Abila MIP

Human Resources Management

User's Guide

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Contents

Chapter 1: Introduction

The Abila MIP Human Resources Management module (HR Management) provides increased human resource management and reporting functionality. The module is fully integrated with the Abila MIP Payroll module (Payroll) allowing a single point of entry for critical human resource data. By streamlining these processes, it eliminates double entry of employee information yet the changes made are reflected throughout your entire HR and Payroll system.

Important! The Abila MIP system with the Payroll module must be installed in order to use the HR Management module.

Key features of the module include:

- A central point of entry for employee human resource and payroll data
- Customizable benefit, deduction, and leave calculation options
- Complete employee job history tracking
- Extensive reporting capabilities
- Employee education and certification tracking
- The ability to schedule future employee events
- FMLA reporting
- EEO reporting

Overview

The HR Management module supplements and is used in conjunction with the Payroll module. This module provides an additional set of tools which serves two primary purposes.

1. Human resource management, including extensive employee information, job tracking, salary grades, FMLA tracking, education and certification tracking, performance event tracking, detailed termination data, employee photo, and logging of these changes in Actions.
2. Payroll processing, including wages, benefit, deduction, and leave accrual calculations.

The human resource management information is used for internal decision making and external reporting.

The wage, benefit, deduction, and leave information is used to create default timesheets in the Payroll module. The default timesheets are then used within the Payroll module to calculate and print payroll checks.

In order to calculate and print a payroll check, you must have a regular or default timesheet. The HR Management module facilitates the creation of a default timesheet for each employee. The default timesheet may then be used to create a regular timesheet or to calculate a payroll without modification.

Open Organization

Access this form using Start>Programs>Abila>HR Management.

Use this form to open the HR Management module.

Note: If this is your first time logging on, see the *HR Management Installation Guide* for initial user name and password.

Fields

User Information:

- **User:** Enter your User ID. This is the same user ID you use to sign in to Abila MIP.
- **Password:** Enter your password. This is the same password you use to sign in to Abila MIP.

Select an Organization: Specify the organization name you want to open. By default, the system displays the name of the last Abila MIP organization database opened.

Close Organization

Close the application by using File>Exit or Close.

Use this menu selection to close the Human Resource Management module and all related processes and forms.

Chapter 2: Tasks

Use HR Management to perform several tasks related to benefit plans, job codes, user security, importing and processing timesheets, and running a query.

How Do I Process Payroll?

Once payroll information has been set up, you are ready to process payroll; in other words, you are prepared to print reports, calculate a payroll, print checks, and transfer payroll data to the Accounting system. In order to do this efficiently, follow the steps outlined in this checklist.

1. Email reminder to all employees and managers to have their time entered and approved.
2. Review/Edit Web Timesheets: **HR>Activities>Timesheet Processing>Edit Web/Imported Timesheets**.
   - Make corrections or notify mangers/employees to make corrections.
3. Run timesheet report: **HR>Reports>Web Timesheets**.
   - Set the dates for the pay period and review for complete Timesheets.
4. Update Benefits: **HR>Activities>Benefit Calc Wizard**.
   - Enter the last day of the pay period as the Benefit Calculation Date.
5. Update Leave: **HR>Activities>Leave Calc Wizard**.
   - Enter the last day of the pay period as the Date used to calculate months employed.
6. Load timesheets: **HR>Activities>Timesheet Processing>Edit Regular/Supplemental Timesheets**.
   - Select the Processing group(s) and pay date(s).
7. Edit Timesheets: **HR>Activities>Timesheet Processing>Edit Regular/Supplemental Timesheets**.
   - Verify that the time is correct and make any necessary corrections or adjustments for the pay period.
8. Manually calculate OT if applicable*
   - Use the OT toolbar button in the timesheet after selecting the **Show>OT** check box at the bottom of the form. *Skip this step if OT is calculated during time entry in EWS.
9. Calculate payroll: **Payroll>Activities>Calculate Payroll**.
10. Review calculated payroll: **Activities>Review/Modify Calculated Payroll**.

- To view a printout of the calculated payroll register, use the **Reports>Processing>Quick Calculated Check Register** form.

11. Correct and recalculate timesheets as necessary.
12. Backup the organization data files: **Payroll>File>Backup**.
13. Print the payroll checks and direct deposit vouchers: **Payroll>Activities>Print Checks/Vouchers**.
14. Print the payroll's check or voucher register: **Payroll>Reports>History>Quick Check/Transaction Register.**
    - Review and file
15. If appropriate for the organization, create a Direct Deposit File: **Payroll>Reports>Processing>Voucher Register.**
16. Print the Pre-Transfer Register: **Activities>Transfer to Accounting>Pre-Transfer** button.
17. Transfer the payroll data to the Accounting system: **Payroll>Activities>Transfer to Accounting**.
18. Post transactions in the Accounting system: **Accounting>Activities>Manage Sessions>Post Transaction**.

Calculate Garnishments

Access this form using Activities>Calculate Garnishments. It is only available if the Human Resource Management module is installed.

Use this form to calculate garnished wages from employee payroll checks. This form calculates the employee's disposable income and applies the garnishment to that employee's pay check. This form also displays the gross earnings and taxes. It includes all the details needed to calculate the net pay.

Before calculating garnishments, you must:

- Set up the garnishment deduction in the Payroll and Human Resource Management modules, see Setting Up Garnishment Deductions for steps to setting up the garnishment.
- Enter Default or Regular/Supplemental Timesheets. (Do not add the garnishment to the employee's Timesheet. You must enter garnishments on the Details>Employee Information - Garnishments tab in the Human Resource Management module.)
- Calculate Payroll

- Select Calculate Garnishments to calculate the garnishment amounts. Click Update to apply the garnishments information to the current calculated payroll.
- Review and modify the calculated payroll before printing the checks and payroll vouchers.

