES001	Jones, Edward		info@osas.com	553799912	USA	Active
LK	Kline, Laurie	(651)-556-5465		55656	USA	
LUK001	Lukas, George		info@osas.com	55427	USA	Active
ROS001	Rossini, Lou		info@osas.com	55055	USA	Active
SMITH000001	Smith, Robert		info@osas.com	553449999	USA	Active
STO001	Stockard, Albert		info@osas.com	55101	USA	Active
TDM	Masters, Ted			55379	USA	
TES	Smith, Terry			56565	USA	

3. Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.
4. Double click on the blue **Individual ID** field to drill down to the Individuals setup screen.
5. Double click on the blue **Work Email** field to start your default email software with the displayed email address in the To field.
6. Refer to the **Using the Individual Views Menu** section a the beginning of this chapter and the Interactive Views section in the General Information guide for more details on using the Individuals View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

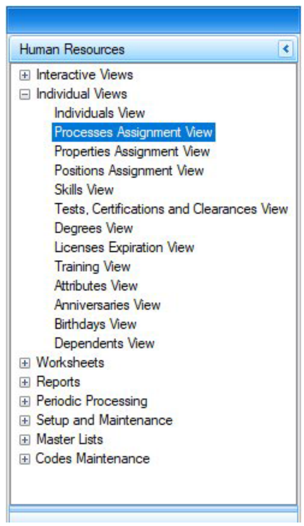
PROCESSES ASSIGNMENT VIEW

Use the **Processes Assignment View** function to look up information about Processes assigned to Individual employees.

To use the **Processes Assignment View**, follow these steps:

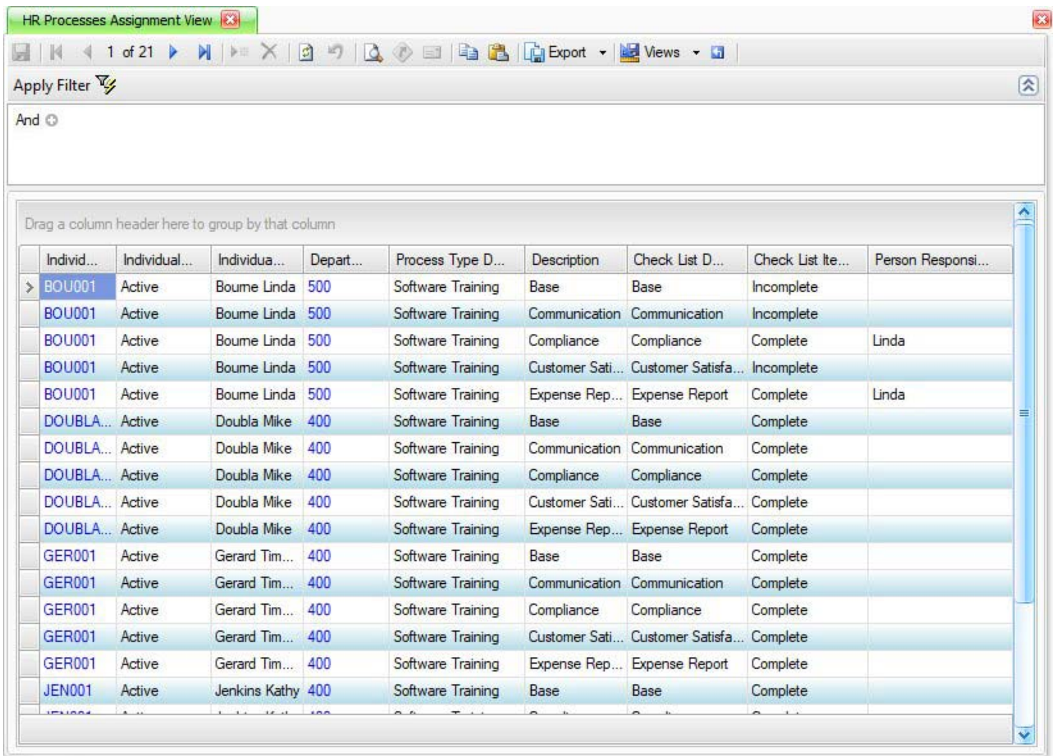
1. Select **Processes Assignment View** from the **Individual Views** menu.

Processes Assignment View Menu



2. The **Processes Assignment View** screen appears.

Processes Assignment View Screen



Individ...	Individual...	Individua...	Depart...	Process Type D...	Description	Check List D...	Check List Ite...	Person Responsi...
BOU001	Active	Bourne Linda	500	Software Training	Base	Base	Incomplete	
BOU001	Active	Bourne Linda	500	Software Training	Communication	Communication	Incomplete	
BOU001	Active	Bourne Linda	500	Software Training	Compliance	Compliance	Complete	Linda
BOU001	Active	Bourne Linda	500	Software Training	Customer Sati...	Customer Satisfa...	Incomplete	
BOU001	Active	Bourne Linda	500	Software Training	Expense Rep...	Expense Report	Complete	Linda
DOUBLA...	Active	Doubla Mike	400	Software Training	Base	Base	Complete	
DOUBLA...	Active	Doubla Mike	400	Software Training	Communication	Communication	Complete	
DOUBLA...	Active	Doubla Mike	400	Software Training	Compliance	Compliance	Complete	
DOUBLA...	Active	Doubla Mike	400	Software Training	Customer Sati...	Customer Satisfa...	Complete	
DOUBLA...	Active	Doubla Mike	400	Software Training	Expense Rep...	Expense Report	Complete	
GER001	Active	Gerard Tim...	400	Software Training	Base	Base	Complete	
GER001	Active	Gerard Tim...	400	Software Training	Communication	Communication	Complete	
GER001	Active	Gerard Tim...	400	Software Training	Compliance	Compliance	Complete	
GER001	Active	Gerard Tim...	400	Software Training	Customer Sati...	Customer Satisfa...	Complete	
GER001	Active	Gerard Tim...	400	Software Training	Expense Rep...	Expense Report	Complete	
JEN001	Active	Jenkins Kathy	400	Software Training	Base	Base	Complete	

3. Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.

4. Double click on the blue **Individual ID** field to drill down to the Individuals setup screen.

5. Double click on the blue **Department ID** field to drill down to the Departments setup screen.

6. Refer to the **Using the Individual Views Menu** section a the beginning of this chapter and the Interactive Views section in the General Information guide for more details on using the Processes Assignment View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

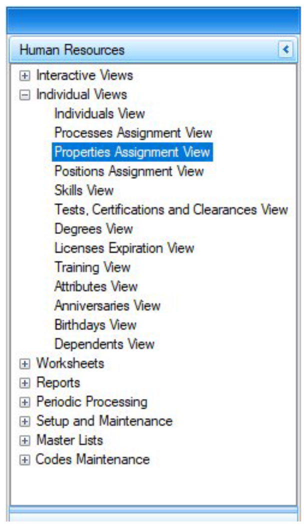
PROPERTIES ASSIGNMENT VIEW

Use the **Properties Assignment View** function to look up information about Property, such as computers or cell phones, assigned to Individual employees. To see read-only detail information for the Individual, double-click on the Individual ID.

To use the **Properties Assignment View**, follow these steps:

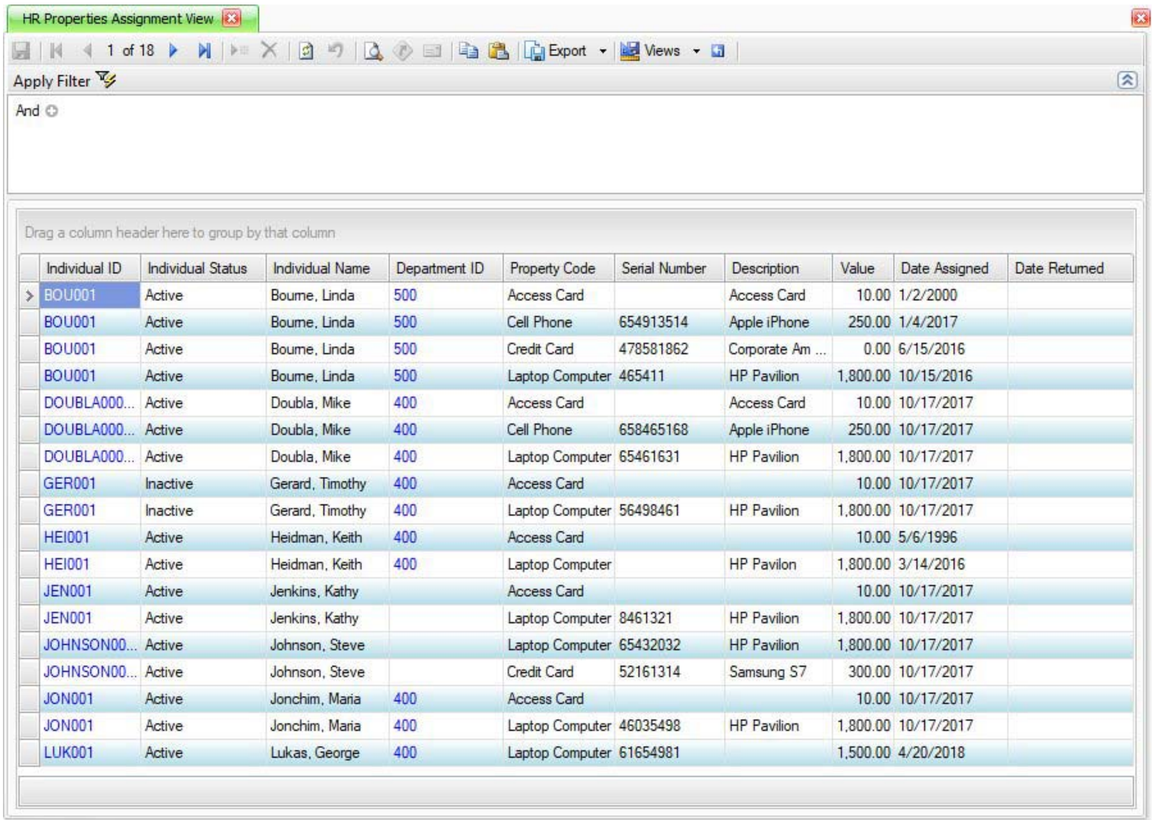
1. Select **Properties Assignment View** from the **Individual Views** menu.

Properties Assignment View Menu



2. The **Properties Assignment View** screen appears.

Properties Assignment View Screen



Individual ID	Individual Status	Individual Name	Department ID	Property Code	Serial Number	Description	Value	Date Assigned	Date Returned
BOU001	Active	Bourne, Linda	500	Access Card		Access Card	10.00	1/2/2000	
BOU001	Active	Bourne, Linda	500	Cell Phone	654913514	Apple iPhone	250.00	1/4/2017	
BOU001	Active	Bourne, Linda	500	Credit Card	478581862	Corporate Am ...	0.00	6/15/2016	
BOU001	Active	Bourne, Linda	500	Laptop Computer	465411	HP Pavilion	1,800.00	10/15/2016	
DOUBLA000...	Active	Doubla, Mike	400	Access Card		Access Card	10.00	10/17/2017	
DOUBLA000...	Active	Doubla, Mike	400	Cell Phone	658465168	Apple iPhone	250.00	10/17/2017	
DOUBLA000...	Active	Doubla, Mike	400	Laptop Computer	65461631	HP Pavilion	1,800.00	10/17/2017	
GER001	Inactive	Gerard, Timothy	400	Access Card			10.00	10/17/2017	
GER001	Inactive	Gerard, Timothy	400	Laptop Computer	56498461	HP Pavilion	1,800.00	10/17/2017	
HEI001	Active	Heidman, Keith	400	Access Card			10.00	5/6/1996	
HEI001	Active	Heidman, Keith	400	Laptop Computer		HP Pavilon	1,800.00	3/14/2016	
JEN001	Active	Jenkins, Kathy		Access Card			10.00	10/17/2017	
JEN001	Active	Jenkins, Kathy		Laptop Computer	8461321	HP Pavilion	1,800.00	10/17/2017	
JOHNSON00...	Active	Johnson, Steve		Laptop Computer	65432032	HP Pavilion	1,800.00	10/17/2017	
JOHNSON00...	Active	Johnson, Steve		Credit Card	52161314	Samsung S7	300.00	10/17/2017	
JON001	Active	Jonchim, Maria	400	Access Card			10.00	10/17/2017	
JON001	Active	Jonchim, Maria	400	Laptop Computer	46035498	HP Pavilion	1,800.00	10/17/2017	
LUK001	Active	Lukas, George	400	Laptop Computer	61654981		1,500.00	4/20/2018	

3. Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.

4. Double click on the blue **Individual ID** field to drill down to the Individuals setup screen.

5. Double click on the blue **Department ID** field to drill down to the Departments setup screen.

6. Refer to the **Using the Individual Views Menu** section a the beginning of this chapter and the Interactive Views section in the General Information guide for more details on using the Properties Assignment View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

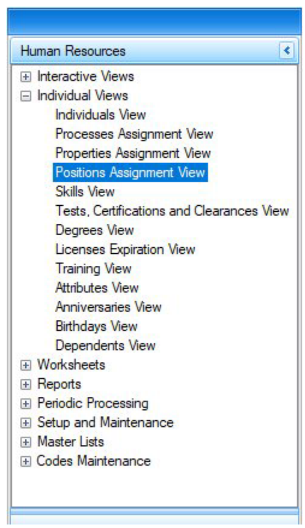
POSITIONS ASSIGNMENT VIEW

Use the **Positions Assignment View** function to look up information about Positions assigned to Individuals, including whether the Position is active or filled, and the Individuals assigned to that Position. Double-click on the Department or the Individual links to view read-only details for that selection.

To use the **Positions Assignment View**, follow these steps:

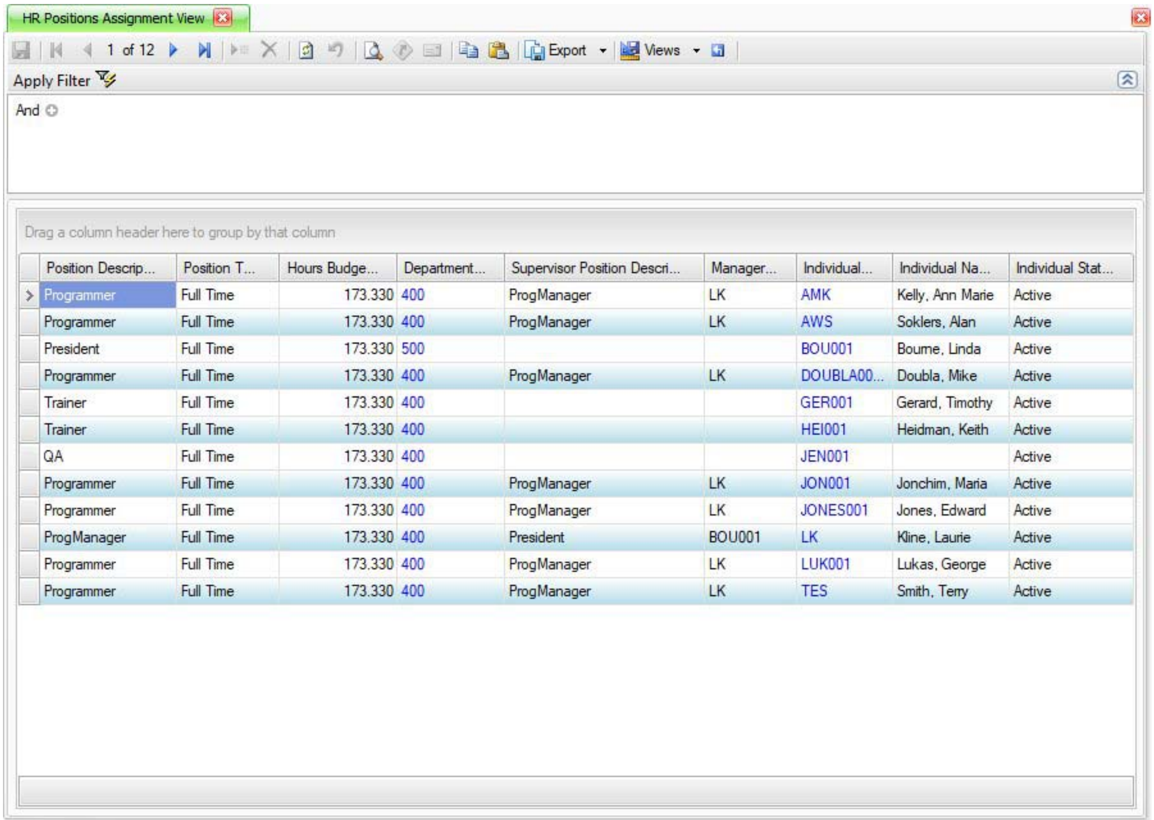
1. Select **Positions Assignment View** from the **Individual Views** menu.

Positions Assignment View Menu



2. The **Positions Assignment View** screen appears.

Positions Assignment View Screen



3. Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.
4. Double click on the blue **Individual ID** field to drill down to the Individuals setup screen.
5. Double click on the blue **Department ID** field to drill down to the Departments setup screen.
6. Refer to the **Using the Individual Views Menu** section a the beginning of this chapter and the Interactive Views section in the General Information guide for more details on using the Positions Assignment View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

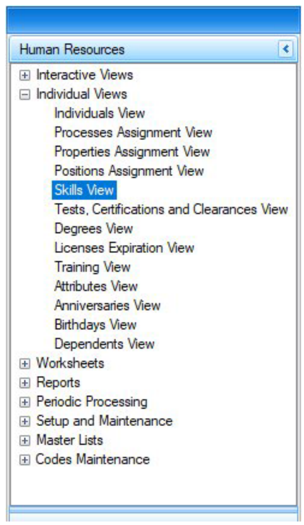
SKILLS VIEW

Use the **Skills View** function to look up information about Skills held by Individual employees. To see read-only detail information for the individual, double-click on the Individual ID.

To use the **Skills View**, follow these steps:

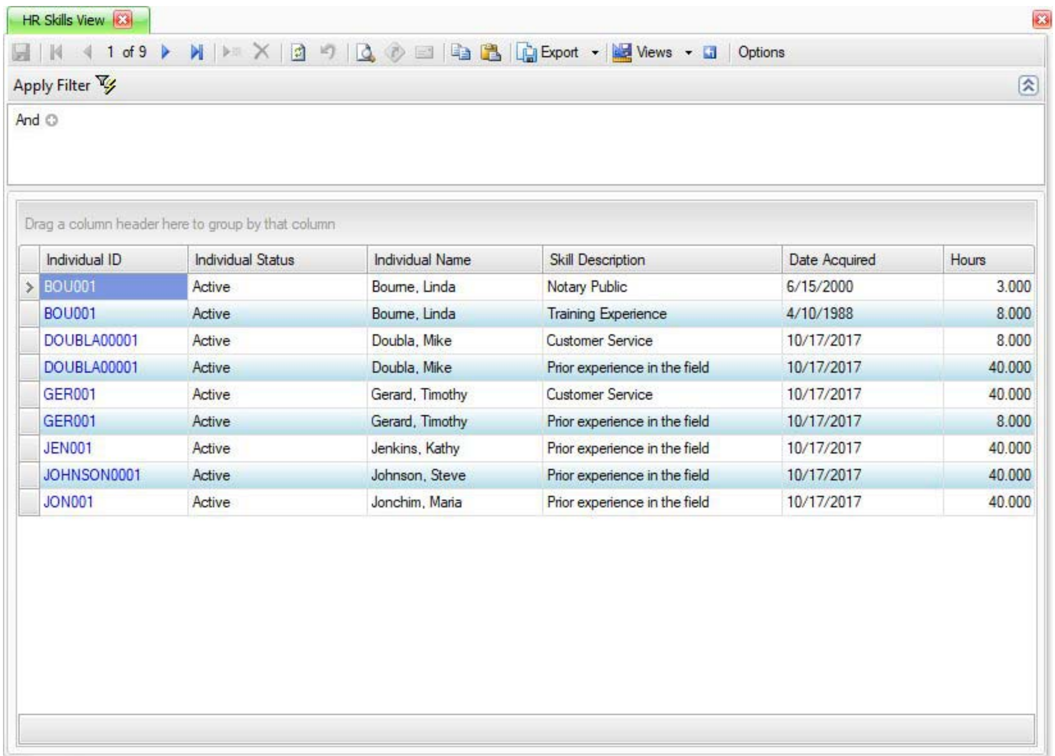
1. Select **Skills View** from the **Individual Views** menu.

Skills View Menu



2. The **Skills View** screen appears.

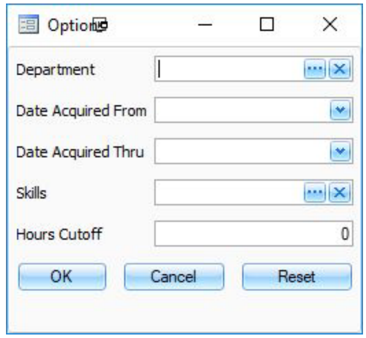
Skills View Screen



3. Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.
4. Double click on the blue **Individual ID** field to drill down to the Individuals setup screen.

5. Select the **Options** button to select options for the view.

Skills View Screen - Options



- Enter or select the **Department ID** to filter for the Skills. Select the "X" button to clear the field.
- Enter the **Date Acquired From** date as the first date acquired.
- Enter the **Date Acquired Thru** date as the last date acquired.
- Enter or select the **Skills** to display. Select the "X" button to clear the field.
- Enter the number of **Hours Cutoff** to display only Individuals' Skills with fewer than the entered hours.
- Select a command button:

Command Buttons

Name	Description
OK	Activate the information in the Options dialog box. Once the Options dialog box is closed, click the **Apply Filter** button to apply the information entered.
Cancel	Exit the Options dialog box without applying any selections.
Reset	Reset all values to the defaults.

6. Refer to the **Using the Individual Views Menu** section a the beginning of this chapter and the Interactive Views section in the General Information guide for more details on using the Skills View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

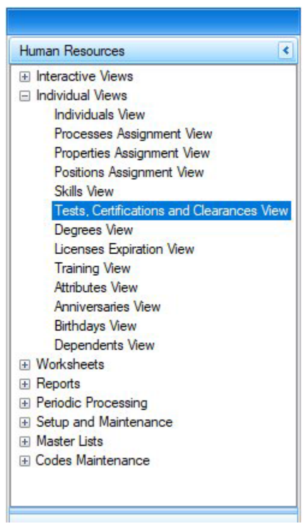
TESTS, CERTIFICATIONS AND CLEARANCES VIEW

Use the **Tests, Certifications, and Clearances View** function to look up information about Tests Individuals have taken, Certifications held by Individual employees, and Clearances held by Individuals. To see read-only detail information for the Individual, double-click on the Individual ID.

To use the **Tests, Certifications and Clearances View**, follow these steps:

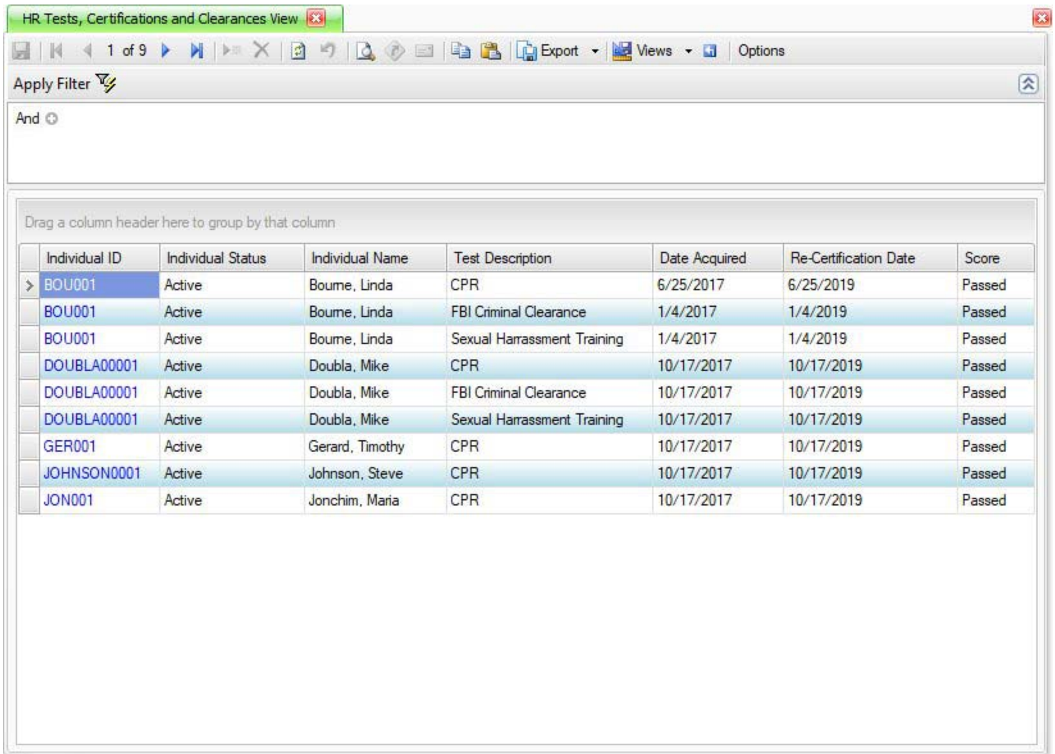
1. Select **Tests, Certifications and Clearances View** from the **Individual Views** menu.

Tests, Certifications and Clearances View Menu



2. The **Tests, Certifications and Clearances View** screen appears.

Tests, Certifications and Clearances View Screen

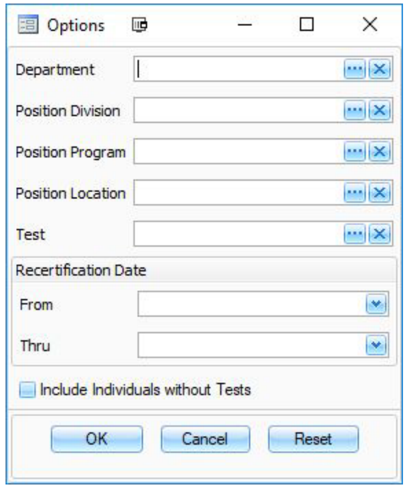


Individual ID	Individual Status	Individual Name	Test Description	Date Acquired	Re-Certification Date	Score
BOU001	Active	Bourne, Linda	CPR	6/25/2017	6/25/2019	Passed
BOU001	Active	Bourne, Linda	FBI Criminal Clearance	1/4/2017	1/4/2019	Passed
BOU001	Active	Bourne, Linda	Sexual Harrassment Training	1/4/2017	1/4/2019	Passed
DOUBLA00001	Active	Doubla, Mike	CPR	10/17/2017	10/17/2019	Passed
DOUBLA00001	Active	Doubla, Mike	FBI Criminal Clearance	10/17/2017	10/17/2019	Passed
DOUBLA00001	Active	Doubla, Mike	Sexual Harrassment Training	10/17/2017	10/17/2019	Passed
GER001	Active	Gerard, Timothy	CPR	10/17/2017	10/17/2019	Passed
JOHNSON0001	Active	Johnson, Steve	CPR	10/17/2017	10/17/2019	Passed
JON001	Active	Jonchim, Maria	CPR	10/17/2017	10/17/2019	Passed

3. Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.
4. Double click on the blue **Individual ID** field to drill down to the Individuals setup screen.

5. Select the **Options** button to select options for the view.

Tests, Certifications and Clearances View Screen - Options



- Enter or select the **Department ID** to filter for the Tests, Certifications and Clearances. Select the “X” button to clear the field.
- Enter or select the **Position Division** to filter for the Tests, Certifications and Clearances. Select the “X” button to clear the field.
- Enter or select the **Position Program** to filter for the Tests, Certifications and Clearances. Select the “X” button to clear the field.
- Enter or select the **Position Location** to filter for the Tests, Certifications and Clearances. Select the “X” button to clear the field.
- Enter or select the **Test** to filter for the Tests, Certifications and Clearances. Select the “X” button to clear the field.
- Enter or select the **Recertification Date From** and **Thru** to filter for the Tests, Certifications and Clearances.
- Select the **Include Individuals without tests** check box to include individuals in the view that do not have a test set up. Clear the check box to exclude individuals in the view that do not have a test set up.

- Select a command button:

Command Buttons

Name	Description
OK	Activate the information in the Options dialog box. Once the Options dialog box is closed, click the **Apply Filter** button to apply the information entered.
Cancel	Exit the Options dialog box without applying any selections.
Reset	Reset all values to the defaults.

6. Refer to the **Using the Individual Views Menu** section a the beginning of this chapter and the Interactive Views section in the General Information guide for more details on using the Tests, Certifications and Clearances View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

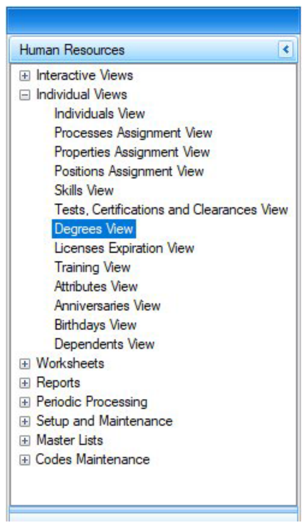
DEGREES VIEW

Use the **Degrees** View function to look up information about Degrees held by Individual employees. To see read-only detail information for the Individual, double-click on the Individual ID.

To use the **Degrees View**, follow these steps:

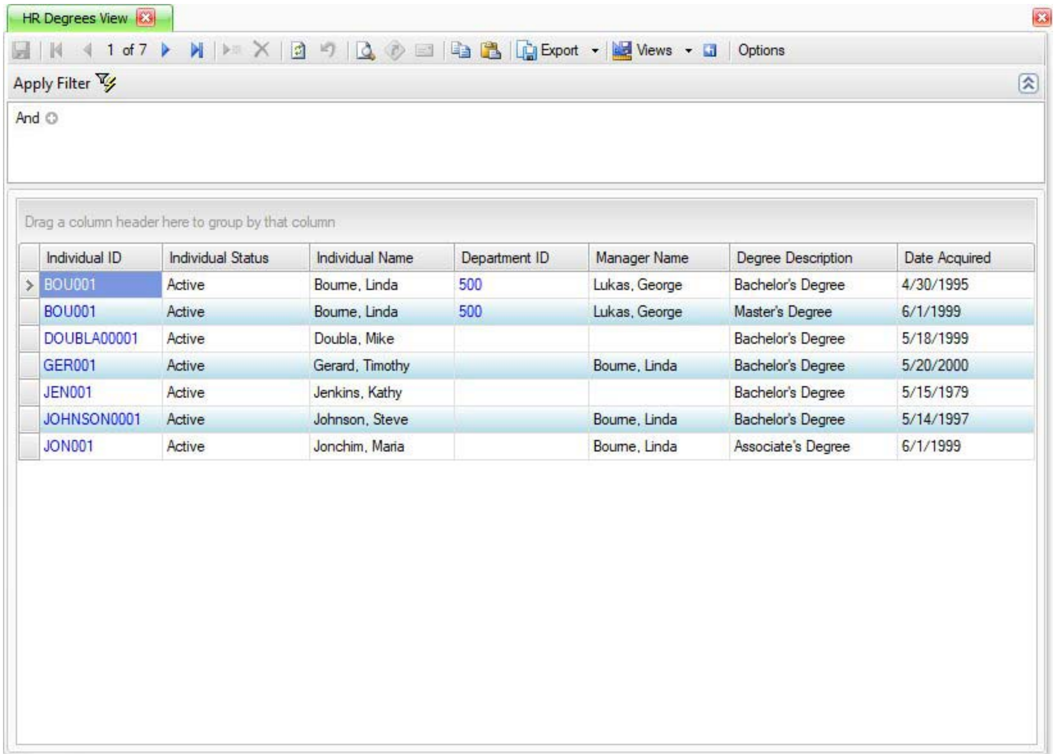
1. Select **Degrees View** from the **Individual Views** menu.

Degrees View Menu



2. The **Degrees View** screen appears.

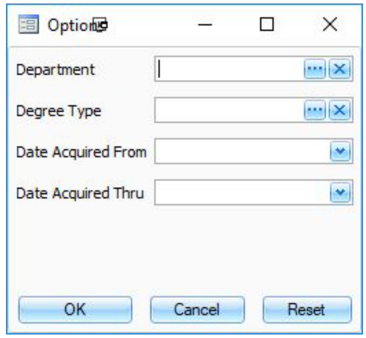
Degrees View Screen



3. Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.
4. Double click on the blue **Individual ID** field to drill down to the Individuals setup screen.
5. Double click on the blue **Department ID** field to drill down to the Departments setup screen.

6. Select the **Options** button to select options for the view.

Degrees View Screen - Options



- Enter or select the **Department ID** to filter for the Degrees. Select the “X” button to clear the field.
- Enter or select the **Degree Type** to filter for the Degrees. Select the “X” button to clear the field.
- Enter the **Date Acquired From** date as the first date acquired.
- Enter the **Date Acquired Thru** date as the last date acquired.
- Select a command button:

Command Buttons

Name	Description
OK	Activate the information in the Options dialog box. Once the Options dialog box is closed, click the **Apply Filter** button to apply the information entered.
Cancel	Exit the Options dialog box without applying any selections.
Reset	Reset all values to the defaults.

7. Refer to the **Using the Individual Views Menu** section a the beginning of this chapter and the Interactive Views section in the General Information guide for more details on using the Degrees View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

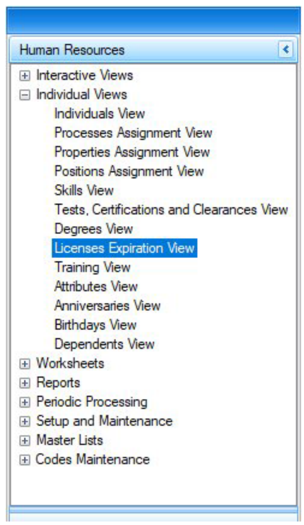
LICENSES EXPIRATION VIEW

Use the **Licenses Expiration View** function to look up information about Licenses held by Individuals to identify Licenses that are expired or are expiring. To see read-only detail information for the Individual, double-click on the Individual ID.

To use the **Licenses Expiration View**, follow these steps:

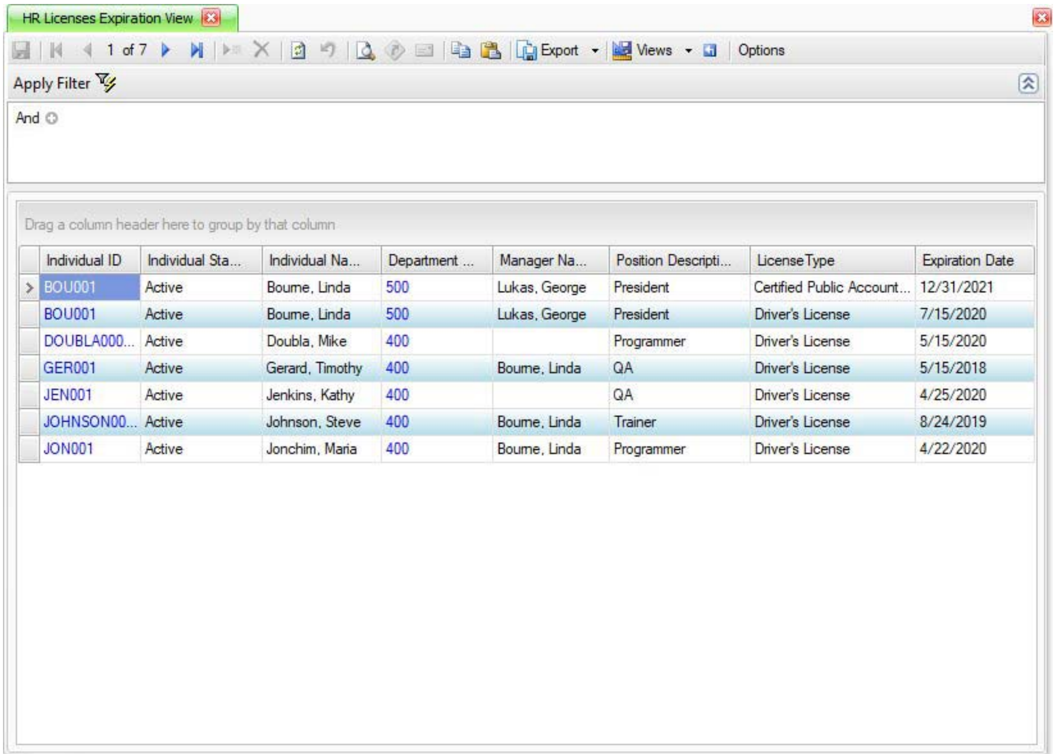
1. Select **Licenses Expiration View** from the **Individual Views** menu.

Licenses Expiration View Menu



2. The **Licenses Expiration View** screen appears.

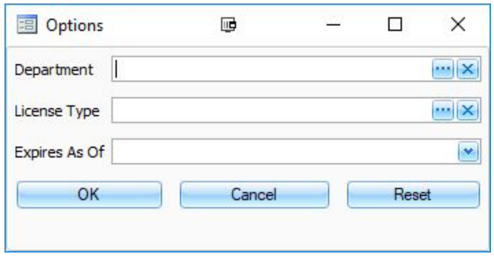
Licenses Expiration View Screen



3. Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.
4. Double click on the blue **Individual ID** field to drill down to the Individuals setup screen.
5. Double click on the blue **Department ID** field to drill down to the Departments setup screen.

6. Select the **Options** button to select options for the view.

Licenses Expiration View Screen - Options



- Enter or select the **Department ID** to filter for the Licenses Expiration. Select the “X” button to clear the field.
- Enter or select the **License Type** to filter for the Licenses Expiration. Select the “X” button to clear the field.
- Enter the **Expires As Of** date to display Licenses that expire as of the entered date.
- Select a command button:

Command Buttons

Name	Description
OK	Activate the information in the Options dialog box. Once the Options dialog box is closed, click the **Apply Filter** button to apply the information entered.
Cancel	Exit the Options dialog box without applying any selections.
Reset	Reset all values to the defaults.

7. Refer to the **Using the Individual Views Menu** section a the beginning of this chapter and the Interactive Views section in the General Information guide for more details on using the Licenses Expiration View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

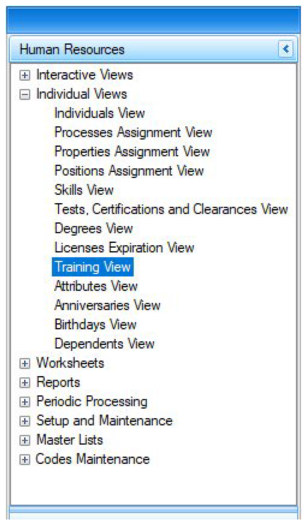
TRAINING VIEW

Use the **Training View** function to look up information about Training acquired by Individuals. To see read-only detail information for the Individual, double-click on the Individual ID.