Fields

Employee ID: The employee ID.

Name: The employee's first and last name.

Processing Group: This is the processing group code entered on the Payroll module>Maintain>Employee Information>Job and Pay tab. The report shows the code's name, such as Admin or PartTime.

Priority: The order of the garnishment's priority from first to last. The order was entered on the HR module>Details>Employee Info>Garnishments tab.

Garnishment Type: This the garnishment type entered on the HR module>HR Codes>Garnishment Types HR Codes form.

Deduct Code: This is the deduction code selected on the HR module>Details>Employee Info>Garnishments tab and set up using the Payroll module>Maintain>Deduction Codes form.

Adjustment Amount: This is the garnished amount for this line item and will be applied to the employee's paycheck. To view or modify the formula used to calculate adjustment amount, click the Garnishment Calc button.

Garnishment Rate: If Percent of Pay check box was selected, the percentage entered for the garnishment displays.

Garnishment Amount: The amount entered for the garnishment displays.

Running Total: If the employee has more than one garnishment, the garnishment are set up in order by priority. Each row will be added to the previous garnished amount for that employee making a running total amount.

Disposable Income: The disposable income which is calculated by taking the grossing earnings less taxes. To view or modify the formula used to calculate disposable income, click the Disposable Income button.

Gross Earnings: The gross earnings for the employee.

Federal Tax: The total of all calculated federal taxes for this employee displays. These taxes were selected for the employee using Payroll>Maintain>Employee Information>Federal Taxes and calculated when the "Calculate Payroll" was selected.

State Tax: The total of all calculated state taxes displays.

Social Security Tax: The total of all calculated social security taxes displays.

Medicare Tax: The total of all medicare taxes displays.

Local Tax: The total of all other taxes displays.

Retirement: The total of all retirement codes display. Retirement codes were assigned using the Human Resources module>Details>Garnishments tab for the employee.

Health: The total of all health codes display. Health Premium codes were assigned using the Human Resources module>Details>Garnishments tab for the employee.

Net Pay Before Garnishments: This amount is the sum of all of the earnings, deductions, taxes, and so on, that were entered for the employee.

Payroll Type: The payroll type–Adjust, Manual, Regular, Supplemental, or Void.

Error: If an error occurs on the table, this field will be checked, as well as the column that contains the error will be colored red.

Buttons

Disposable Income: Click this button to modify how to calculate the disposable income. Opens formula builder to be able to select any garnishment information available to build your own calculation. If any syntax error or invalid character is in calculation, the area below checks the code for errors and will not let you save the calculation. Use the function screen to view all available characters. The results display in the Disposable Income column. Below is a calculation example based on the Federal Standards.

```
[GrossEarnings]-([FedTax]+[StateTax]+[SSTax]+[MCTax]+[LocTax]+[Retirement]+
[Health])
```

Garnishment Calc: Click this button to modify how to calculate the garnishment. Opens formula builder to be able to select any garnishment information available to build your own calculation (Issued by the Court Order). Again if any syntax error or invalid characters is entered in the calculation, there is an imbedded code checker. Below is a calculation example.

```
if([GarnishmentType]='Family',[Amount],if(if([RunningTotal]<
([DisposableIncome]*.25),[Amount],
([DisposableIncome]*.25)-[RunningTotal]+[Amount])<0,0,if([RunningTotal]<
([DisposableIncome]*.25),[Amount],
([DisposableIncome]*.25)-[RunningTotal]+[Amount])))
```

Tips:

- If the row does not immediately recalculate, you might want to open and close the form. Or just tab out of the cell.
- Use the Reports>Deductions History form to print the historical data entered on the garnishment deduction codes.

Setting Up Garnishment Deductions

Using Abila MIP

Complete the following steps to Set Up Garnishment Deductions in the System:

1. In the Payroll module, open the Deduction Codes form using Maintain>Deductions Codes.
2. Create a deduction code for a Garnishment. Enter a new Code, Title, and select a Liability Account.
3. On the Calculation Tab, select Amount on Timesheet and enter the Maximum per Year amount.
4. The Earnings Tab is not available.
5. On the Schedule Tab, set up the Pay Cycle Frequency.
6. On the Taxes Tab, do not select any taxes for the garnishment deduction.
7. Click the Save button and close the form.

Using HR Management

Complete the following steps to Set Up Garnishment Deductions on the Employee Timesheet:

1. In the HR Management module, open the Employee Information form using Detail Info>Employee Information.
2. Select an employee and select the Garnishments tab.
3. Select a Garnishment Type. These were created using HR Codes>Garnishment Types.

4. Enter the court order date in the Date Order column, even if the date is in the future.
5. Select a Deduction Code. These were created using Payroll>Maintain>Deduction Codes.
6. Enter the Percentage or flat Amount:
   - If it is a Percentage, select the % of Pay check box and enter the Percent.
   - If it is a flat dollar amount, enter the Amount.
7. Enter the applicable Creditor and Contact information.
8. If applicable, enter the Vendor, Health Premium Code, Retirement Code, and/or Notes.
9. Click the Save button.

How Do I Set Up HR Notifications?

Complete the following step to Set Up HR Notifications.

Maintain>Code Table

Create the HR Process Code names.

1. Using the Maintain>Code Table form, select **HR Process Names** from the drop-down list.
2. Create the HR Process name, title and verify the Active status.
3. Click Save, OK, and Close.