To use the **Training View**, follow these steps:

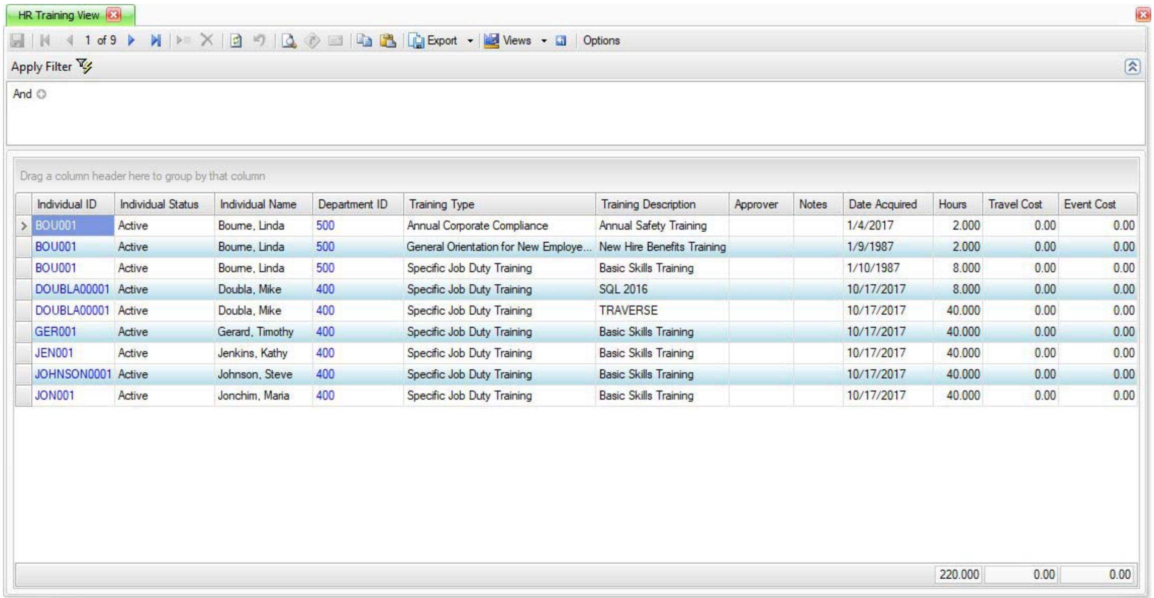
1. Select **Training View** from the **Individual Views** menu.

Training View Menu



2. The **Training View** screen appears.

Training View Screen

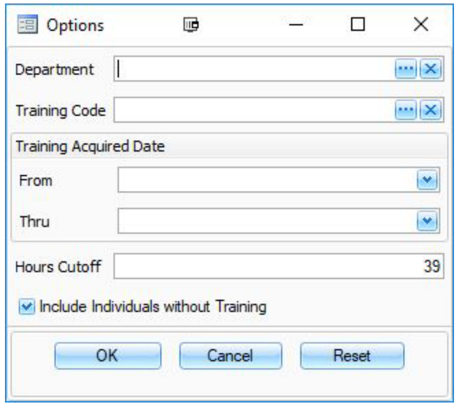


Individual ID	Individual Status	Individual Name	Department ID	Training Type	Training Description	Approver	Notes	Date Acquired	Hours	Travel Cost	Event Cost
BOU001	Active	Bourne, Linda	500	Annual Corporate Compliance	Annual Safety Training			1/4/2017	2.000	0.00	0.00
BOU001	Active	Bourne, Linda	500	General Orientation for New Employe...	New Hire Benefits Training			1/9/1987	2.000	0.00	0.00
BOU001	Active	Bourne, Linda	500	Specific Job Duty Training	Basic Skills Training			1/10/1987	8.000	0.00	0.00
DOUBLA00001	Active	Doubla, Mike	400	Specific Job Duty Training	SQL 2016			10/17/2017	8.000	0.00	0.00
DOUBLA00001	Active	Doubla, Mike	400	Specific Job Duty Training	TRAVERSE			10/17/2017	40.000	0.00	0.00
GER001	Active	Gerard, Timothy	400	Specific Job Duty Training	Basic Skills Training			10/17/2017	40.000	0.00	0.00
JEN001	Active	Jenkins, Kathy	400	Specific Job Duty Training	Basic Skills Training			10/17/2017	40.000	0.00	0.00
JOHNSON0001	Active	Johnson, Steve	400	Specific Job Duty Training	Basic Skills Training			10/17/2017	40.000	0.00	0.00
JON001	Active	Jonchim, Maria	400	Specific Job Duty Training	Basic Skills Training			10/17/2017	40.000	0.00	0.00
									220.000	0.00	0.00

3. Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.
4. Double click on the blue **Individual ID** field to drill down to the Individuals setup screen.
5. Double click on the blue **Department ID** field to drill down to the Departments setup screen.

6. Select the **Options** button to select options for the view.

Training View Screen - Options



- Enter or select the **Department ID** to filter for the Training. Select the “X” button to clear the field.
- Enter or select the **Training Code** to filter for the Training. Select the “X” button to clear the field.
- Enter or select the **Training Acquired Date From** and **Thru** to filter for the Training.
- Enter the number of **Hours Cutoff** to display only Individuals with fewer total Training hours than the entered hours.
- Select the **Include Individuals without Training** check box to include individuals in the view that do not have Training set up. Clear the check box to exclude individuals in the view that do not have Training set up.

- Select a command button:

Command Buttons

Name	Description
OK	Activate the information in the Options dialog box. Once the Options dialog box is closed, click the **Apply Filter** button to apply the information entered.
Cancel	Exit the Options dialog box without applying any selections.
Reset	Reset all values to the defaults.

7. Refer to the **Using the Individual Views Menu** section a the beginning of this chapter and the Interactive Views section in the General Information guide for more details on using the Training View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

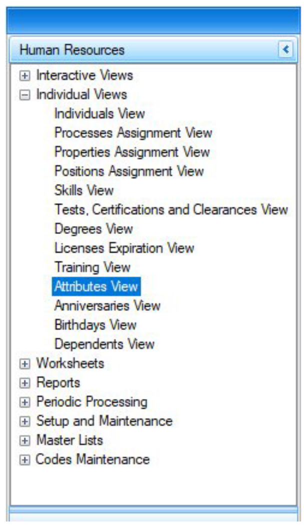
ATTRIBUTES VIEW

Use the **Attributes View** function to look up information about Attributes assigned to Individuals. Double-click on the Department or the Individual ID links to view read-only details for that selection.

To use the **Attributes View**, follow these steps:

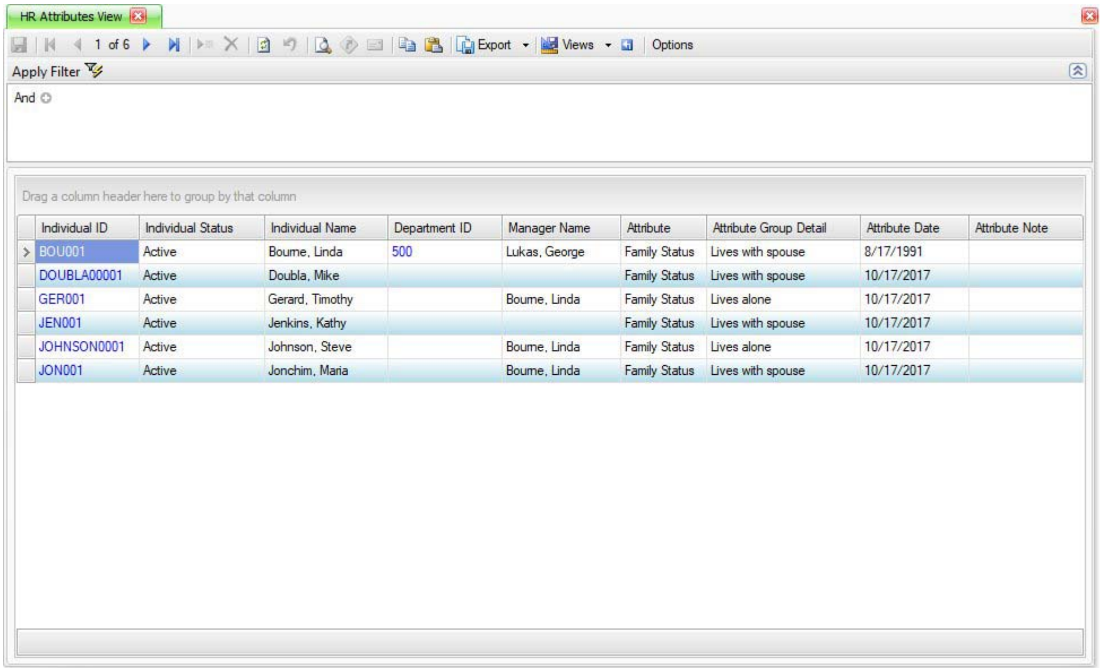
1. Select **Attributes View** from the **Individual Views** menu.

Attributes View Menu



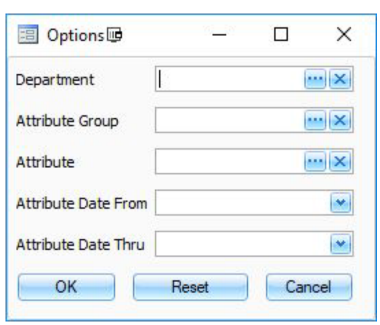
2. The **Attributes View** screen appears.

Attributes View Screen



3. Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.
4. Double click on the blue **Individual ID** field to drill down to the Individuals setup screen.
5. Double click on the blue **Department ID** field to drill down to the Departments setup screen.
6. Select the **Options** button to select options for the view.

Attributes View Screen - Options



- Enter or select the **Department ID** to filter for the Attributes. Select the “X” button to clear the field.
- Enter or select the **Attribute Code** to filter for the Attributes. Select the “X” button to clear the field.
- Enter or select the **Attribute** to filter for the Attributes. Select the “X” button to clear the field.
- Enter or select the **Attribute Date From** and **Thru** to filter for the Attributes.
- Select a command button:

Command Buttons

Name	Description
OK	Activate the information in the Options dialog box. Once the Options dialog box is closed, click the **Apply Filter** button to apply the information entered.
Cancel	Exit the Options dialog box without applying any selections.
Reset	Reset all values to the defaults.

7. Refer to the **Using the Individual Views Menu** section a the beginning of this chapter and the Interactive Views section in the General Information guide for more details on using the Attributes View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

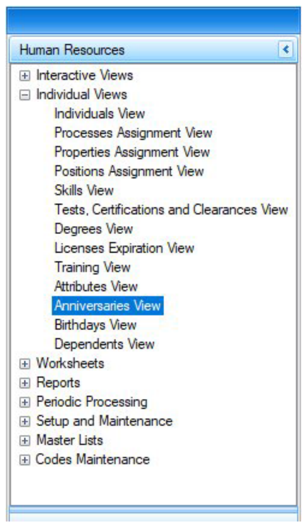
ANNIVERSARIES VIEW

Use the **Anniversaries View** function to look up the hire date and number of years of service for Individuals. Double-click on the Department or the Individual ID links to view read-only details for that selection.

To use the **Anniversaries View**, follow these steps:

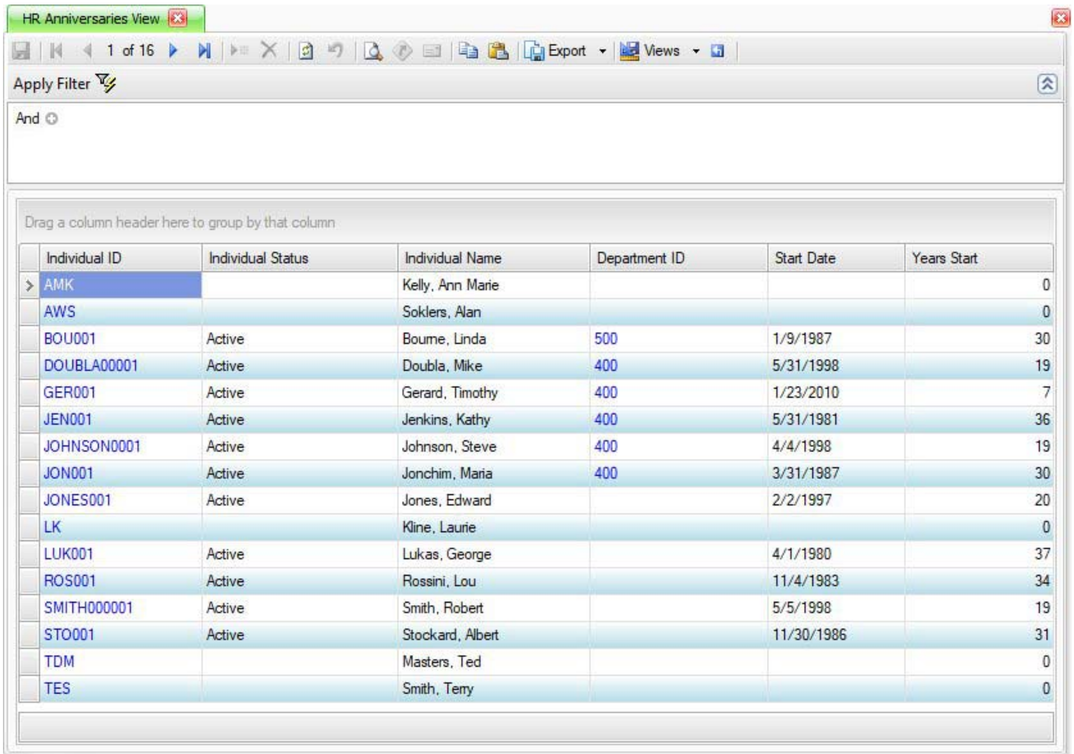
1. Select **Anniversaries View** from the **Individual Views** menu.

Anniversaries View Menu



2. The **Anniversaries View** screen appears.

Anniversaries View Screen



Individual ID	Individual Status	Individual Name	Department ID	Start Date	Years Start
AMK		Kelly, Ann Marie			0
AWS		Soklers, Alan			0
BOU001	Active	Bourne, Linda	500	1/9/1987	30
DOUBLA00001	Active	Doubla, Mike	400	5/31/1998	19
GER001	Active	Gerard, Timothy	400	1/23/2010	7
JEN001	Active	Jenkins, Kathy	400	5/31/1981	36
JOHNSON0001	Active	Johnson, Steve	400	4/4/1998	19
JON001	Active	Jonchim, Maria	400	3/31/1987	30
JONES001	Active	Jones, Edward		2/2/1997	20
LK		Kline, Laurie			0
LUK001	Active	Lukas, George		4/1/1980	37
ROS001	Active	Rossini, Lou		11/4/1983	34
SMITH000001	Active	Smith, Robert		5/5/1998	19
STO001	Active	Stockard, Albert		11/30/1986	31
TDM		Masters, Ted			0
TES		Smith, Terry			0

3. Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.

4. Double click on the blue **Individual ID** field to drill down to the Individuals setup screen.

5. Double click on the blue **Department ID** field to drill down to the Departments setup screen.

6. Refer to the **Using the Individual Views Menu** section a the beginning of this chapter and the Interactive Views section in the General Information guide for more details on using the Anniversaries View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

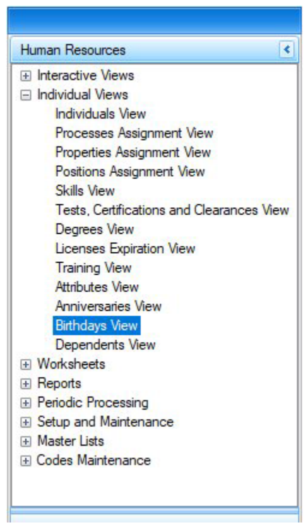
BIRTHDAYS VIEW

Use the **Birthdays View** function to look up the birthdate information for Individuals. Double-click on the Individual ID link to view read-only details for that person.

To use the **Birthdays View**, follow these steps:

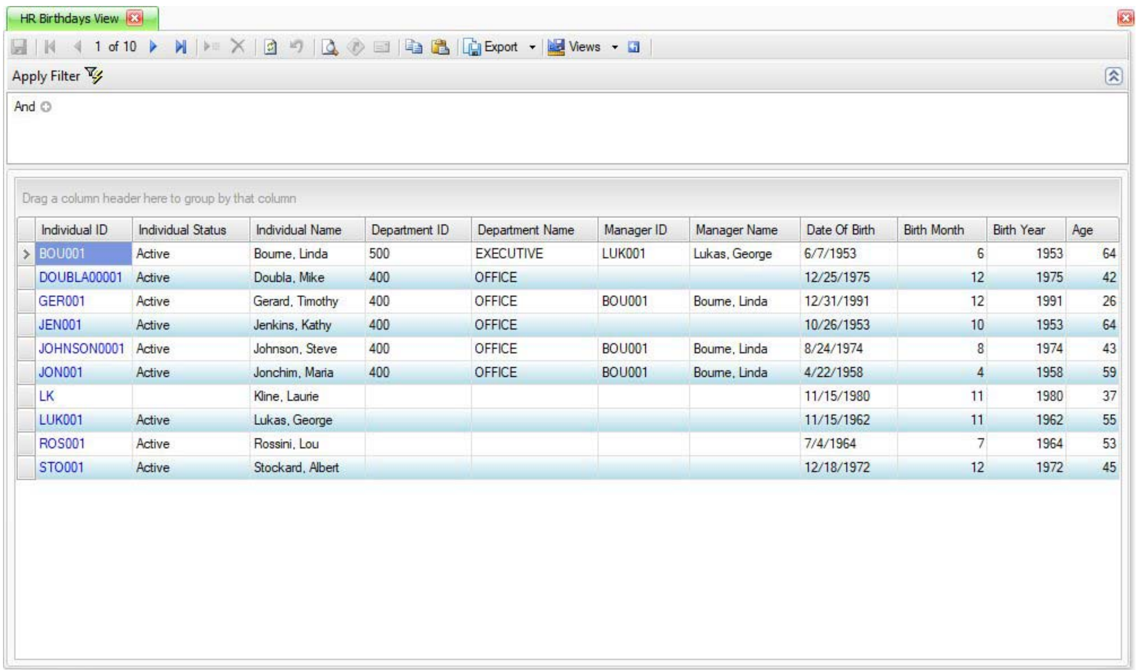
1. Select **Birthdays View** from the **Individual Views** menu.

Birthdays View Menu



2. The **Birthdays View** screen appears.

Birthdays View Screen



Individual ID	Individual Status	Individual Name	Department ID	Department Name	Manager ID	Manager Name	Date Of Birth	Birth Month	Birth Year	Age
BOU001	Active	Boume, Linda	500	EXECUTIVE	LUK001	Lukas, George	6/7/1953	6	1953	64
DOUBLA00001	Active	Doubla, Mike	400	OFFICE			12/25/1975	12	1975	42
GER001	Active	Gerard, Timothy	400	OFFICE	BOU001	Boume, Linda	12/31/1991	12	1991	26
JEN001	Active	Jenkins, Kathy	400	OFFICE			10/26/1953	10	1953	64
JOHNSON0001	Active	Johnson, Steve	400	OFFICE	BOU001	Boume, Linda	8/24/1974	8	1974	43
JON001	Active	Jonchim, Maria	400	OFFICE	BOU001	Boume, Linda	4/22/1958	4	1958	59
LK		Kline, Laurie					11/15/1980	11	1980	37
LUK001	Active	Lukas, George					11/15/1962	11	1962	55
ROS001	Active	Rossini, Lou					7/4/1964	7	1964	53
STO001	Active	Stockard, Albert					12/18/1972	12	1972	45

3. Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.

4. Double click on the blue **Individual ID** field to drill down to the Individuals setup screen.

5. Refer to the **Using the Individual Views Menu** section a the beginning of this chapter and the Interactive Views section in the General Information guide for more details on using the Birthdays View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

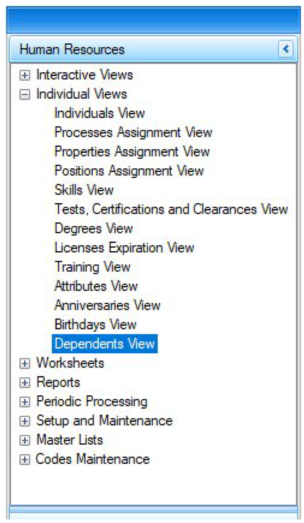
DEPENDENTS VIEW

Use the **Dependents View** function to look up dependent information for each Individual. To see read-only detail information for the Individual, double-click on the Individual ID.

To use the **Dependents View**, follow these steps:

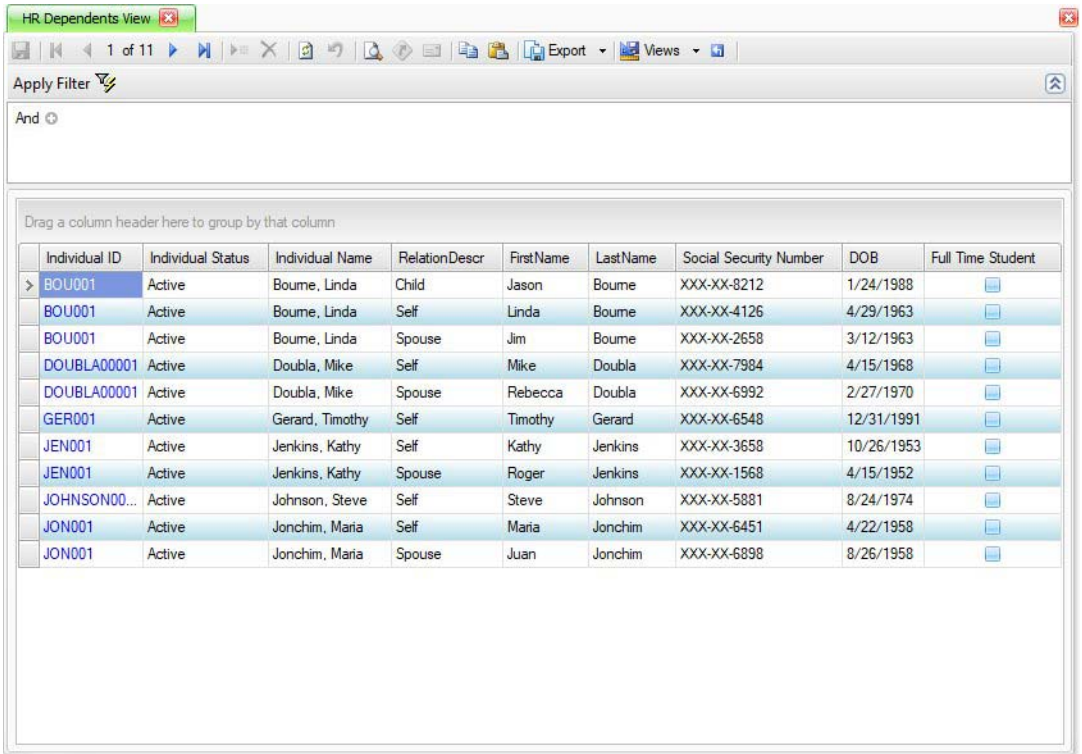
1. Select **Dependents View** from the **Individual Views** menu.

Dependents View Menu



2. The **Dependents View** screen appears.

Dependents View Screen



Individual ID	Individual Status	Individual Name	RelationDescr	FirstName	LastName	Social Security Number	DOB	Full Time Student
BOU001	Active	Bourne, Linda	Child	Jason	Bourne	XXX-XX-8212	1/24/1988	
BOU001	Active	Bourne, Linda	Self	Linda	Bourne	XXX-XX-4126	4/29/1963	
BOU001	Active	Bourne, Linda	Spouse	Jim	Bourne	XXX-XX-2658	3/12/1963	
DOUBLA00001	Active	Doubla, Mike	Self	Mike	Doubla	XXX-XX-7984	4/15/1968	
DOUBLA00001	Active	Doubla, Mike	Spouse	Rebecca	Doubla	XXX-XX-6992	2/27/1970	
GER001	Active	Gerard, Timothy	Self	Timothy	Gerard	XXX-XX-6548	12/31/1991	
JEN001	Active	Jenkins, Kathy	Self	Kathy	Jenkins	XXX-XX-3658	10/26/1953	
JEN001	Active	Jenkins, Kathy	Spouse	Roger	Jenkins	XXX-XX-1568	4/15/1952	
JOHNSON00...	Active	Johnson, Steve	Self	Steve	Johnson	XXX-XX-5881	8/24/1974	
JON001	Active	Jonchim, Maria	Self	Maria	Jonchim	XXX-XX-6451	4/22/1958	
JON001	Active	Jonchim, Maria	Spouse	Juan	Jonchim	XXX-XX-6898	8/26/1958	

3. Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.

4. Double click on the blue **Individual ID** field to drill down to the Individuals setup screen.

5. Refer to the **Using the Individual Views Menu** section a the beginning of this chapter and the Interactive Views section in the General Information guide for more details on using the Dependents View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

6

REPORTS AND WORKSHEETS

PRODUCING REPORTS

Use the Reports functions for the following tasks:

- The **Longevity Report** provides an analysis of length of service, categorizing Individuals by their department, job title, and job category.
- The **Salary Comparison by Position Report** provides salary and longevity information for the individuals specified.
- You can print review information on an individual or group of individuals by going to the **Individual Reviews Report** menu item under Reports.
- Use the **Attribute Census** Report to view the number of employees included within an attribute group.
- Use the **FMLA Report** to view employees requesting leave under the FMLA.
- The **Health Plan Enrollment Report** allows you to see the health care plan status of individuals.
- The **Life Insurance Enrollment Report** allows you to see the life insurance status of individuals.
- The **Retirement Plan Enrollment Report** allows you to see the retirement plan status of individuals.

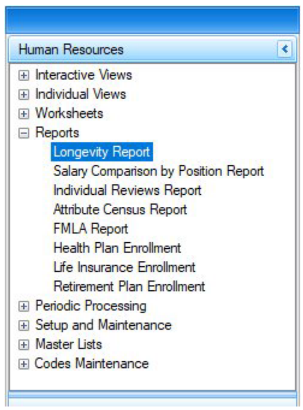
LONGEVITY REPORT

The **Longevity Report** provides an analysis of length of service, categorizing Individuals by their department, job title, and job category.

To produce the **Longevity Report**, follow these steps:

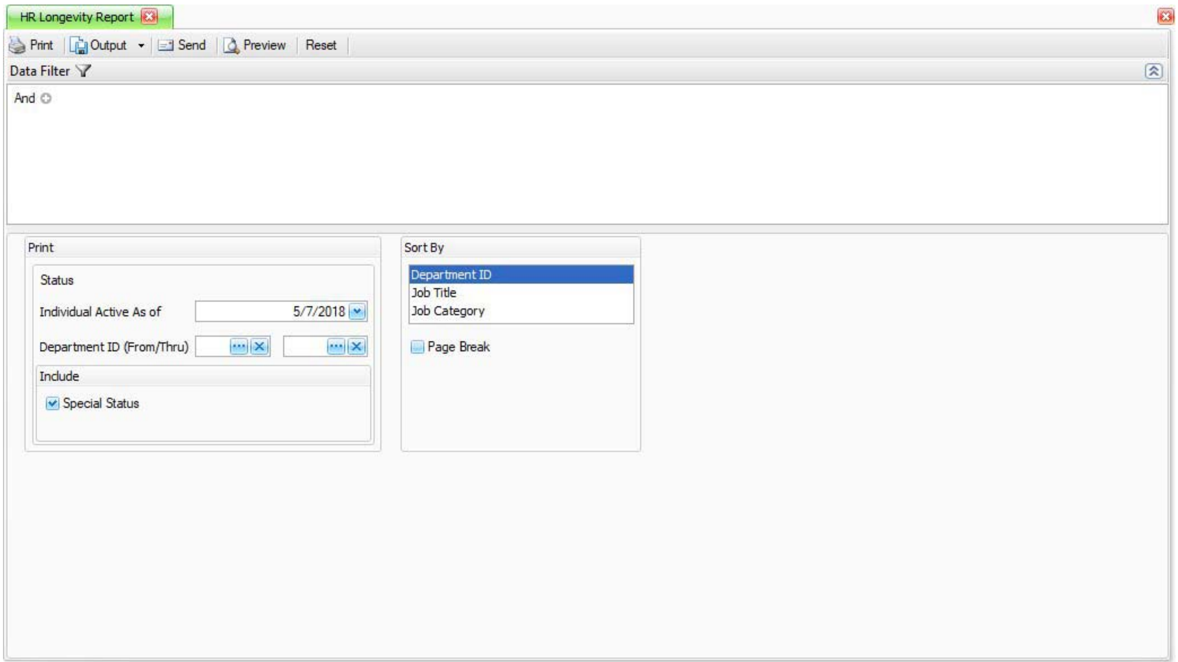
1. Select **Longevity Report** from the **Reports** menu.

Longevity Report Menu



2. The **Longevity Report** screen appears.

Longevity Report Screen



3. Select the range of **Filter Criteria** to include in the list or leave the fields blank to include all the Individual records.
4. In the **Individual Active As of** Date field, enter the date to find Individuals active as of that date (the default is the current date) to **Print** on the report.
5. Select a **Department ID From** and **Thru** to Print Individuals for a range of Departments, or leave the field blank to include all Departments. Select the “X” button to clear the field.
6. To include groups, such as disabled, that have a special status, mark the **Include Special Status** check box.
7. Select a field by which to sort the report in the **Sort By** section; **Department ID**, **Job Title**, or **Job Category**.
8. Mark the **Page Break** check box if you want the report to start a new page each time your selected sort option changes.

9. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Longevity Report

Continental Products Unlimited
Longevity Report
Sorted By Department ID

PAGE 1

Report Filter:

Individual Active As Of	10/18/2017	**Include Special Status**	Yes
Department ID		**Page Break**	No

Job Title	Job Category	Less than 6 Months	6 Months To 1 Year	1 to 5 Years	Above 5 Years	Total	Avg.Length Of Service
Department:	**400 - OFFICE**						
Analyst	2- Professionals	0	0	0	1	1	19.50
Programmer	2- Professionals	0	0	0	4	4	23.54
	Total:	0	0	0	5	5	21.52
Department:	**500 - EXECUTIVE**						
President	1- Officials - Managers	0	0	0	1	1	30.75
	Total:	0	0	0	1	1	30.75
	Grand Total:	0	0	0	6	6	24.60

*** End of Report ***

10/18/2017 1:40 PM   Kent.Heitkamp

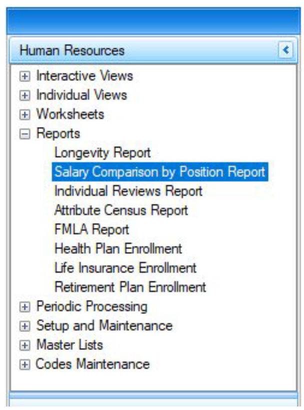
SALARY COMPARISON BY POSITION REPORT

The **Salary Comparison by Position Report** provides salary and longevity information for the Individuals specified.

To produce the **Salary Comparison by Position Report**, follow these steps:

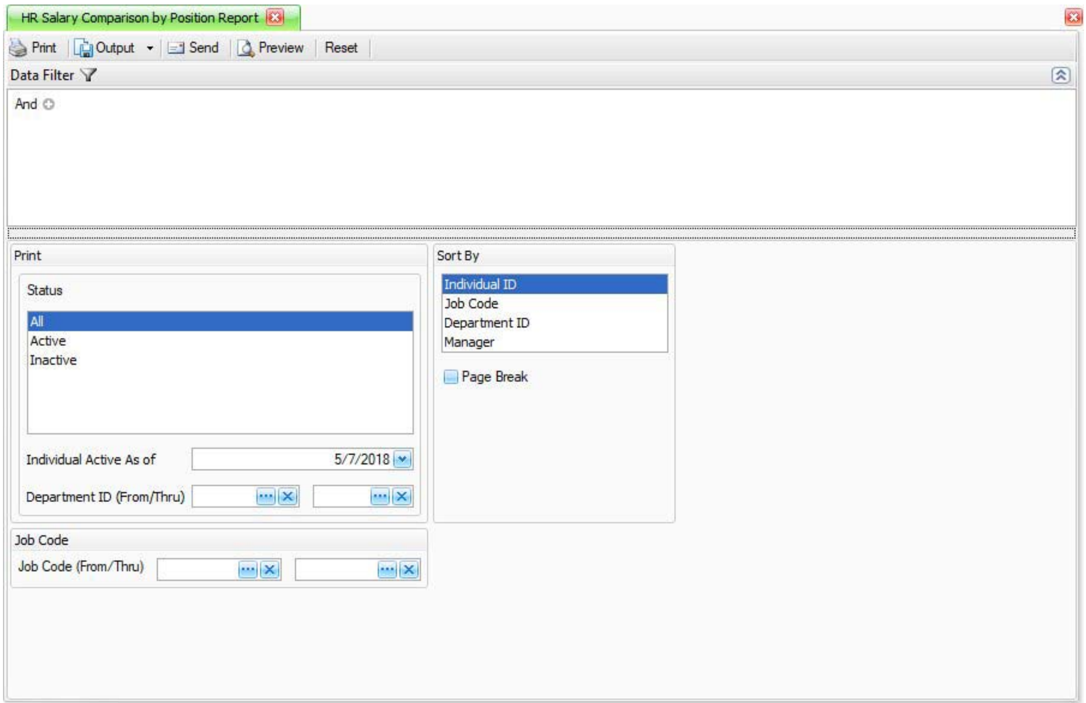
1. Select **Salary Comparison by Position Report** from the **Reports** menu.

Salary Comparison by Position Report Menu



2. The **Salary Comparison by Position Report** screen appears.

Salary Comparison by Position Report Screen



3. Select the range of **Filter Criteria** to include in the list or leave the fields blank to include all the Individual records.
4. Select the **Status** you want to **Print** on the report; **All**, **Active**, or **Inactive**.
5. In the **Individual Active As of** Date field, enter the date to find Individuals active as of that date (the default is the current date) to **Print** on the report.
6. Select a **Department ID From** and **Thru** to **Print** individuals in for a range of Departments, or leave the field blank to include all Departments. Select the “X” button to clear the field.
7. Select a **Job Code From** and **Thru** to print individuals assigned to range of jobs, or leave the field blank to include all Job Codes. Select the “X” button to clear the field.
8. Select a field by which to sort the report in the **Sort By** section; **Individual ID**, **Job Code**, **Department ID**, or **Manager**.
9. Mark the **Page Break** check box if you want the report to start a new page each time your selected Sort By option changes.

10. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Salary Comparison by Position Report

Continental Products Unlimited
Salary Comparison By Position Report
Sorted By Individual ID

PAGE 1

Report Filter

Position Status	All Individuals	Individual Active As Of	10/18/2017
Department ID		Job Code	

Individual ID	Name	Job Code	Department	Manager	Status	Years In Position
BOU001	Bourne, Linda	President	500	LUK001	AFT	17.08

Salary Information

Pay Type	Salary	Hourly Rate	Exempt
Salaried	7,500.00	0.00	☐
Salaried	8,500.00	0.00	☐
Salaried	10,500.00	0.00	☐

Individual ID	Name	Job Code	Department	Manager	Status	Years In Position
DOUBLA00001	Doubla, Mike	Programmer	400		AFT	0.00

Salary Information

Pay Type	Salary	Hourly Rate	Exempt
Salaried	4,100.00	0.00	☐

Individual ID	Name	Job Code	Department	Manager	Status	Years In Position
GER001	Gerard, Timothy	Programmer	400	BOU001	AFT	0.00

Salary Information

Pay Type	Salary	Hourly Rate	Exempt
Salaried	5,550.00	0.00	☐

Individual ID	Name	Job Code	Department	Manager	Status	Years In Position
JEN001	Jenkins, Kathy	Programmer	400		AFT	0.00

Salary Information

Pay Type	Salary	Hourly Rate	Exempt
Salaried	7,500.00	0.00	☐

Individual ID	Name	Job Code	Department	Manager	Status	Years In Position
JOHNSON0001	Johnson, Steve	Analyst	400	BOU001	AFT	0.00

Salary Information

Pay Type	Salary	Hourly Rate	Exempt
Salaried	1,575.00	0.00	☐

Individual ID	Name	Job Code	Department	Manager	Status	Years In Position
JON001	Jonchim, Maria	Programmer	400	BOU001	AFT	0.00

Salary Information

Pay Type	Salary	Hourly Rate	Exempt

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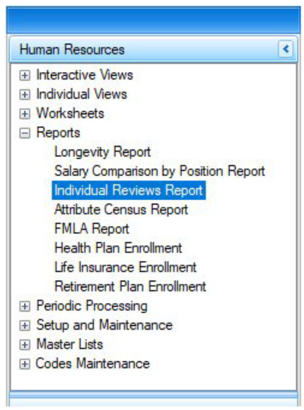
INDIVIDUAL REVIEWS REPORT

You can print review information on an individual or group of Individuals by going to the **Individual Reviews Report** menu item under Reports.

To produce the **Individual Reviews Report**, follow these steps:

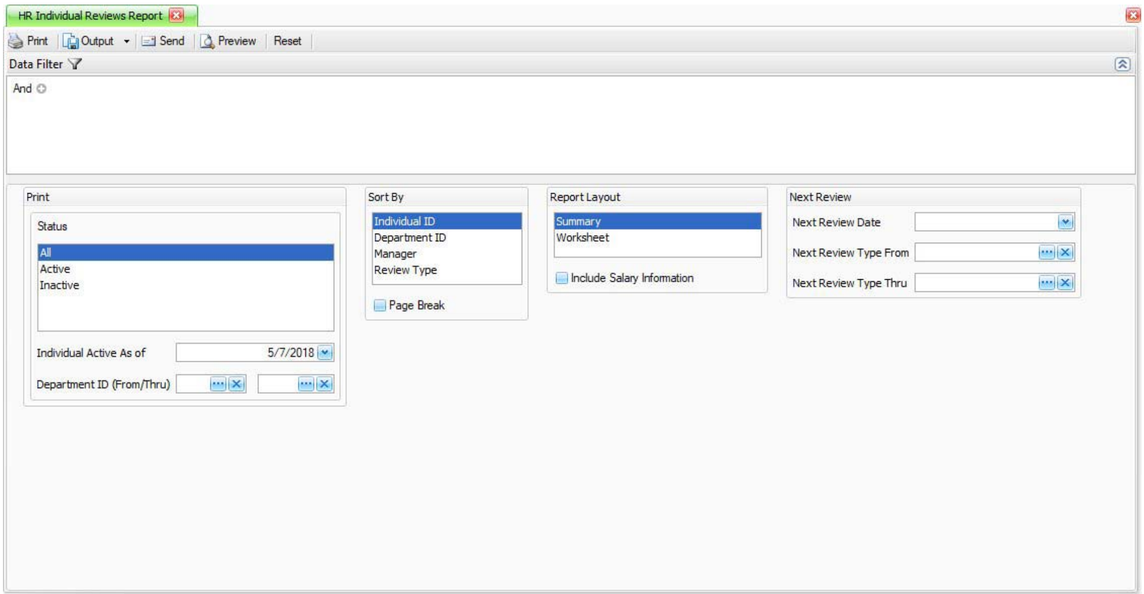
1. Select **Individual Reviews Report** from the **Reports** menu.