Maintain>HR Processes

Setting up the new HR Processing Codes

1. On an *Open row, select the Process Name from the drop-down list.
   a. Enter a Process Type, Title, and select the boxes for the Tasks associated to this process.
2. Next, click the + to add detailed tasks for each Process. You may need to repeat this step if multiple tasks are needed to complete this Process.
   a. Using the Order, enter the Task, Title, and Description information for each task. The Title field is the subject line of the email notification. The Description field is the body of the email text. See "How Do I

Use Field Labels?" (page 29) to create generic templates that can become personalized and meaningful content. This field contains multiple lines.

b. Assign Process Group, Location, and Department if the tasks are different between groups.

c. Select the Required check box, if applicable.

d. Select the Web Approval check box, if you want the HR Approver, Manager, Supervisor, or Other approver to be notified and have access to the task in Approve HR Processes in EWS

e. Select the HR person, manager, or supervisor, and/or Other Approval check box if you want the people with these roles access in EWS.

f. Select the Send Email check box when using HR Notifications. The box must be checked if you want notifications to be sent.

g. Enter the email recipient information. Below are the different ways you can enter the email recipient information.

   i. Email address - Enter an email address to ensure that the task always goes to a specific person, such as your IT groups to set up a computer for a new employee.

   ii. Blank - Leave the email recipient field blank to send the task notice only to the employee to whom it is assigned. Be sure to complete the employee's email address information, see Details>Employee Info section below.

   iii. <Assigned> - Enter <Assigned> to send the task notice to the HR person, manger, supervisor, or other employees who were selected for approvals. Be sure to complete the selected employee's email address information, see Details>Employee Info section below.

   iv. Multiple emails - To send the task to multiple people, you will need to enter all of the email addresses and use a semicolon (;) between each one.

   v. You cannot combine a Blank and an <Assigned> in the email recipient information. You must create two tasks - one for the employee (Blank) and one for the Manager/Supervisor (<Assigned>).

h. Ensure the Status is set to Active.

3. Click Save, OK, and Close.

Note: If using HR Notifications, the Task's title will be used as the subject line in your email notifications. Also, the Task's description will be used as the body of the email. See Field Labels to create generic templates that can become personalized and meaningful content.

Options>Setting>System Preferences

Enter the HR Contact Email address, it is required if you plan to email HR Notifications.

1. On the System Settings form, you must enter an HR Contact Email address. This is the From Email address for all HR Notifications.
2. Click OK.

Details>Employee Info

Before assigning a task to an employee, be sure that all employees have valid email addresses and that Managers and Supervisors are assigned.

1. On the Address & Phone Tab, enter a valid email address for all new and existing employees, especially those that hold Manager, Supervisor, and Secondary Supervisor positions.
2. On the Current Job Tab, select a Manager, Supervisor, and Secondary Supervisor for all new and existing employees.
3. On the HR Processes Tab, click the Assign Process button and select the process from the drop-down list.
   For each process:
   a. Review the Tasks in the process. Assign employees that are assigned to each task. Note, you can assign just one, or all positions.
   b. Add or delete tasks per employee, as needed.
   c. Click Add button to assign tasks to employee.

      Note: You can only assign one Process Type ID and Task ID, per Employee, per day. If you need to assign another task with the same Type ID or Task ID, change the date by one day for the additional task.

   d. Click the Save button to save your changes and assign the task.
   e. When the task is assigned, the notification will be created.

Important! If you delete any Assigned Processes from an employee's record, you will need to manually delete them from the Notifications Log. Otherwise, if using HR Notifications, the emails will get sent.

f. Click Close.

Activities>Notifications Log

To review the HR Notifications, click Activities>Notifications Log.

1. Review the Subject and Message Text fields, as well as the To addresses information.
2. The Subject and Message Text fields can be edited, if the notification has not been sent.

   Note: If Field Labels were used in the original HR Processes setup, you cannot enter/edit them here. You will need to edit the information in the HR Processes Setup, and delete incorrect notifications.

3. If the notification has already been sent, you can edit the subject and message but you will need to un-check the Email Sent check box so that it can be resent.

   Important! If you delete any Assigned Processes from an employee's record (Detail>Employee Info>HR Processes), you will need to manually delete them from the Notifications Log. Otherwise, if using HR Notifications, the emails will get sent.

4. Click OK to save your changes and to close the form. If using HR Notifications, all unsent messages will be sent within the next email interval.

Starting HR Notifications

See the Human Resources Management Installation Guide for instructions for installing and running the HR Notifications module.

Chapter 3: Maintain

Use the Maintain forms to set up benefit and leave plans, as well as job codes, salary grades, and cost center information. Here you will need to set up user security and employee timesheet settings.

Benefit Plans

The Benefit Plans form contains the Benefit Plans - General and Benefit Plans - Rate Table tabs.

Benefit Plans - General Tab

Access this tab using Maintain>Benefit Plans or Benefit Plans 

Use this form to create or modify an existing benefit plan and to create a rate table for these plans. You can set up any of the following types of benefit plans: health, dental, vision, retirement, life insurance, and others. Use this tab to include effective and expiration dates for the benefit plans.

Note: For benefits and deductions to be available in HR Management, the identical code must be first set up as a benefit code or a deduction code in the Payroll module and have a calculation method of *Amount on Timesheet* or *Percentage on Timesheet*.

Fields

Benefit Code: Select a benefit or deduction code from the drop-down list and its description displays. (Edit the description of the Benefit Plan, if necessary.)

Status: Specify the status of the benefit plan. When creating a new benefit plan accept the default status, A (Active), or select I (Inactive) from the drop-down list. The status can be changed at any time. Below are valid status entries and their descriptions:

- **Active** - An active status allows payroll to be processed using this code.
- **Inactive** - Set a code to inactive when it is not being used regularly for payroll, but it could be used at some point. A warning message appears when attempting to use an inactive code. The warning message is for notification only; the code can still be used in the payroll process.