Individual Reviews Report Menu



2. The **Individual Reviews Report** screen appears.

Individual Reviews Report Screen



3. Select the range of **Filter Criteria** to include in the list or leave the fields blank to include all the Individual records.
4. Select the **Status** you want to **Print** on the report; **All**, **Active**, or **Inactive**.
5. In the **Individual Active As of** Date field, enter the date to find Individuals active as of that date (the default is the current date) to **Print** on the report.
6. Select a **Department ID From** and **Thru** to **Print** individuals for a range of Departments, or leave the field blank to include all Departments. Select the "X" button to clear the field.
7. Select a field by which to sort the report in the **Sort By** section; **Individual ID**, **Department ID**, **Manager**, or **Review Type**.
8. Mark the **Page Break** check box if you want the report to start a new page each time your selected Sort By option changes.
9. Select the **Report Layout** to print the report in **Summary** or **Worksheet** (detail) format.
   - The **Summary** report prints Name, Manager, Department, Job Title, Last and Next Review Dates, Review Type, and, if specified, Salary.
   - The **Worksheet** option lists Review Categories and their Weights, with room available to Rate and Comment on the Individual.

10. Mark the **Print Salary Information** check box if you want to show salary information on the report.
11. Select a **Next Review Date**, if applicable. This will be used as a cutoff date for the report.
12. If applicable, select a **Next Review Type From** and **Thru**. This will filter the report to show only the range of Review Types matching the criteria. Select the “X” button to clear the field.
13. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Individual Reviews Report

Continental Products Unlimited
Individual Reviews Report
Sorted By Individual ID

PAGE 1

Report Filter
Print Active/Inactive   Individual Active As Of 10/18/2017
Next Review Date   Next Review Type
Department ID

Individual ID	Name / Manager	Department / Job Title	Review Date / Next Review Date	Category / Review Type	Weight
Individual:	**BOU001**	**Bourne, Linda K**			
BOU001	Bourne, Linda K	EXECUTIVE	1/4/2017	Attendance	20
	Lukas, George W	President	1/4/2018	Annual	
BOU001	Bourne, Linda K	EXECUTIVE	1/4/2017	Communication	10
	Lukas, George W	President	1/4/2018	Annual	
BOU001	Bourne, Linda K	EXECUTIVE	1/4/2017	Performance	60
	Lukas, George W	President	1/4/2018	Annual	
BOU001	Bourne, Linda K	EXECUTIVE	1/4/2017	Timliness	10
	Lukas, George W	President	1/4/2018	Annual	
Individual:	**DOUBLA00001**	**Doubla, Mike K**			
DOUBLA00001	Doubla, Mike K	OFFICE	10/18/2017	Attendance	20
		Programmer	1/18/2018	90 Day Probation	
DOUBLA00001	Doubla, Mike K	OFFICE	10/18/2017	Communication	10
		Programmer	1/18/2018	90 Day Probation	
DOUBLA00001	Doubla, Mike K	OFFICE	10/18/2017	Performance	60
		Programmer	1/18/2018	90 Day Probation	
DOUBLA00001	Doubla, Mike K	OFFICE	10/18/2017	Timliness	10
		Programmer	1/18/2018	90 Day Probation	
Individual:	**GER001**	**Gerard, Timothy K**			
GER001	Gerard, Timothy K	OFFICE	10/18/2017	Attendance	20
	Bourne, Linda K	Programmer	10/18/2018	Annual	
GER001	Gerard, Timothy K	OFFICE	10/18/2017	Communication	10
	Bourne, Linda K	Programmer	10/18/2018	Annual	
GER001	Gerard, Timothy K	OFFICE	10/18/2017	Performance	60
	Bourne, Linda K	Programmer	10/18/2018	Annual	
GER001	Gerard, Timothy K	OFFICE	10/18/2017	Timliness	10
	Bourne, Linda K	Programmer	10/18/2018	Annual	
Individual:	**JEN001**	**Jenkins, Kathy C**			
JEN001	Jenkins, Kathy C	OFFICE	10/18/2017	Attendance	20
		Programmer	10/18/2018	Annual	
JEN001	Jenkins, Kathy C	OFFICE	10/18/2017	Communication	10
		Programmer	10/18/2018	Annual	
JEN001	Jenkins, Kathy C	OFFICE	10/18/2017	Performance	60
		Programmer	10/18/2018	Annual	
JEN001	Jenkins, Kathy C	OFFICE	10/18/2017	Timliness	10
		Programmer	10/18/2018	Annual	
Individual:	**JOHNSON0001**	**Johnson, Steve W**			
JOHNSON0001	Johnson, Steve W	OFFICE	10/18/2017	Attendance	20
	Bourne, Linda K	Analyst	10/18/2018	Annual	
JOHNSON0001	Johnson, Steve W	OFFICE	10/18/2017	Communication	10
	Bourne, Linda K	Analyst	10/18/2018	Annual	

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Individual Reviews Worksheet

Continental Products Unlimited
Individual Reviews Report
Sorted By Individual ID

PAGE 1

View	Active/Inactive	Individual Active As Of	10/18/2017
Next Review Date		Next Review Type	
Department ID			

Individual ID	Name / Manager	Department / Job Title	Review Date / Next Review Date	Review Type / Salary
BOU001	Bourne, Linda K	EXECUTIVE	1/4/2017	Annual
	Lukas, George W	President	1/4/2018	10,500.00

Category	Weight	Rating	Notes
Attendance	20	80.00	
Communication	10	70.00	
Performance	60	90.00	
Timliness	10	90.00	

Notes

Individual ID	Name / Manager	Department / Job Title	Review Date / Next Review Date	Review Type / Salary
DOUBLA00001	Doubla, Mike K	OFFICE	10/18/2017	90 Day Probation
		Programmer	1/18/2018	4,100.00

Category	Weight	Rating	Notes
Attendance	20	50.00	
Communication	10	80.00	
Performance	60	80.00	
Timliness	10	80.00	

Notes

Individual ID	Name / Manager	Department / Job Title	Review Date / Next Review Date	Review Type / Salary
GER001	Gerard, Timothy K	OFFICE	10/18/2017	Annual
	Bourne, Linda K	Programmer	10/18/2018	5,550.00

Category	Weight	Rating	Notes
Attendance	20	10.00	
Communication	10	90.00	
Performance	60	50.00	
Timliness	10	80.00	

Notes

Individual ID	Name / Manager	Department / Job Title	Review Date / Next Review Date	Review Type / Salary
JEN001	Jenkins, Kathy C	OFFICE	10/18/2017	Annual
		Programmer	10/18/2018	7,500.00

Category	Weight	Rating	Notes

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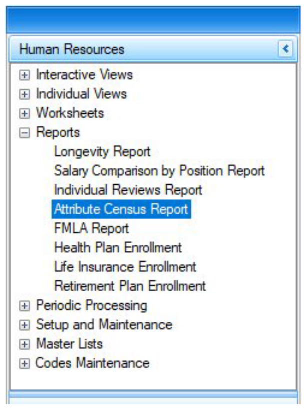
ATTRIBUTE CENSUS REPORT

Use the **Attribute Census Report** to view the number of Employees included within an Attribute Group.

To produce the **Attribute Census Report**, follow these steps:

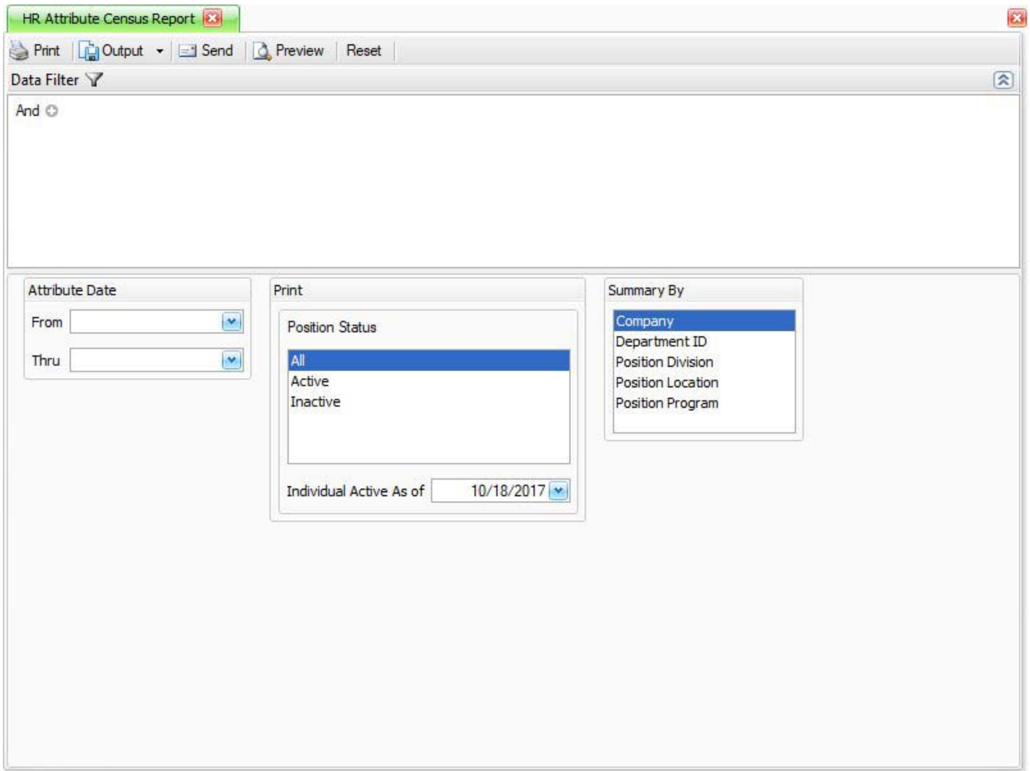
1. Select **Attribute Census Report** from the **Reports** menu.

Attribute Census Report Menu



2. The **Attribute Census Report** screen appears.

Attribute Census Report Screen



3. Select the range of **Filter Criteria** to include in the list or leave the fields blank to include all the Individual records.
4. Enter the **Attribute Date From** and **Thru** to define the date range for the report.
5. Select the **Position Status** you want to **Print** on the report; **All**, **Active**, or **Inactive**.
6. In the **Individual Active As of** Date field, enter the date to find Individuals active as of that date (the default is the current date) to **Print** on the report.
7. Select a field by which to summarize the report in the **Summary By** section; **Company**, **Department ID**, **Position Division**, **Position Location**, or **Position Program**.

8. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Attribute Census Report

Continental Products Unlimited
HR Attribute Census Report
Summary By Company

PAGE 1

Report Filter
Print: All Individuals   Individual Active As Of 10/18/2017

Description		Count	Percent of Attribute	Percent of Individuals
Company:	Continental Products Unlimited			
Family Status				
Lives alone		2	33.33%	33.33%
Lives with spouse		4	66.67%	66.67%
	Total	6		
New Hire Source				
LinkedIn		1	100.00%	16.67%
	Total	1		
Total Individuals				6

*** End of Report ***

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FMLA REPORT

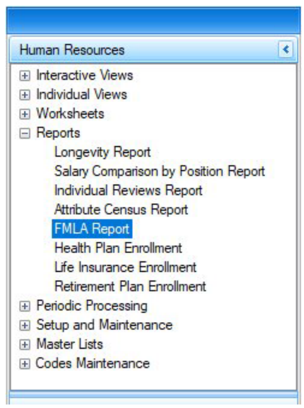
Use the **FMLA Report** to view employees requesting leave under the FMLA.

The Family and Medical Leave Act of 1993 (**FMLA**) is a United States labor law requiring covered employers to provide employees with job-protected and unpaid leave for qualified medical and family reasons.

To produce the **FMLA Report**, follow these steps:

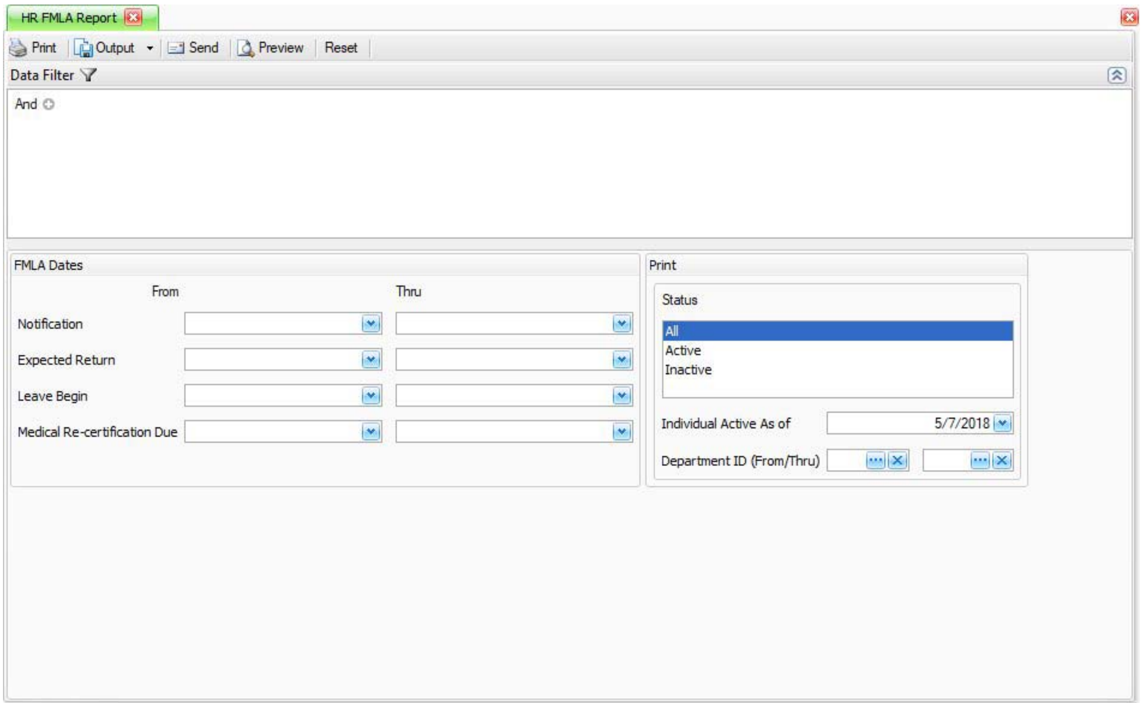
1. Select **FMLA Report** from the **Reports** menu.

FMLA Report Menu



2. The **FMLA Report** screen appears.

FMLA Report Screen



3. Select the range of **Filter Criteria** to include in the list or leave the fields blank to include all the Individual records.
4. To define a date range for the report, you can enter the **From** and **Thru** dates for one or more of the following **FMLA Dates**:
    - **Notification**
    - **Expected Return**
    - **Leave Begin**
    - **Medical Re-certification Due**
5. Select the **Status** you want to **Print** on the report; **All**, **Active**, or **Inactive**.
6. In the **Individual Active As of** Date field, enter the date to find Individuals active as of that date (the default is the current date) to **Print** on the report.
7. Select a **Department ID From** and **Thru** to **Print** individuals for a range of Departments, or leave the field blank to include all Departments. Select the “X” button to clear the field.

8. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

FMLA Report

Continental Products Unlimited
Family And Medical Leave Act

PAGE 1

Report Filter		**Individual Active As Of**	10/18/2017
Position Status	All Individuals	**Department**	
Notification Date From		**Notification Date Thru**	
Expected Return Date From		**Expected Return Date Thru**	
Leave Begin Date From		**Leave Begin Date Thru**	
Medical Recertification Due From		**Medical Recertification Due Thru**	

Individual ID BOU001 **Address** 501 N Hamilton Ave **Phone** (612)-555-1212 **Status** Active
Name Bourne, Linda K
Edina MN 55435

Notify Date	ER Response #1 / Desig Notice #2	Leave Begin / Expected Return / Expiration Date	Leave Reason / Leave Type / Location	Med Cert. Due / Med Cert Received / Med Re- Cert.Due	Intermittent / Med. Cert Req / Work Related	Status / Delivery Method / Delivery Comment	Hours Per Week
7/17/2017	7/19/2017	8/17/2017	Spouse	7/17/2017	☐	Approved	0.00
	7/21/2017	10/15/2017	Medical	7/17/2017	☐	Email	
		8/31/2017	Minnesota	8/1/2017	☐		

Notes Out for 8 weeks

*** End of Report ***

10/18/2017 1:47 PM **Kent.Heitkamp**

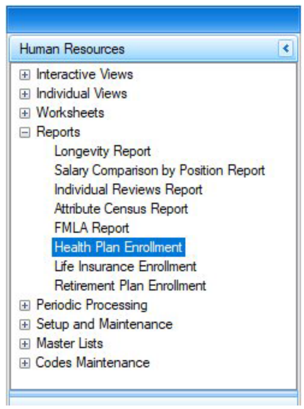
HEALTH PLAN ENROLLMENT REPORT

The **Health Plan Enrollment Report** allows you to see the health care plan status of Individuals.

To produce the **Health Plan Enrollment Report**, follow these steps:

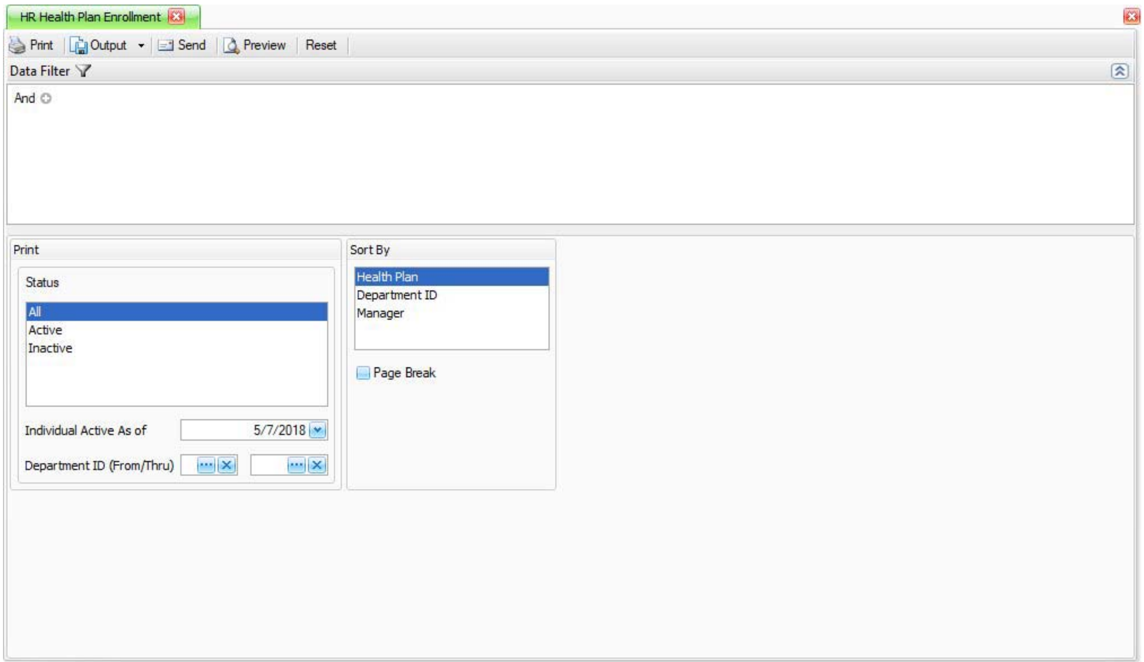
1. Select **Health Plan Enrollment Report** from the **Reports** menu.

Health Plan Enrollment Report Menu



2. The **Health Plan Enrollment Report** screen appears.

Health Plan Enrollment Report Screen



3. Select the range of **Filter Criteria** to include in the list or leave the fields blank to include all the Individual records.
4. Select the **Status** you want to **Print** on the report; **All**, **Active**, or **Inactive**.
5. In the **Individual Active As of** Date field, enter the date to find Individuals active as of that date (the default is the current date) to **Print** on the report.
6. Select a **Department ID From** and **Thru** to **Print** individuals for a range of Departments, or leave the field blank to include all Departments. Select the “X” button to clear the field.
7. Select a field by which to sort the report in the **Sort By** section; **Health Plan**, **Department ID**, or **Manager**.
8. Mark the **Page Break** check box if you want the report to start a new page each time your selected Sort By option changes.

9. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Health Plan Enrollment Report

Continental Products Unlimited
Health Plan Enrollment
Sorted By Health Plan

PAGE 1

Report Filter		Position Status	All Individuals
Individual Active As Of	10/18/2017	Department ID	

Plan Description	Group Number
Medica Choice Passport - Single	83404

Individual ID Name	Department Manager	Policy Number	Employer Contribution	Employee Contribution
DOUBLA00001 Doubla, Mike	400	58115	132.00	132.00
GER001 Gerard, Timothy	400 BOU001	6562	132.00	132.00
JEN001 Jenkins, Kathy	400	6546	132.00	132.00
JOHNSON0001 Johnson, Steve	400 BOU001	45155	132.00	132.00
JON001 Jonchim, Maria	400 BOU001	569233	132.00	132.00
BOU001 Bourne, Linda	500 LUK001	83498167	132.00	132.00

*** End of Report ***

10/18/2017 1:49 PM

Kent.Heitkamp

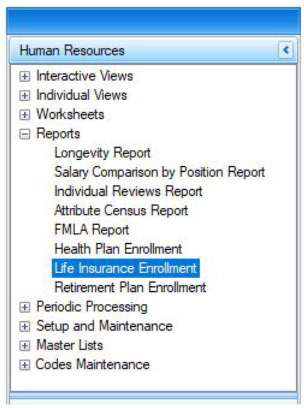
LIFE INSURANCE ENROLLMENT REPORT

The **Life Insurance Enrollment Report** allows you to see the life insurance status of Individuals.

To produce the **Life Insurance Enrollment Report**, follow these steps:

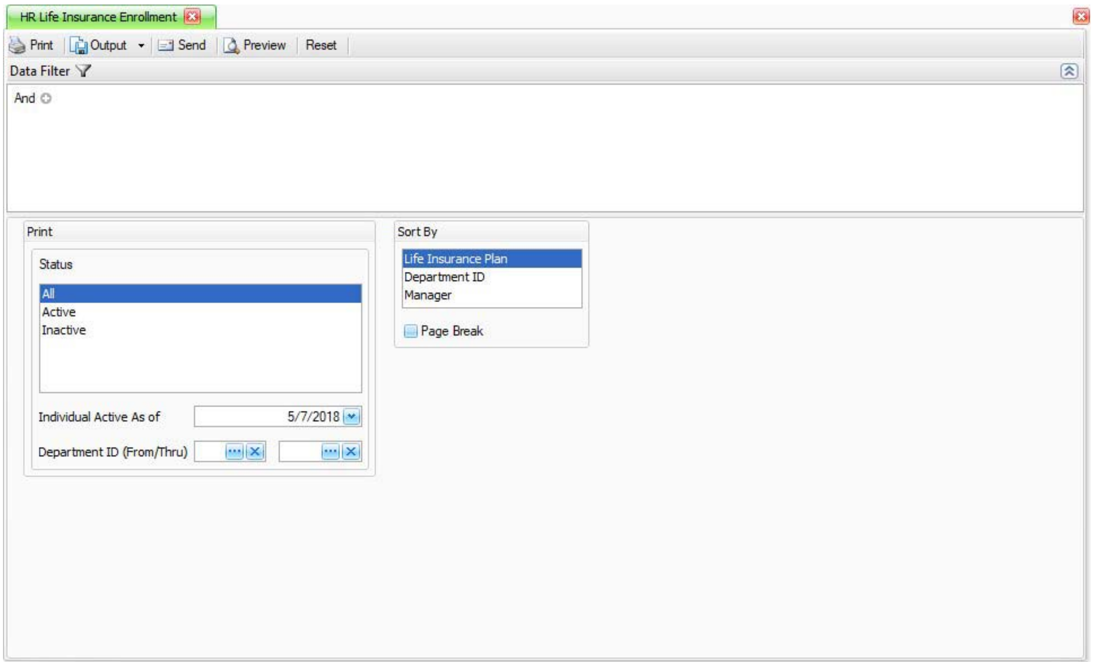
1. Select **Life Insurance Enrollment Report** from the **Reports** menu.

Life Insurance Enrollment Report Menu



2. The **Life Insurance Enrollment Report** screen appears.

Life Insurance Enrollment Report Screen



3. Select the range of **Filter Criteria** to include in the list or leave the fields blank to include all the Individual records.

4. Select the **Status** you want to **Print** on the report; **All**, **Active**, or **Inactive**.

5. In the **Individual Active As of** Date field, enter the date to find Individuals active as of that date (the default is the current date) to **Print** on the report.

6. Select a **Department ID From** and **Thru** to **Print** individuals for a range of Departments, or leave the field blank to include all Departments. Select the "X" button to clear the field.

7. Select a field by which to sort the report in the **Sort By** section; **Life Insurance Plan**, **Department ID**, or **Manager**.

8. Mark the **Page Break** check box if you want the report to start a new page each time your selected Sort By option changes.

9. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Life Insurance Enrollment Report

Continental Products Unlimited
Life Insurance Enrollment
Sorted By Life Insurance Plan

PAGE 1

Report Filter
View Active/Inactive Individual Active As Of 10/18/2017
Department ID

Plan Description			Group Number	
AIG			11A5127	
Individual ID Name	Manager Department ID	Policy Number	Employer Contribution	Employee Contribution
GER001 Gerard, Timothy K	Gerard, Timothy K 400	55564	8.00	0.00
MetLife			18227485	
Individual ID Name	Manager Department ID	Policy Number	Employer Contribution	Employee Contribution
BOU001 Bourne, Linda K	Bourne, Linda K 500	5546106797	12.00	0.90
DOUBLA00001 Doubla, Mike K	400	55654	0.00	0.00
JEN001 Jenkins, Kathy C	400	847941	0.00	0.00
JON001 Jonchim, Maria K	Jonchim, Maria K 400	58489	8.00	0.00

*** End of Report ***

10/18/2017 1:50 PM Kent.Heitkamp

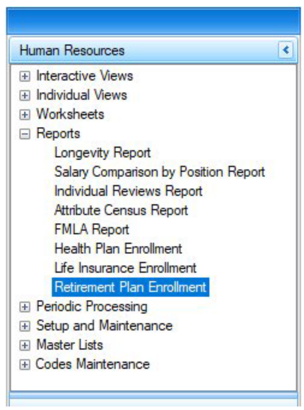
RETIREMENT PLAN ENROLLMENT REPORT

The **Retirement Plan Enrollment Report** allows you to see the retirement plan status of Individuals.

To produce the **Retirement Plan Enrollment Report**, follow these steps:

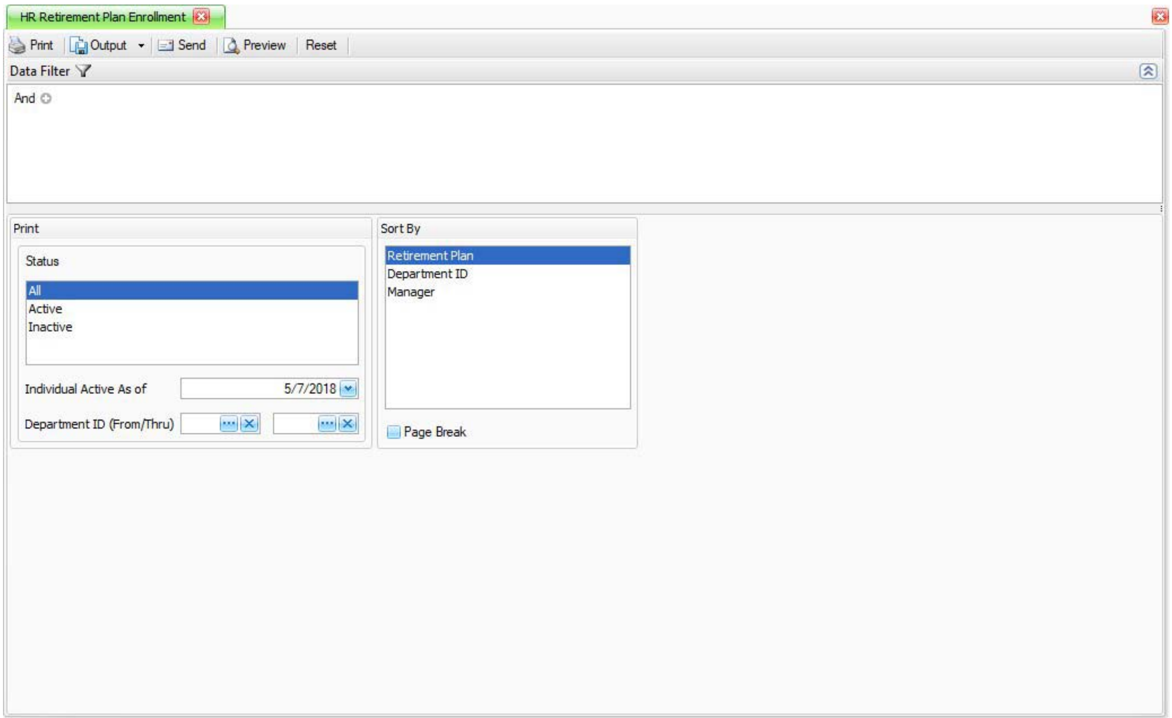
1. Select **Retirement Plan Enrollment Report** from the **Reports** menu.

Retirement Plan Enrollment Report Menu



2. The **Retirement Plan Enrollment Report** screen appears.

Retirement Plan Enrollment Report Screen



3. Select the range of **Filter Criteria** to include in the list or leave the fields blank to include all the Individual records.
4. Select the **Status** you want to **Print** on the report; **All**, **Active**, or **Inactive**.
5. In the **Individual Active As of** Date field, enter the date to find Individuals active as of that date (the default is the current date) to **Print** on the report.
6. Select a **Department ID From** and **Thru** to **Print** individuals for a range of Departments, or leave the field blank to include all Departments. Select the “X” button to clear the field.
7. Select a field by which to sort the report in the **Sort By** section; **Retirement Plan**, **Department ID**, or **Manager**.
8. Mark the **Page Break** check box if you want the report to start a new page each time your selected Sort By option changes.

9. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Retirement Plan Enrollment Report

Continental Products Unlimited
Retirement Plan Enrollment
Sorted By Retirement Plan

PAGE 1

Report Filter		**Individual Active As Of**	10/18/2017
Position Status	All	**Page Break**	No
Department			

Plan Description	Department ID	Manager	Account Number
Wealth Enhancement Group	400		3216549879

Individual ID	Name	Premium Method	Pre-Tax Contribution	After-Tax Contribution	Bonus Amount	Loan Amount
DOUBLA00001	Doubla, Mike	Percent	8.00	0.00	0.00	0.00
JEN001	Jenkins, Kathy	Percent	10.00	0.00	0.00	0.00

Plan Description	Department ID	Manager	Account Number
Wealth Enhancement Group	400	BOU001	3216549879

Individual ID	Name	Premium Method	Pre-Tax Contribution	After-Tax Contribution	Bonus Amount	Loan Amount
GER001	Gerard, Timothy	Percent	8.00	0.00	0.00	0.00
JOHNSON0001	Johnson, Steve	Percent	9.00	0.00	0.00	0.00
JON001	Jonchim, Maria	Percent	10.00	0.00	0.00	0.00

Plan Description	Department ID	Manager	Account Number
Wealth Enhancement Group	500	LUK001	3216549879

Individual ID	Name	Premium Method	Pre-Tax Contribution	After-Tax Contribution	Bonus Amount	Loan Amount
BOU001	Bourne, Linda	Percent	10.00	0.00	0.00	0.00

*** End of Report ***

10/18/2017 1:52 PM **Kent.Heitkamp**

PRODUCING WORKSHEETS

Use the Worksheets functions to produce worksheets to aid in filling out your Department of Labor reports, using the following tasks:

- The **EEO-1 Report** is a compliance survey mandated by federal statutes and regulations. The survey requires company employment data to be categorized by race/ethnicity, gender, and job category.
- Use the **VETS-4212 Report** screen to generate a worksheet listing employees and their military veteran status, if applicable.
- The **DOL Report** is made up of three EEO Summary reports in one report: the EEO New Hire Summary, the EEO Termination Summary, and the EEO Promotion Summary.

EEO-1 REPORT

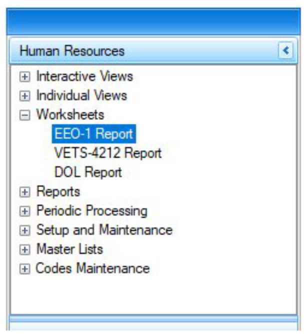
The **EEO-1 Report** is a compliance survey mandated by federal statutes and regulations. The survey requires company employment data to be categorized by race/ethnicity, gender, and job category.

The employment data used for the 2017 EEO-1 report should be collected using a payroll period in October, November, or December 2017, the fourth quarter of calendar year 2017. This payroll period is the 2017 “workforce snapshot period.”

To produce the **EEO-1 Report**, follow these steps:

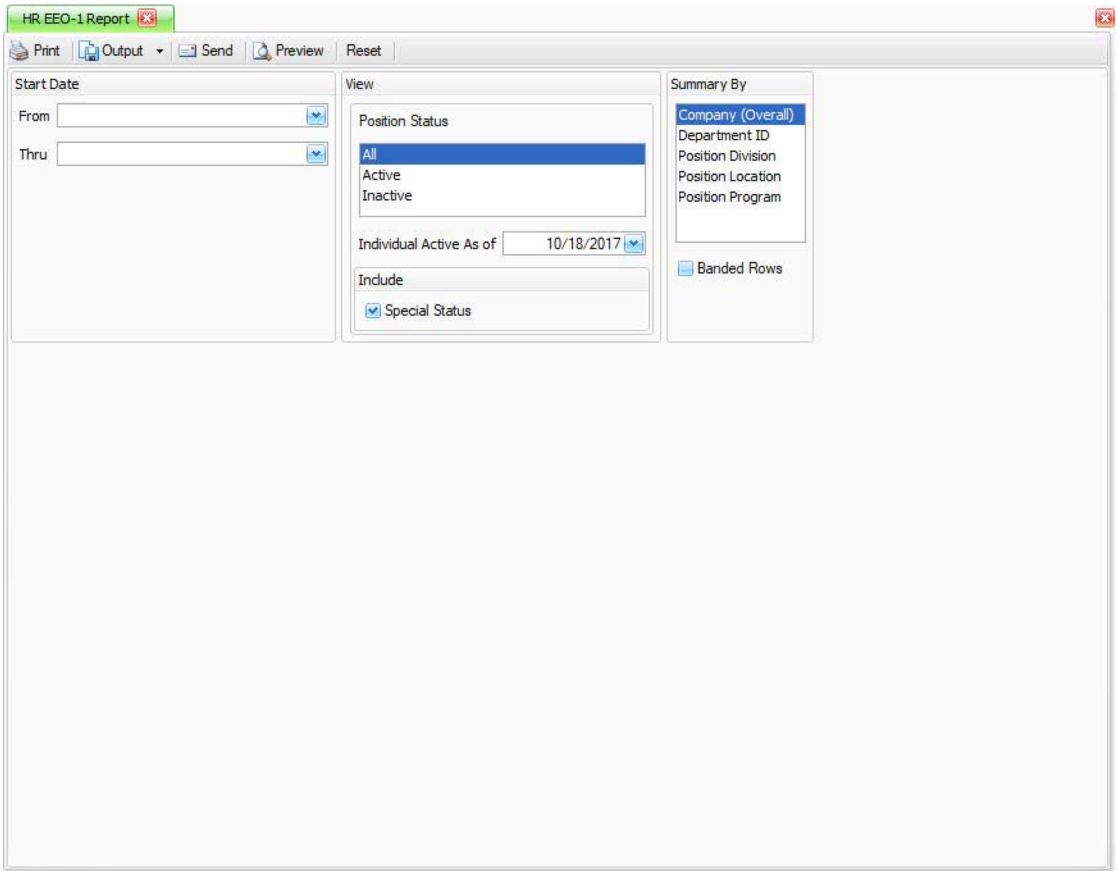
1. Select **EEO-1 Report** from the **Worksheets** menu.

EEO-1 Report Menu



2. The **EEO-1 Report** screen appears.

EEO-1 Report Screen



3. Select the range of **Filter Criteria** to include in the list or leave the fields blank to include all the Individual records.
4. Enter the **Start Date From** and **Thru** to define the date range for the report.
5. Select the **Position Status** you want to **View** on the report; **All**, **Active**, or **Inactive**.
6. In the **Individual Active As of** Date field, enter the date to find Individuals active as of that date (the default is the current date) to **Print** on the report.
7. To include groups, such as disabled, that have a special status, mark the **Include Special Status** check box.
8. Select a field by which to summarize the report in the **Summary By** section; **Company (Overall)**, **Department ID**, **Position Division**, **Position Location**, or **Position Program**.

9. Select the check box if you want to print the report in **Banded Rows** format, which highlights lines in the report in alternating bands of color (or gray on monochrome printers). This makes wide reports easier to read. You can define your default preference for the banded rows format on the System Manager Business Rules. You can then override your default choice when you print the report.

10. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

EEO-1 Report

Continental Products Unlimited
EEO-1 Report

PAGE 1

Summary By	Company (Overall)	**Start Date From**	
View	All Individuals	**Start Date Thru**	
Individual Active As Of	10/18/2017		

		Male									Female									
EEO	**Name**	**W**	**B**	**H**	**P**	**A**	**I**	**T**	**U**	**O**	**W**	**B**	**H**	**P**	**A**	**I**	**T**	**U**	**O**	**Total**
1	Officials - Managers										1									1
2	Professionals	3									1		1							5
	Grand Total	3									2		1							6

Legend

W - White
B - Black or African American
H - Hispanic or Latino
P - Native Hawaiian or Other Pacific Islander
A - Asian
I - American Indian or Alaska Native
T - Two or more Races
U - Unknown/Withheld
O - Other

*** End of Report ***

10/18/2017 1:54 PM **Kent.Heitkamp**

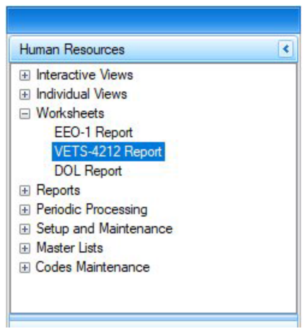
VETS-4212 REPORT

Use the **VETS-4212 Report** screen to generate a worksheet listing Employees and their military veteran status, if applicable.