Benefit Type: Select the type of benefit plan, such as Health Insurance, Life Insurance, AD&D, or Vision.

Percent of Earnings on Timesheet: Select this check box to have the system calculate earnings based on a percentage entered on the employee's timesheet. By default, this box is automatically selected when the Benefit Code's **Calculation Method** is **Percent on Timesheet** in the Payroll module. Use this calculation method to pay employees different pay rates based on jobs performed or if you have paid shift differentials, such as different rates if they work the "graveyard" shift.

Payroll Timesheet

- **Effective:** Enter the date the plan goes into effect. Note that you can set up benefit plans for open enrollment prior to their effective dates.
- **Expiration:** Enter the date the plan expires.

Contribution to Cobra: Select this check box for contribution to COBRA, if applicable.

Use Plan Options: Select this check box to set up different options for premiums. You can use plan options and an additional five columns for customizing fields for use with determining eligibility requirements for benefit plans. (This adds fields to the Benefit Plans - Rate Table Tab. For an example of what you would enter, see Using Benefit Plan Options Example.

- **Column Title 1 - 5:** Enter a column title. This title displays in a column on the Rate Table tab.
- **Column Opt 1 - 5:** Select "Up to and including" or "Exact Match" from the drop-down list.
- **Column Value 1 - 5:** Enter in code values.

Tip:

Once you have assigned all employees the appropriate benefit plan codes, complete the following steps to calculate the plans for all employees at once:

1. Select **Activities>Benefit Calc Wizard** or click **Update Benefits** .
2. Enter the dates which determine the detail data included in the report.
3. Click the **Calculate** button.

Benefit Plans - Rate Table Tab

Access this tab using Maintain>Benefit Plans or Benefit Plans

Use this tab to create a rate table used for the Benefit Plans. Set up the columns and formulas on the General tab. You will need to select the Use Plan Options check box to apply the rates created on this tab.

Fields

Row Nbr: This is the order the system will use to determine employee rates. This number will automatically increment for each row.

Plan Option: This column displays if the Use Plan Options check box is selected on the General tab. Plan Options can be modified using Maintain>HR Codes with the *Other Plan Options* selected from the drop-down list.

{Custom Columns}: A custom column displays when a Column Title is entered on the General tab. For more information, see Using Benefit Plan Options Example below.

Premium: Enter the monthly premium amount for the plan options and other criteria that you have selected. If you have set up custom options on the General tab, a column displays for each option on the Rate Table. Enter the appropriate criteria for each custom option.

Contribution Calculation: Enter the employee's monthly contribution amount. This can be a flat fee, a calculated field, or a percentage of the premium amount. See the example below for a typical contribution calculation.

If the Premium amount is $258.10 and the employee's contribution amount is 45% of the premium, you would need to enter the following:

- In the Premium column, enter *258.10*
- In the Contribution Calculation column, enter *sPremiumCalc * .45*

This will calculate the employee's contribution as 258.10*.45=116.15 on the timesheet.

Tips:

- The Column Titles entered on the General tab display between the Plan Option and Premium columns.
- Once you have assigned all of your employees the appropriate benefit plan codes, complete the following steps to calculate the plans for all employees at once:

1. Select **Activities>Benefit Calc Wizard** or click **Update Benefits** .
2. Enter the dates which determine the detail data included in the report.
3. Click the **Calculate** button.

Using Benefit Plan Options Example

Below is an example to calculate the difference between today's date and the employee's birthday if you have selected the Using the Plan Options check box on the Maintain>Benefit Plans or Benefits Plans General Tab ,

Column Title 1: Enter *Age*. This title displays in a column on the Rate Table tab.

Column Opt 1: Select *Up to and Including*.

Column Value 1: Enter *DateDiff(YY, dtmBirthday, GetDate())*. This represents the difference between today and the employee's birthday.

Additional Column Value Examples:

- Calculate Age in Years to today - DateDiff(MM, dtmBirthday, GetDate())/12
- Calculate Age in Years to this year - DateDiff(YY, dtmBirthday, GetDate())
- Calculate Age in Years to this fiscal year end - DateDiff(YY, dtmBirthday, '06/30/2009')
- Contribution Rate by Employee Type $450 for RPT and $225 for RFT - CASE WHEN sEmpType = 'RPT' THEN 450 WHEN sEmpType = 'RFT' THEN 225 ELSE 0 END
- Calculate ceilings for Life Insurance when the annual salary is over $200,000 and your life insurance max is $200,000 - CASE WHEN curAnnual > 200000 THEN 200000 / 1000 * .35 ELSE ceiling(curAnnual / 1000) * .35 END

Leave Plans

The Leave Plans page contains the General and SQL Script tabs.

Leave Plans - General Tab

Access this tab using Maintain>Leave Plans or Leave Plans  .

Use this form to set up and customize leave plans.

Use this tab to create and assign leave plan information. Once you have assigned all employees the appropriate leave codes, you can calculate the leave for all employees at once.

Note: If you have a need for a more complex leave plan, we strongly recommend that you consult your Abila Authorized Business Partner. If you do not have a relationship with an Abila Authorized Business Partner, please contact the Abila Professional Services.

Fields

Leave Code: Select a leave code from the drop-down list and its description displays. (Edit the description of the Leave Code if necessary.) The Calculation Method of AT (Amount on Timesheet) or PT (Percentage on Timesheet) displays between the Leave Code and the Description fields.