To produce the **VETS-4212 Report**, follow these steps:

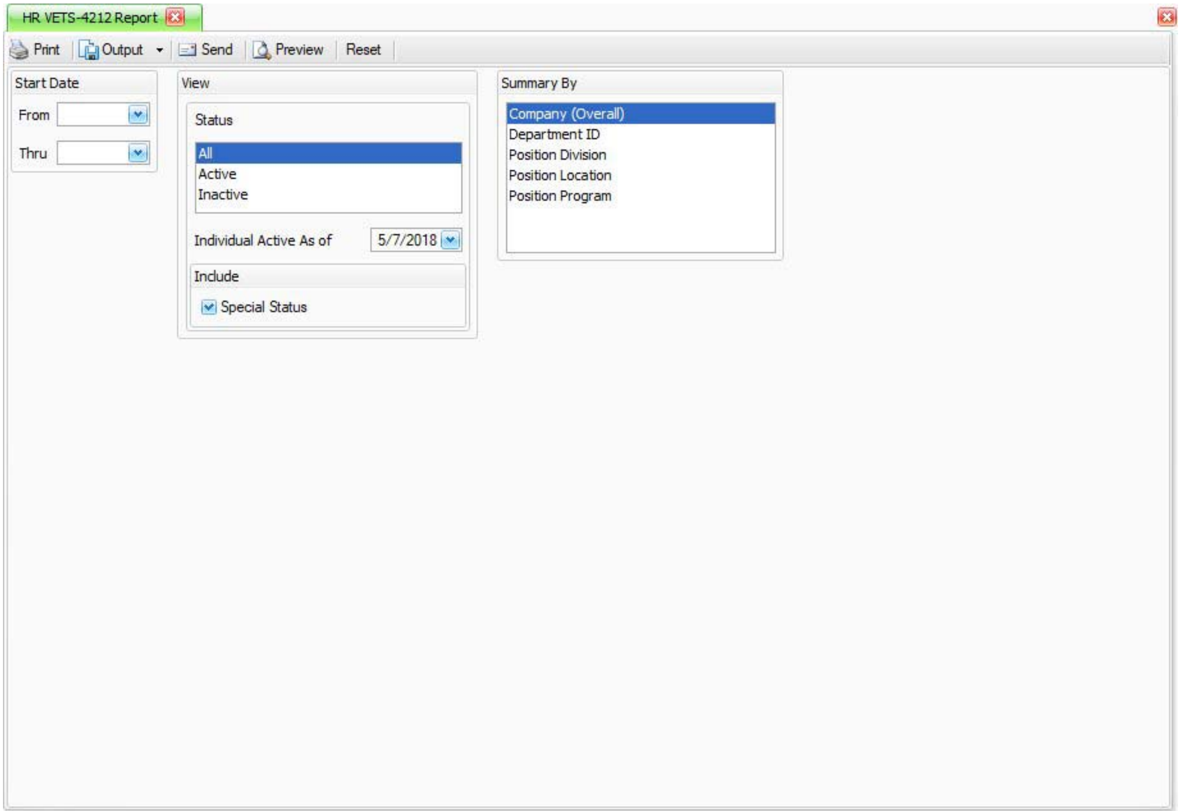
1. Select **VETS-4212 Report** from the **Worksheets** menu.

VETS-4212 Report Menu



2. The **VETS-4212 Report** screen appears.

VETS-4212 Report Screen



3. Select the range of **Filter Criteria** to include in the list or leave the fields blank to include all the Individual records.
4. Enter the **Start Date From** and **Thru** to define the date range for the report.
5. Select the **Status** you want to **View** on the report; **All**, **Active**, or **Inactive**.
6. In the **Individual Active As of** Date field, enter the date to find Individuals active as of that date (the default is the current date) to **Print** on the report.
7. To include groups, such as disabled, that have a special status, mark the **Include Special Status** check box.
8. Select a field by which to summarize the report in the **Summary By** section; **Company (Overall)**, **Department ID**, **Position Division**, **Position Location**, or **Position Program**.

9. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

VETS-4212 Report

Continental Products Unlimited
Vets 4212 Report

PAGE 1

Summary By Company
View All
Individual Active As Of 10/18/2017

Start Date From
Start Date Thru

		All Employees							New Hires						
Category	**Category Name**	**D**	**V**	**O**	**M**	**R**	**N**	**Total**	**D**	**V**	**O**	**M**	**R**	**N**	**Total**
1	Officials - Managers						1	1						1	1
2	Professionals			1		1	3	5			1		1	3	5
	Report Total:			1		1	4	6			1		1	4	6

Legend

D - Disabled Veteran
V - Vietnam Era Veteran
O - Other Veteran
M - Armed Forces Service Medal Veteran
R - Recently Separated Veteran
N - Non-Veteran

*** End of Report ***

10/18/2017 2:00 PM **Kent.Heitkamp**

DOL REPORT

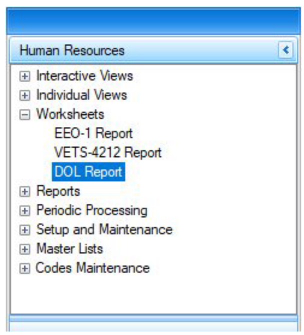
The **DOL Report** is made up of three EEO Summary reports in one report: the EEO New Hire Summary, the EEO Termination Summary, and the EEO Promotion Summary.

The DOL Report will report all Active Status changes as a hire.

To produce the **DOL Report**, follow these steps:

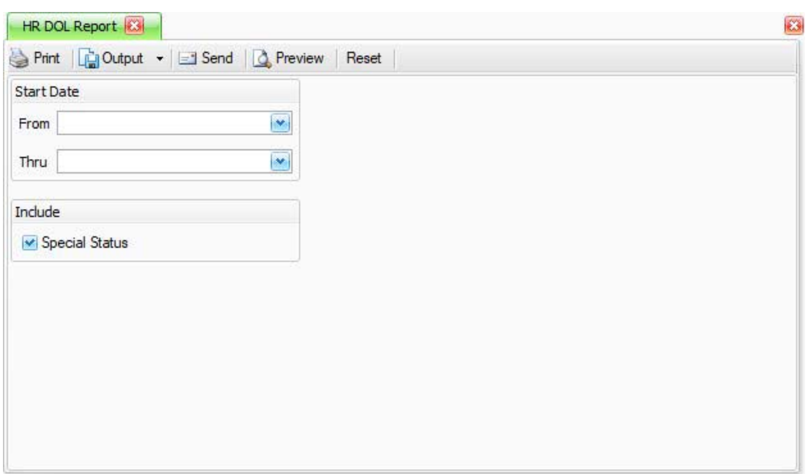
1. Select **DOL Report** from the **Worksheets** menu.

DOL Report Menu



2. The **DOL Report** screen appears.

DOL Report Screen



3. Enter the **Start Date From** and **Thru** to define the date range for the report.

4. To include groups, such as disabled, that have a special status, mark the **Include Special Status** check box.

5. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

DOL Report

Continental Products Unlimited
Department of Labor Activity Report
Begin - End

PAGE 1

Hires

EEO1 Category	Gender	Ethnicity		Total
Officials - Managers	Female	White		1.000
			Gender Total	1.000
			Group Total	1.000

Hires Full Time

EEO1 Category	Gender	Ethnicity		Total
Officials - Managers	Female	White		1.000
			Gender Total	1.000
			Group Total	1.000

*** End of Report ***

10/18/2017 2:02 PM Kent.Heitkamp

PERIODIC PROCESSING

7

OVERVIEW

Use the Periodic Processing menu functions to indicate which fields will be checked and updated when the Update Employees function is run. You can use the Initialize Individuals to import your Employees into the Individuals function.

The Periodic Processing menu has the following functions:

- Use the **Employee Interface Maintenance** function to turn off fields to integrate into System Manager/Payroll. Fields that should be transferred to System Manager/Payroll should be checked in the Enable column, and those not transferring to System Manager/Payroll should be unchecked.
- The **Update Employees** function allows you to push individual information from HR to System Manager/Payroll Employees.

  Individuals must have been an active "employee" prior to the cutoff date and not have become inactive prior to the current payroll year in order to create a new Employee from the Individual information. Note that the Active/Inactive status is managed by the Standard Code assigned to the Individual Status entries.
- The **Initialize Individuals** function allows you to create individuals in the HR system using your current System Manager/Payroll employees.

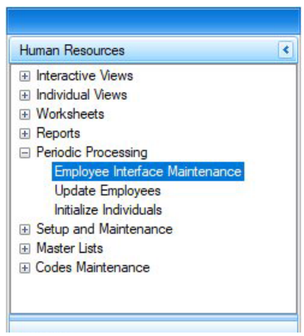
EMPLOYEE INTERFACE MAINTENANCE

Use the **Employee Interface Maintenance** function to turn off fields to integrate into System Manager/Payroll. Fields that should be transferred to System Manager/Payroll should be checked in the Enable column, and those not transferring to System Manager/Payroll should be unchecked.

To set up the **Employee Interface Maintenance**, follow these steps:

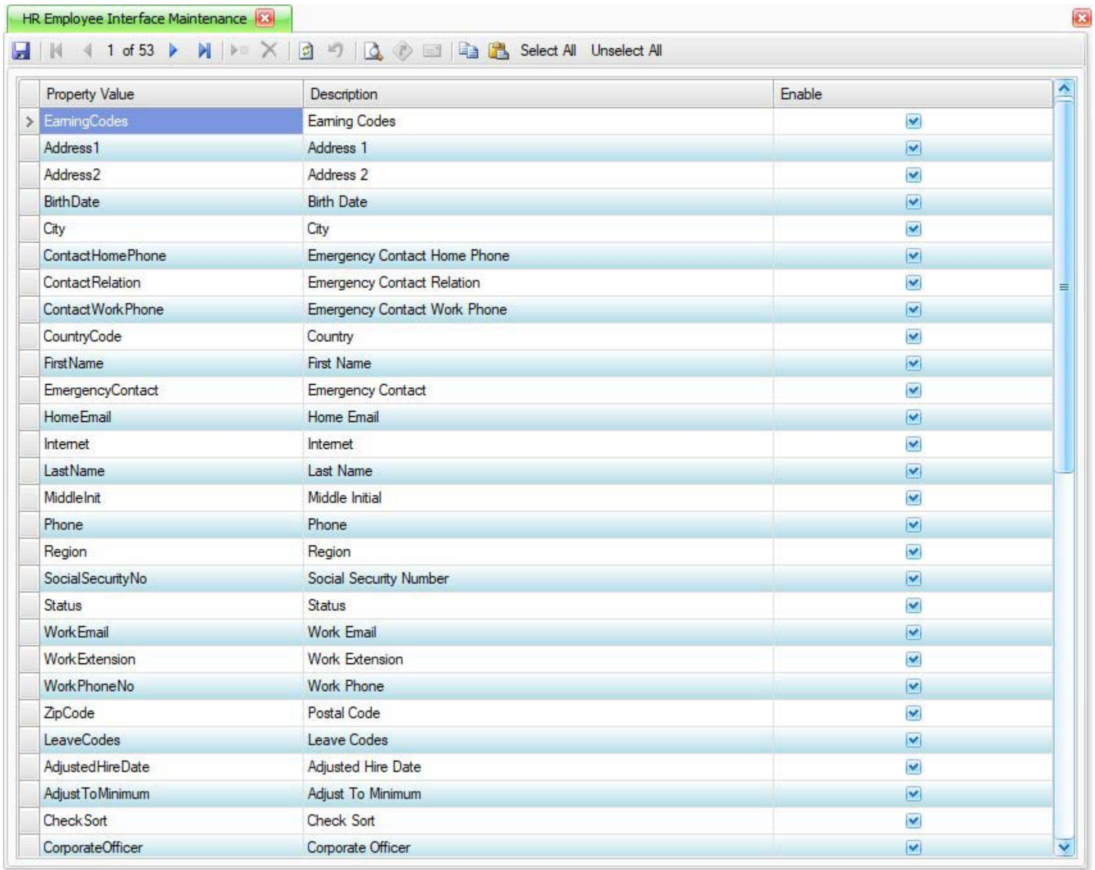
1. Select **Employee Interface Maintenance** from the **Periodic Processing** menu.

Employee Interface Maintenance Menu



2. The **Employee Interface Maintenance** screen appears.

Employee Interface Maintenance Screen



Property Value	Description	Enable
EarningCodes	Earning Codes	☑
Address1	Address 1	☑
Address2	Address 2	☑
BirthDate	Birth Date	☑
City	City	☑
ContactHomePhone	Emergency Contact Home Phone	☑
ContactRelation	Emergency Contact Relation	☑
ContactWorkPhone	Emergency Contact Work Phone	☑
CountryCode	Country	☑
FirstName	First Name	☑
EmergencyContact	Emergency Contact	☑
HomeEmail	Home Email	☑
Internet	Internet	☑
LastName	Last Name	☑
MiddleInit	Middle Initial	☑
Phone	Phone	☑
Region	Region	☑
SocialSecurityNo	Social Security Number	☑
Status	Status	☑
WorkEmail	Work Email	☑
WorkExtension	Work Extension	☑
WorkPhoneNo	Work Phone	☑
ZipCode	Postal Code	☑
LeaveCodes	Leave Codes	☑
AdjustedHireDate	Adjusted Hire Date	☑
AdjustToMinimum	Adjust To Minimum	☑
CheckSort	Check Sort	☑
CorporateOfficer	Corporate Officer	☑

3. The **Property Value** and **Description** of the fields that are common between Human Resources Individuals, and Payroll Employees are listed and cannot be edited.
4. The **Enable** check box is selected for all fields by default. Clear any fields you do not want to update in the Payroll Employee Information, from information set up in the Human Resources Individuals setup.
5. Click the **Save** button on the toolbar to save your changes.

NOTE: You cannot add any fields to this list, or remove any fields from this list.

UPDATE EMPLOYEES

The **Update Employees** function allows you to push individual information from HR to SM/PA Employees.

NOTE: The Update Employees is a one-way function, updating System Manager/Payroll with information from Human Resources.

Individuals must have been an active “Individual” prior to the Changes As Of Date and not have become inactive prior to the current payroll year in order to create a new Employee from the Individual information. Note that the Active/Inactive status is managed by the Status assigned to the Individual on the Positions tab.

This function should be run after changes have been made to Individuals, or new Individuals have been added to the Human Resources function.

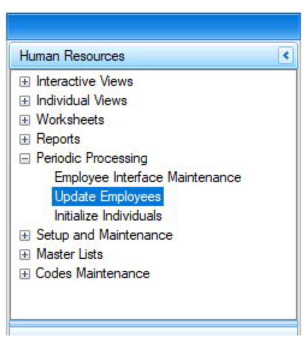
If you have both Payroll and Human Resources, the best practice when editing Individuals/Employees is to edit the Individual using the Human Resources function, and then use the Update Employees function to update the System Manager/Payroll Employees with the information from Human Resources.

When adding new Individuals/Employees it is also best to add the Individual using the Human Resources and use the Update Employees to add the Employees to System Manager/Payroll.

To work with the **Update Employees** function, follow these steps:

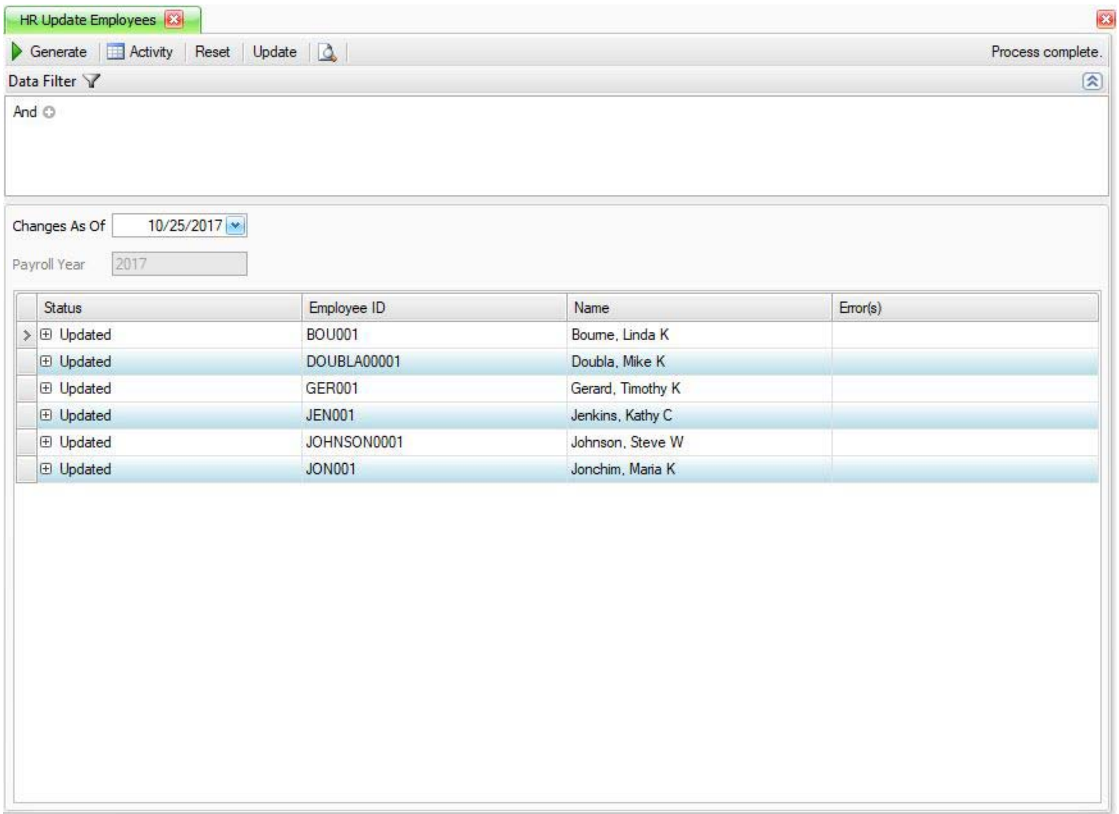
1. Select **Update Employees** from the **Periodic Processing** menu.

Update Employees Menu



2. The **Update Employees** screen appears.

Update Employees Screen



3. Select the range of **Filter Criteria** to include in the update. Leave the filter criteria blank to include all records.
4. Enter the **Changes As Of** date to look at the date the Individual was last edited.
5. The **Payroll Year** field will display the current payroll year as set in Payroll. If Payroll is not installed, this field will be blank.

6. Select a command button:

Command Buttons

Name	Description
Generate	Run a comparison between HR and SM/PA to check for differences in employee information. Does NOT apply any changes to the employee data.
Activity	View the Activity Log for completed executions of the process.
Reset	Set all fields to their default values.
Update	Update Payroll with the individual changes in the HR application. This process will abort if any Employees have errors as a result of the changes.
Preview	Open a preview of the log. This will run the Generate process, which does not apply any changes to the employee data.

7. Press the **Generate** button to run the comparison between HR and SM/PA and to check for errors.
    - If there are errors, a print preview of the error report will appear.
    - The Generate button does not apply any changes to the data.

NOTE: The Status column on the Position tab of the Individuals screen must be set to Active in order for the system to create a new SM/PA Employee.

8. The **Status**, **Employee ID**, **Name**, and **Error(s)** are displayed from the generated data.
9. Click the Plus (+) next to the Status to view the Detail information that will be updated.
10. The **Property**, **Original Value**, **Reference**, **New Value**, and **Error(s)** will be displayed.
11. The information in the **New Value** for the **Property** will be updated in the System Manager/Payroll Employee record.

12. Review the Error(s) column to see what errors exist from the link between the Individual and Employee. Use either the Individuals or Employee Information functions to correct the errors.

    If an Employee ID has a New Status, the Employee ID and information will be added to the System Manager or Payroll Employee Information.

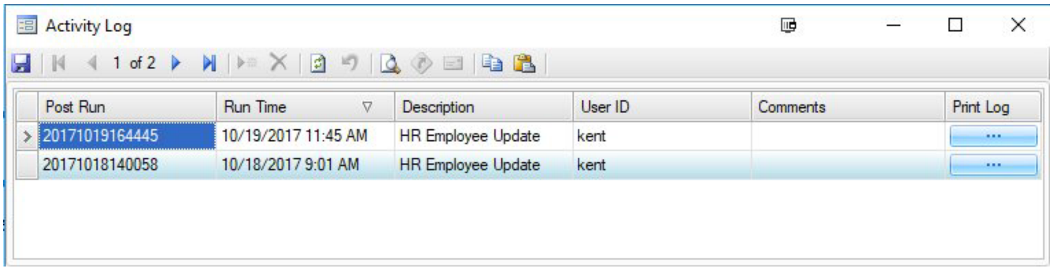
13. Once you have made all of the necessary corrections, press **Generate** again and you will get the message that tells you that all updates are valid.
14. Press the **Preview** button to preview the Update Employee List with the changes that will be updated from Human Resources into System Manager or Payroll. This preview will consist of the information currently displayed on the screen.
15. Once you have previewed the changes and are ready to update, go back to the **HR Update Employees** Screen and click the **Update** button.
16. You will receive a message showing that the update has been completed, and the Update Employee Journal will be displayed.

Activity Log

Use the **Activity Log** to view all update activity for administrative purposes.

Name	Displays
Post Run	The system assigned post run ID.
Run Time	The date and time the update employees was run.
Description	The update employees description.
User ID	The user who performed the update employees.
Comments	The comments, if applicable, entered in the Comments field.
Print Log	A PDF version of the original journal if you click the ... button.

Activity Log Dialog Box



NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Update Employee Journal

Continental Products Unlimited
Update Employees Log

PAGE 1

Report Filter
Change Of As: 10/20/2017 **Payroll Year:** 2017

Employee ID BOU001 **Name** Bourne, Linda K

Property	Original Value	Reference	New Value	Status	Error(s)
JobTitle	Admin. Asst.		President	Updated	
LastReviewDate	11/12/2004		1/4/2017	Updated	
NextReviewDate	11/12/2005		1/4/2018	Updated	
Salary	7500.00		10500.00	Updated	
StartDate	1/9/1987		9/21/2000	Updated	
PayDistribution	2		1	Updated	
EarnCodeId		VAC	VAC	New	
EarnCodeId		SIC	SIC	New	
EarnCodeId		REG	REG	New	
AccountNumber	65420659847	65420659847		Updated	
AccountNumber		Check	65420659847	New	
AccountType	0	Check	2	New	
AmountPercent	0	65420659847	500.00	New	
PrenoteIn	False	65420659847		New	
PrenoteOut	False	65420659847		New	
RoutingCode		65420659847	111111118	New	
AmountPercent	0	Check	9999999.00	New	
PrenoteIn	False	Check		New	
PrenoteOut	False	Check		New	
DefaultWH	False	FED	True	Updated	
TaxAuthorityDtlId	0	MN\Override		New	

Employee ID DOUBLA00001 **Name** Doubla, Mike K

Property	Original Value	Reference	New Value	Status	Error(s)
AdjustedHireDate			5/31/1998	Updated	
DepartmentId	500		400	Updated	
JobTitle			Programmer	Updated	
LastReviewDate			10/18/2017	Updated	
NextReviewDate			1/18/2018	Updated	
StartDate	5/31/1998		10/17/2017	Updated	

10/19/2017 11:46 AM **Kent.Heitkamp**

INITIALIZE INDIVIDUALS

The **Initialize Individuals** function allows you to create individuals in the Human Resources system using your current System Manager/Payroll Employees.

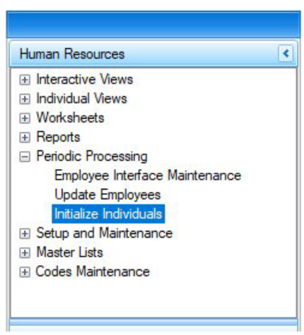
The Initialize Individuals function will update your Human Resources with information in the fields that are common between the System Manager/Payroll Employees and the Human Resources Individuals. Once the Initialize Individuals has completed you will need to go into the Individuals function and complete the setup of the Individuals with the information that is Human Resources specific.

WARNING: The Initialize Individuals function will clear all Individuals in the Human Resources system and load only active Employees from System Manager/Payroll. Employees with an inactive status will not be created in Human Resources.

To work with the **Initialize Individuals** function, follow these steps:

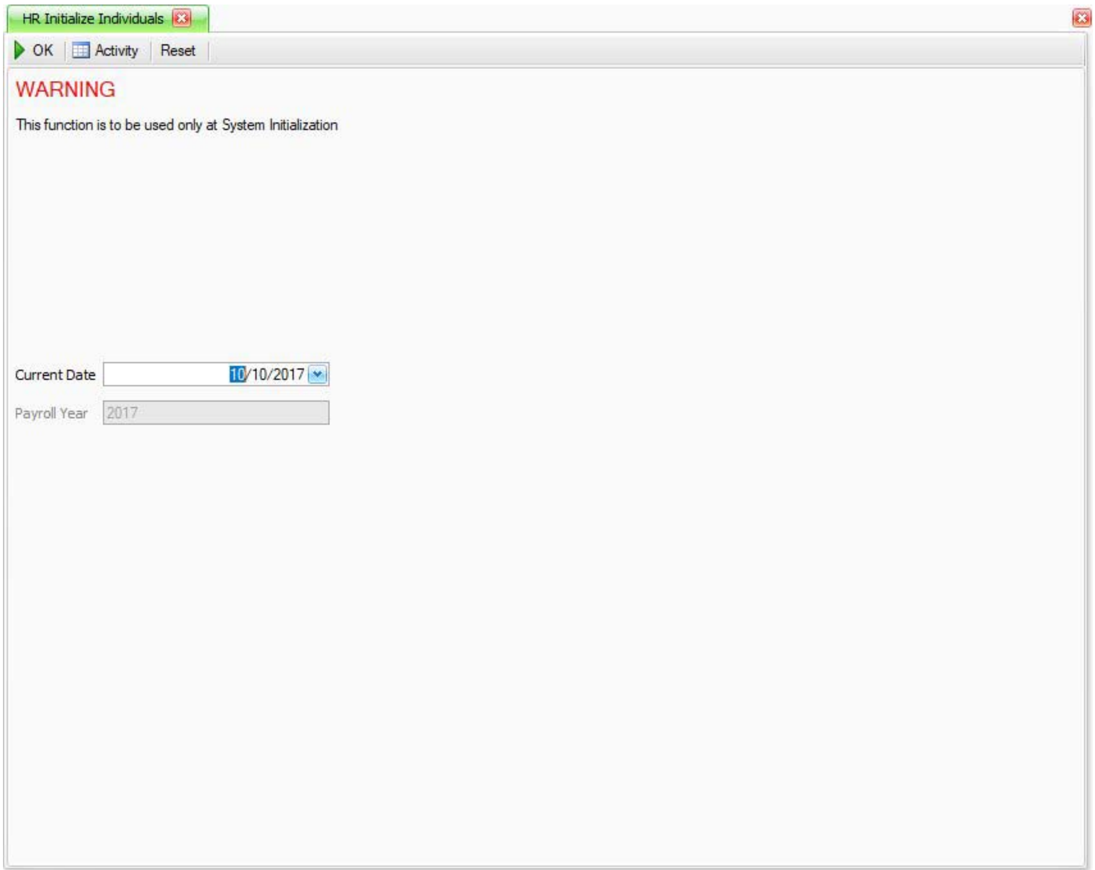
1. Select **Initialize Individuals** from the **Periodic Processing** menu.

Initialize Individuals Menu



2. The **Initialize Individuals** screen appears.

Initialize Individuals Screen



3. Enter a **Current Date** to be used when generating time-sensitive data for each Individual.
4. The **Payroll Year** field will display the current payroll year as set in Payroll. If Payroll is not installed, this field will be blank.

5. Select a command button:

Command Buttons

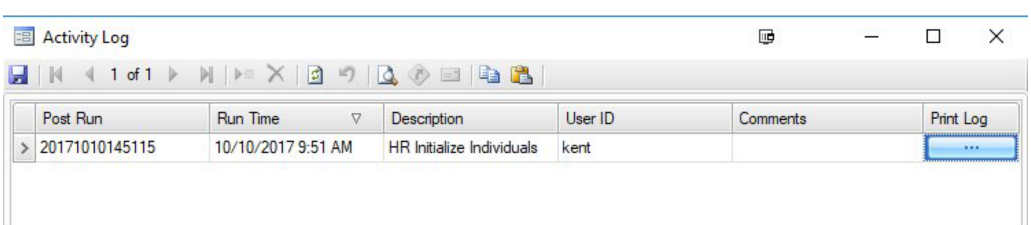
Name	Description
OK	Begin the process of clearing the Human Resources Individuals and repopulating from System Manager/Payroll.
Activity	Display the Activity Log to view process activity.
Reset	Set all fields to their default values.

Activity Log

Use the **Activity Log** to view all update activity for administrative purposes.

Name	Displays
Post Run	The system assigned post run ID.
Run Time	The date and time the initialize individuals was run.
Description	The initialize individuals description.
User ID	The user who performed the initialize individuals.
Comments	The comments, if applicable, entered in the Comments field.
Print Log	A PDF version of the original journal if you click the ... button. Not available for this function.

Activity Log Dialog Box



GLOSSARY

G

401(K)

A type of retirement plan that allows employees to save and invest money for retirement. 401(K) plans may include contributions from the employee, or contributions from both the employee and the employer.

account

A storage unit of financial data in accounting, usually grouping related information under one account number or account ID.

adjusted gross income

Gross income, including wages, salaries and tips, minus contributions to certain employee benefit and retirement plans, such as 401(K)s and IRAs.

application

A software package made up of several related programs (functions) and files. Usually an application is named after a common accounting practice—for example, Accounts Payable, Accounts Receivable, or Payroll.

audit trail

A detailed record of accounting activity used to account for the source of every dollar in the accounts. Even though the most common types of accounting errors are eliminated or greatly reduced when you use the General Ledger system, you should always have an audit trail.

back up

To make a copy of data for archival purposes. For example; you would want to back up the company database before you purged history so that you could retrieve the data if you had to.

base pay

A rate or amount of pay for a standard work period, job, or position exclusive of additional payments or allowances.

beneficiary

A beneficiary is a person designated as the recipient of funds or other property under a will, trust, insurance policy, etc.

company

In TRAVERSE, a business record associated with its own database, tables, and menu of applications.

contingent beneficiary

A contingent beneficiary is specified by an insurance contract holder or retirement account owner as receiving proceeds if the primary beneficiary is deceased, unable to be located or refuses the inheritance at the time the proceeds are to be paid.

conversion

The process of updating existing files, programs, or applications to the current version. Compare installation.

deductible

A deductible is a specified amount of money that the insured must pay before an insurance company will pay a claim.

deduction

Items, such as state taxes and home mortgage interest expenses, that are subtracted from an employee's gross income to reduce their income subject to tax.

dependent

A person that depends on someone else for financial, emotional or other support.

direct deposit

Electronic funds that are deposited directly into your bank account rather than through a paper check. Common uses of a direct deposit include income tax refunds and pay checks.

Earned Income Credit (EIC)

A special credit for certain persons who work. The credit reduces the amount of tax the employee owes (if any) and is intended to offset some of the increases in living expenses and social security taxes. Refer to federal publication 596 for more information on EIC. The EIC code is no longer valid.

earning code

A code used to indicate the type of work an employee performed for the earnings, such as assembly, administrative, overtime, or weekend work.

earnings

Something, such as wages, earned.

earning type

A category of earnings, such as Regular Pay or Vacation Pay.

EEO Report

The EEO Report is a compliance survey mandated by federal statutes and regulations. The survey requires company employment data to be categorized by race/ethnicity, gender, and job category.

employee

One employed by another usually for wages or salary and in a position below the executive level.

employer

An organization which provides a person or persons with jobs in exchange for wages or salaries.

employer cost

A benefit provided to employees by an employer such as 401(K) contributions or dental insurance costs.

Employer Identification Number (EIN)

A nine-digit number issued to employers by the Internal Revenue Service in order to identify the tax accounts of employers.

employer tax

Required payments of money to the government by the employer.

Equal Employment Opportunity (EEO) class

An equal employment opportunity classification.

exemptions

A portion of an employee’s total income multiplied by the number of dependants they claimed on their W-4 Form, on which no tax is imposed.

Federal Withholding (FWH)

A deduction (as from wages, fees, or dividends) levied at a source of income as advance payment on federal income tax.

field

A region on the screen that accepts input from the user; also, one element of a record in a file. On the screen, most fields are labeled.

file

A collection of records stored under a particular name. Function screens often represent files, but you do not directly see a file. Compare table.

FMLA

The Family and Medical Leave Act of 1993 (FMLA) is a United States labor law requiring covered employers to provide employees with job-protected and unpaid leave for qualified medical and family reasons.

Form 941

The Employer’s Quarterly Federal Tax Return form. Employers who withhold income tax on wages, or who must pay social security or Medicare tax, are required to file Form 941 each quarter of the calendar year. Refer to federal Form 941 and/or its instructions for more information.

function

A menu item that leads to a full screen. Most functions have a corresponding program. Compare table.

general ledger

A record of accounts in terms of a chart of accounts and accounting periods. The General Ledger application tracks the effects on accounts from transactions entered in General Ledger and interfaced applications, and it is updated by other applications interfaced with it.

gross pay

Also referred to as taxable income. All money, goods, and property received by an employee which must be included as taxable income. Compare net pay, income subject to tax.

health insurance plan

Health insurance is a type of insurance coverage that pays for medical and surgical expenses incurred by the insured. Health insurance can reimburse the insured for expenses incurred from illness or injury, or pay the care provider directly.

income subject to tax

Income, after subtracting deductions and personal exemptions, that is subject to federal income tax. Compare gross pay, net pay.

individual

An single person with information entered into the human resources function. Similar to an employee.

input mask

A structure that specifies the number and type of characters in each segment and the special character that separates segments. For example, the input mask for a telephone number might be: (###)-###-####.

installation

The process of adding an application to an existing system. Compare conversion.

interface

To join to another application for the purpose of having information entered in one application update information in another application's tables.

job title

A formal name and description for a position a person holds within a company describing the function they server for the company.

journal

A chronological record of transactions.

journal entries

Transactions recorded in a journal.

labor class

Categories which allow you to group together employees with similar job responsibilities.

life insurance plan

Life insurance, is a contract between an insurance policy holder and an insurer, where the insurer promises to pay a designated beneficiary a sum of money (the benefit) in exchange for a premium, upon the death of an insured person (often the policy holder).

magnetic media

An electronic file that contains W-2 data, submitted to the federal government in lieu of printed W-2 forms.

Medicare

Hospital insurance tax which funds the federal health program for persons over age 65.

menu

A list of applications, functions, options, or other menus.

net pay

The actual dollar amount taken home by the employee after all deductions have been subtracted from the gross pay amount on the paycheck. Compare gross pay.

OASDI

Old-Age, Survivors, and Disability Insurance tax. OASDI’s contribution and benefit base is currently $128,400 for 2018. This is the maximum annual amount of earnings on which OASDI taxes are paid and the maximum annual amount used in determining a person's OASDI benefits.

override pay

An earnings amount to be used in the place of the normal salary amount.

position

The function an employee serves within a company. Similar to a job title.

post

To transfer information from one place to another, usually at the end of the day or at a distinct break in business.

profit sharing

A system or process under which employees receive a part of the profits made by an industrial or commercial enterprise.

program

A self-contained list of executable code, written and implemented to do a task. Most programs are represented by a function on a menu. Compare function.

purge

To remove from the system. Compare restore.

record

A unit of information that has other pieces of information assigned to it. Each record is assigned an ID so that the table can sort information in terms of record IDs.

recurring entries

Journal entries you make regularly in the same amounts—for example, time ticket entries, deductions, and employer costs. You can set up recurring entries and copy them all at once at the appropriate times.

restore

To bring information back to its original place and condition. Compare purge.

retirement plan

A retirement plan is a financial arrangement designed to replace employment income upon retirement. These plans may be set up by employers, insurance companies, trade unions, the government, or other institutions.

routing code

Set of numbers associated with a checking, savings, or other bank account that associates a financial institution with the account. This number is used to determine where to route funds to or from. Any individuals seeking direct deposit from a company will typically have to provide a routing and account number.

run code

A number that identifies the group to which a recurring entry belongs.

salary

The person receiving a salary is not paid a smaller amount for working fewer hours, nor is he paid more for working overtime. This person is considered to be an “exempt” employee.

source code

A code that identifies the source of a journal entry.

State Unemployment Insurance (SUI)

An employer-paid tax that contributes to payments to laid-off workers to provide benefits to most workers out of work, due to no fault of their own, for periods between jobs.

State Withholding (SWH)

A deduction (as from wages, fees, or dividends) levied at a source of income as advance payment on state income tax.

status code

A code indicating the filing status of an employee.

statutory employee

An employee whose earnings are subject to social security and Medicare taxes but not subject to Federal income tax withholding. Common-law employees are generally not considered statutory employees. Refer to the instructions for Form W-2 and/or publication 15-A for more information on statutory employees.

table

(1) A grid that holds records and is visible. (2) An object that stores data.

taxes

Required payments of money to the government.

tax factor prompt

A descriptive prompt that appears during entry of tax factors.

transaction

An exchange between a business and another party, leading to an accounting entry. This entry is recorded in the GL Journal.

transfer agent

An agency or a person that has been contracted to perform the services of paying and reporting tax information to the Internal Revenue Service.

transmitter

The person or organization—the payer or an agent of the payer—submitting magnetic media files to the Internal Revenue Service.

VETS-4212

The VETS-4212 is an annual report required under the Vietnam Era Veterans' Readjustment Assistance Act (VEVRAA) by the U.S. Department of Labor (DOL) Veterans' Employment and Training Service (VETS). Companies with federal contracts or subcontracts are required to keep three years of their VETS-4212 reports in order to fulfill their affirmative action obligations in employing veterans.

wages

Someone who is paid wages receives a pay rate per hour, multiplied by the number of hours worked. This person is considered to be a “non-exempt” employee.

withholding

Money taken out of an employee’s pay check to pay for federal income taxes, federal social security and Medicare taxes, and state and local income taxes. Employees are credited for any excess withholdings made when they file their tax returns.

W-2 form

A statement showing how much an employee earned in wages, tips and other compensation from the previous year. The form reflects state and federal taxes, social security, Medicare wages, and tips withheld. By January 31of each year, all employers are required to provide W-2 forms to all persons employed by them during the previous calendar year.