Note: Leave Plans can be customized here, however, first they must be set up as Leave Codes in the Payroll module using Maintain>Leave Codes and have the calculation method of "Amount on Timesheet" or "Percentage on Timesheet" selected.

Status: Specify the status of the leave code. When creating a new code accept the default status, A (Active), or select I (Inactive) from the drop-down list. The status can be changed at any time. Below are valid status entries and their descriptions:

- Active - An active status allows payroll to be processed using this code.
- Inactive - Set a code to inactive when it is not used regularly, but it could be used at some point. A warning message appears when attempting to use an inactive code. The warning message is for notification only; the code can still be used in a payroll process.

Annual Plan Year: Select a plan year label of Calendar, Fiscal, Anniversary, or Annual Carry Over Not Used. (Annual Carry Over Not Used excludes carryover from the calculation.) This field is unavailable if the Leave Code has a calculation method of Percentage on Timesheet.

Leave Calculation Level 1 - 10: Use the following table to define the employee's leave calculation where Hours Earned change based on the After Months employed. This calculation includes an Annual Carry Over balance and a Maximum Accrued Balance. If the leave should not have a maximum enter a large number in the After Months field, such as 999, on the last row of the table.

- **After Months:** Enter the number of months required to qualify for the first tier of leave. The calculation takes effect AFTER the number of months. Note that if the tier starts when the employee has had 12 months of service you will enter 11, meaning that after an employee has completed 11 months of service, they are eligible. However, if no eligibility period exists, enter -1.
- **Hours Earned:** Enter the number of hours earned each pay period. This field is unavailable if the Leave Code has a calculation method of Percentage on Timesheet.
- **Percent of Hours:** Enter the rate earned each pay period. This field is unavailable if the Leave Code has a calculation method of Amount on Timesheet.
- **Annual Carry Over:** Enter the maximum number of hours an employee can annually carry over for the tier. This field is unavailable if the Leave Code has a calculation method of Percentage on Timesheet.
- **Maximum Accrued Balance:** Enter the maximum number of hours an employee is allowed to accrue leave for each tier. This field is unavailable if the Leave Code has a calculation method of Percentage on Timesheet.

Execute Leave Calculation: This is the carry over calculation that would occur on the date that the annual carryover should be calculated. Example: If you have a Biweekly payroll with pay period ending on January 5 and you need to calculate the carry over on 12/31, enter 12/31 in the Calc Date, select the Calculate Carry Over check box, and click the Calculate button to make the adjustment on that date.

- **Calc Date:** Select the calculation date for the leave plan. This is the date the leave calculation is effective.
- **Calculate Carry Over:** Select this check box to calculate how much leave the employee has available, based on the calculation date.
- **Records Calculated:** Displays the number of records calculated based on the number of employees that are assigned to this leave plan. You can assign the leave plan using Details>Employee Info>Leave

- tab.
- **Calculate:** Click this button to calculate the leave.

Tips:

- Once you have assigned all employees the appropriate leave plans, complete the following steps to calculate this leave for all employees that belong to it at once.
  a. On the General tab, set the Calculation Date for the leave plan. (This is the date the leave calculation is effective.)
  b. Click Calculate.
- Once you have assigned employees the appropriate leave plans, complete the following steps to calculate all the leave plans for all employees at once.
  a. Select Activities>Leave Calc Wizard or click Update Leave , if appropriate.
  b. Set the Calculation Date for the leave plan. (This is the date the leave calculation is effective.)
  c. Click Calculate.

Leave Plans - SQL Script Tab

Access this tab using Maintain>Leave Plans or Leave Plans . SQL Scripts are advanced statements and require knowledge of SQL language.

Use this tab to enter SQL Scripts for your Leave Plans. If you have a need for a more complex leave plan, we strongly recommend that you consult your Abila Authorized Business Partner. If you do not have a relationship with an Abila Authorized Business Partner, please contact the Abila Professional Services.

Fields

Record Select Statement: This is the record select statement but this field is no longer available.

Rate Adjustment Statement: Enter the rate adjustment statement using these declared variables: @Carry=Carryover amount, @Max=Maximum accrual amount, @Rate = Hours Earned, @Date = Calc Date, or @Emp = EmployeeID. The variables are case sensitive.

Tips:

- Once you have assigned all employees the appropriate leave plans, complete the following steps to calculate this leave for all employees that belong to it at once:

  a. On the General tab, set the Calculation Date for the leave plan. (This is the date the leave calculation is effective.)

  b. Click Calculate.

- Once you have assigned employees the appropriate leave plans, complete the following steps to calculate all the leave plans for all employees at once:

  a. Select Activities>Leave Calc Wizard or click Update Leave .

  b. Set the Calculation Date for the leave plan. (This is the date the leave calculation is effective.)

  c. Click Calculate

Code Table

Access this form using Maintain>Code Table or HR Codes .

Use this form to maintain **HR Codes** for many different types of classifications. The codes set up here are used in other areas of the application, such as Benefit Plans, Certification, Current Job, and FMLA.

Note: During HR Management setup, you must select the **Code Tables** for **Locations** and **Departments**, create a blank code for each of those code tables and label it **Not Assigned**. Without the blank code, reports cannot run against locations or departments. Additional custom code fields are set up using **Options>Settings>Field Setup**.

Fields

Code Table: Select a code table from the list of default system codes or custom codes available.

Default system codes consist of the following:

Details Tab Location	Code Tables
Personal	• Citizenship • Ethnic Codes
Current Job	• Department • Location • Termination Reason
Job History	Job History Reason Code
Current Pay	Employee Type
Dependents	Relationship Types
Benefit Plans	• AD&D Plan Options • Dental Plan Options • Health Plan Options • Life Plan Options • Other Plan Options • Retirement Plan Options • Vision Plan Options
Garnishments	Garnishment Types
FMLA	• Cobra Coverage Option • FMLA Leave Type • FMLA Reasons • Relationship Types
Education	• Education Degrees • Education Majors
Certification	Credential Type

Details Tab Location	Code Tables
Actions	Action Types (Human Resources)
HR Process Names	HR Process Names
Performance	Performance Review Rating
Job Code Maintenance	• EEO1 Class • EEO4 Class

Details Tab Location: The system displays the code's menu location in the HR Management module.

Code Table: Use this table to set up the choices available in a drop-down list, for the default system code selected above.

- **Code:** Enter a unique code.
- **Title:** Enter a description for the code.
- **Benefit Plan:** This column is only available for **Benefit Plan Codes**.
- **Status:** Select the code status.

Tips:

- The default system codes **EEO1 Class** and **EEO4 Class** have predefined codes based on the predefined level documented by the Federal Government and if altered will disable the HR Management module.
- After new codes are created in the **Code Table**, you will need to close and then reopen the **Details** form  to select these new codes.

Entering Benefit Plan and Non-Benefit Codes

To Enter a Benefit Plan Code

Using **Maintain>Code Table** or **HR Codes** , complete the following steps to create a Benefit Plan code.

1. Open the form using **Maintain>Code Table** or **HR Codes**.
2. Select a Code Table specific for the Benefit Plan Option, such as - AD&D Plan Options, Dental Plan Options, Health Plan Options, Life Plan Options, Other Plan Options, Retirement Plan Options, or Vision Plan Options.
3. Enter a unique plan code.
4. Enter the plan description.
5. Select the benefit plan the code is associated with.
6. Select the code status or accept the default status of Active.

To Enter a Non-Benefit Code

Using **Maintain>Code** Table or **HR Codes** , complete the following steps to create a Non-Benefit code.

1. Open the form using **Maintain>Code Table** or **HR Codes**.
2. Select a Code Table this is not a Benefit Plan Option, such as - Citizenship, Department, Job History Reason Code, Employee Type, or Garnishment Types. For a complete list of default system codes, see Code Table.
3. Enter a unique code.
4. Enter the code description.
5. Select the code status.

Job Codes

Access this form using Maintain>Job Codes or Job Codes .

Use this form to define details about specific jobs, such as **Payroll Status**, **Salary Grade**, and **Job Summary**.

Note: Before you begin, be sure that Salary Grades (**Maintain>Salary Grades**) have been created prior to entering a new job code, if your organization uses them.

To create a new Job Code, you must click the **New** button. Then begin completing detailed information about the job.

Fields

Job Code: Enter a unique but short job title, such as Admin. Next enter the full name/description of the job title, such as Administrative Assistant.

Payroll Status: Select a status of either **Active** or **Inactive**.

Job Start Date: Accept today's date as the default or enter the job's start date.

Supervisor Position: Select this check box if the job requires overseeing other employees.

Salary Grade: Select the **Salary Grade** from the drop-down list. To complete this form, you must select a salary grade. (**Salary Grades** should be set up prior to completing job code information using **Maintain>Salary Grades**.)

Exempt: Select this check box if the job code has an exempt status. The exempt status will be applied to the employee record when you assign the job code, but can be changed at the record level if needed.

EEO 1 Class: Select the **EEO 1 Class** from the drop-down list, if applicable. In order to run EEO reports, you must assign the EEO class here at the job level. (They cannot be assigned at the Employee level because the job level defines the class.)

Overtime: Select this check box if the employee is eligible for paid over time. The overtime eligibility will be applied to the employee record when you assign the job code, but can be changed at the record level if needed.

EEO 4 Class: Select the **EEO 4 Class** from the drop-down list, if applicable. In order to run EEO reports, you must assign the EEO class here at the job level. (They cannot be assigned at the Employee level because the job level defines the class.)

Job Requirements: Enter the job duties by task.

Job Summary: Enter the job summary.

Tips:

- It is important to create a blank job code and title it Not Assigned with a payroll status of **Active**. This will be very important when running reports. If a blank or null value is assigned the report cannot run.
- Set up job codes for every position in your organization. Then you can run a report for job codes that are not filled to find open positions.
  OR
- You can set up one job code such as Administrative Assistant and assign it to multiple employees.

Entering a New Job Code

Before you begin, be sure that Salary Grades (**Maintain>Salary Grades**) have been created prior to entering a new job code, if your organization uses them.

Complete the following steps to enter a new job code using **Maintain>Job Codes** or **Job Codes** .

1. Click on the **New** button to create a new job record.
2. Enter the **Job Code**, such as Admin. Then enter the full job title.
3. Select the **Status**.
4. Enter the **Job Start Date**.
5. Check the box for **Supervisor Position**, if applicable.
6. Select the **Salary Grade**.
7. Check the **Exempt** box, if applicable.
8. Select the **EEO Class**, if applicable. In order to run the EEO reports, you must assign the EEO class at the Job Code level.
9. Check **Overtime** if the position is eligible.
10. Enter **Job Requirements**, if applicable.
11. Enter **Job Summary**, if applicable.
12. Click the **Save** button.

Tips:

- It is important to create a blank job code and title it "Not Assigned" with a payroll status of "Active." This will be very important when running reports. If a blank or null value is assigned, the report cannot run.
- In order to have accurate EEO and VET100 reporting, Gender and Ethnicity must be completed and the Job Code must have an EEO level assigned for all applicable employees.

Salary Grades

Access this form using Maintain>Salary Grades or Salary Grades  .

Use this form to set up salary grades. Enter the Salary Grade, Title, Pay Frequency, Step, Hourly Rate, Salary, and Minimum and Maximum Salaries.

Note: When Salary Grades are used to set up a Job Code, you can run the Salary Grade Exceptions report (Reports>HR>Compensation>Salary Grade Exceptions) to see if an employee's pay scale has moved outside the Salary Grade minimum and maximum salary amounts. For more information, see Job Codes.

Fields

Salary Grade: Enter a unique code for the salary grade.

Title: Enter a salary grade title.

Pay Frequency: Enter a pay frequency of Annual, Biweekly, Monthly, Semimonthly or Weekly.

Step: Enter the pay step, if applicable.

Hourly Rate: Enter the hourly rate.

Salary: Enter the salary amount.

Min Salary: Enter the minimum salary.

Max Salary: Enter the maximum salary.

HR Processes

Access this form using Maintain>HR Processes

Use this tab to create HR process workflows that you can use for new employee orientation, hiring processes, termination, or other human resources processes. The workflows you create can be monitored and assigned to employees using the form in the Details>HR Processes tab. Top-level process categories are created and maintained in the HR Processes Code Table.

Fields

Process type options

Process Name: Select a **Process Name** from the list. The process names are maintained in the **HR Processes Code Table**.

Process Type: Enter a **Process Type** for this task set. This value you enter must be unique. Click the plus sign (**+**) next to the **Process Type** to display the tasks associated with it.

Title: Enter a text title for the process. This title will be used if you print a process report.

New Hire: Select this check box if the process type applies to new hires.

Job Change: Select this check box if the process type applies to a job change.

Pay Change: Select this check box if the process type includes a change in the pay rate.

Request FMLA: Select this check box if the process type includes a request for FMLA leave.

Department Change: Select this check box if the process type includes a departmental change.

Location Change: Select this check box if the process type includes a change in the employee's geographical location.

Termination: Select this check box if the process type applies to employee termination.

Task options

Order: Enter a number that represents the order in which the task should be performed within the process.

Task: Enter a name for the task.

Title: Enter a title for the task. The title can be selected for display in a process report. If using HR Notifications, this title will be used as the Subject in your emails.

Description: Enter a free-form description of the task. This field is limited to 8,000 characters. If using HR Notifications, the description will be used as the Body in your emails. See Field Labels that when used in a generic email message, will become personalized and meaningful content, when sent.

Send Email: Select this check box to enable email notifications for the task.

Assign Process Group: To restrict the task to a single process group, select the group name from the list.

Assign Location: To restrict the task to a single location, select the location name from the list.

Assign Department: To restrict the task to a single department, select the department name from the list.

Required: Select this check box if the task is required. The requirement is displayed when you assign the process to an employee.

Web Approval: Select this check box if the task should be displayed in the approvers' check lists in EWS.

HR Approval: Select this check box if the task requires approval from a Human Resources representative.

Mgr. Approval: Select this check box if the task requires approval from a manager.

Sup. Approval: Select this check box if the task requires approval from a supervisor.

Other Approval: Select this check box if the task requires additional approval.

Send Email: Select the box to enable email notification. If the Send Email check box is not selected, email notifications will not be sent.

Note: The Send Email option can only be used with HR Notifications. HR Notifications must be installed on your SQL Server and the SMTP Email connection must be set up before HR Management can send email notifications. For more information about HR Notifications see the Human Resources Management Installation Guide.

Email Recipient: Enter the email addresses for those people who should be notified when the task is added or updated, based on the **Email Send** selected for the task.

Note: If you specify an approver who is not already designated as a manager or supervisor in HR Management, you must give them management permissions so they can view the **Manager** menu in EWS. Since a non-manager approver has no reporting employees, the **Approve HR Processes** page will be the only management-level page with data that they can view. Instead of this, I recommend moving the HR Processes menu item to the Personnel menu in EWS using the EWS System Settings form on the server. For information about granting management permissions, see User Security and Employee Timesheet Settings.

Status: Select **Active** to make this task available for assignment in the **Details>HR Processes** tab. Select **Inactive** if the task is not currently in use.

How Do I Use Field Labels?

Use these fields in the Task Description of the Maintain>HR Processes form to create a generic email message. When the process is assigned to an Employee, the system will replace these field labels with the information entered in the employee's Detail Info; thus making a meaningful message.

Note that if the field is left blank on the Employee's Detail Information, the system could display an extra large blank space or incomplete information in the message. For example, if the email address is not entered on the Detail Info for the employee, the message would include several extra spaces where the email address should be. Another example, if the work phone is not added in the Detail Info, the message would include "( ) - Ext " where the work phone should be.

Once your HR Processes (have the Send Email option selected) have been assigned to an Employee, you can review your composed message using the Activities>Notifications Log form. In this form, you can edit the Subject and Message Text fields as well as the To Address information. Note that if Field Labels were used in the original HR Processes, you cannot enter them in the Notifications Log. You will need to enter in the information and remove the broken Field Label.

Below are some sample Task Description:

- Hello <First> <Last>, Welcome to the NPS Training Organization.
- Your office phone number is <WorkPh> and your company email address is <Email>.
- Your Department code is <Department>.
- Your supervisor, <Supervisor>, will be able to explain the time punch system.
- Your Manager <Manger> will approve your weekly time punches for payroll.

Below is each Field Label, Description, and location where the information is entered on the Details>Employee Info form.

Field Label	Field Label Description	Field Label Location
<First>	The employee's first name.	Details>Employee Info>Personal
<Middle>	The employee's middle initial.	Details>Employee Info>Personal
<Last>	The employee's last name.	Details>Employee Info>Personal
<Nick>	The employee's nick name.	Details>Employee Info>Personal
<Salutation>	The employee's salutation.	Details>Employee Info>Personal
<Cell>	The employee's cell phone number.	Details>Employee Info>Address & Phone
<WorkPh>	The employee's work phone number.	Details>Employee Info>Address & Phone
<Email>	The employee's email address.	Details>Employee Info>Address & Phone
<Job>	The employee's job title.	Details>Employee Info>Current Job
<eType>	The employee type.	Details>Employee Info>Current Pay
<Location>	The employee's location.	Details>Employee Info>Current Job
<Department>	The employee's	Details>Employee

Field Label	Field Label Description	Field Label Location
	department.	Info>Current Job
<Manager>	The employee's manager.	Details>Employee Info>Current Job
<Supervisor>	The employee's supervisor.	Details>Employee Info>Current Job
<SecSupervisor>	The employee's secondary supervisor.	Details>Employee Info>Current Job
<TermDate>	The employee's termination date.	Details>Employee Info>Termination
<LastDay>	The employee's last worked date.	Details>Employee Info>Termination
<ActionDate>	The employee's action date.	Details>Employee Info>Actions
<Birthday>	The employee's birth date.	Details>Employee Info>Personal
<ProcGroup>	The employee's processing groups.	Details>Employee Info>Current Pay
<TermReason>	The employee's termination reason.	Details>Employee Info>Termination
<TermType>	The employee's termination type.	Details>Employee Info>Termination

User Security

Access this form using Maintain>User Security.

Use this form to assign security levels to HR Management users. HR Management user accounts are created using the Administration>Security>Maintain Users in Abila MIP. You will see *all* Active users for

Abila MIP and HR. Also, all HR users will be added to the Abila MIP system. In order for a HR user to have access to the Abila MIP system, the organization database will need to be added to that user on the Abila MIP>Administration>Security>Maintain Users form.

- Limit a user's access to forms and personal information
- Deny a user's access to all organizations
- New users and password changes should be handled in Abila MIP, however, you can change the Employee ID and reset a password in HR Management. See Options>"Preferences" (page 121) for more information.
- The Admin user account will need to have the same password for HR Management and Abila MIP. If you have any other user names the same in both HR Management and Abila MIP, the system will follow the Abila MIP password credentials, such as, Require a Password, Minimum Password Length.

Note: A user does not have rights in the HR Management module until you select the **Security Level** and have the **Status** of *Active* for all menu selections.

Fields

UserID: The User ID defined in Abila MIP is shown. This is a unique ID that represents the user being added or modified.

User Name: The User Name defined in Abila MIP is displayed.

Security Level: Select a security level which automatically assigns access to the following menu selections: **Details>Employee Info tabs(Personal, Address & Phone, Current Job, Current Pay, Direct Deposit, Earnings, Dependents, Benefit Plans, Benefits, Deductions, Garnishments, Leave, Workers' Compensation, FMLA, Taxes, W2, Education, Certification, Performance Review, Actions, Termination, Attachments, Notes, UDF), Query>Run Query (HR Query), and Activities>Timesheet Processing (Payroll Timesheets)**.

See Security Levels for a description of the access provided in each level.

EmployeeID: Select an employee ID from the drop-down. This is necessary to schedule a **Human Resources Action** date using the calendar feature.

Note: Employee IDs should be limited to alphabetic or numeric characters (A to Z and 0 to 9). Commas and quotes are not permitted, but you should avoid using any symbols in this field since symbols can cause problems when you synchronize the data in HR Management with the data in Abila MIP.

Maintain Codes: Select this check box to assign access to the **Maintain>Code Table** menu item and the **HR Codes Button** located on the form.

Custom Security: This is a customized security field. You should contact your Abila Authorized Business Partner to discuss your custom security needs.

Status: The system displays A (**Active**) or **I (Inactive)**. Users must have an **Active** status in order to access HR Management. When a user is added to Abila MIP>Administration>Security>Maintain Users , the status must be Active and the HR Management check box must be selected in order for that User ID to display in the HR Management system. You must set appropriate access to menus before the user can sign in and use HR Management.

Tips:

- To schedule a **Human Resources Action** date using the calendar feature, be sure that an **Employee ID** is assigned to the user.
- To enable management or HR staff access to EWS functions, you must also set the appropriate options on the Employee Settings tab in **Maintain>Timesheet Setup>Employee Timesheet Settings**.
- All user names are listed in alphabetical order from left to right. You may need to scroll to the right, in order to view all of your users.

Granting User Security

Using **Maintain>User Security**, complete the following steps to grant user security. To create a new user, use the Administration module in Abila MIP.

1. Select a **User ID** from those displayed in the form.
2. Select a **Security Level**. For more information, see Security Levels.
3. Select the **Employee ID**.
4. Customize the access to any tabs or forms for the user.
5. The **Status** reflects the Abila MIP status for the User ID.
6. Click the **Save** button and close the form.

Note: Even if you assign a Security Level and Employee ID to an Inactive User, that person will NOT be allowed to access the HR Management system. They must have an Active status in the Abila MIP system before their security access will work.

Security Levels

Security Levels are defined as the following:

HR Manager:

- Unlimited access to all areas of program.
- Cannot be denied access to any tabs.

HR Staff:

- Access to all areas of the program ***EXCEPT***
  - User Security
  - Mass Update
- Customized access to the following tabs (Full Access/No Access/View Only):
  - Earnings
  - Benefits
  - Benefit Plans
  - Deductions
  - Leave
  - Workers Compensation
  - Direct Deposit
  - Taxes
  - W2
  - Education
  - Certification
  - Actions
  - Attachments

Admin Staff:

Access to ONLY the following areas:

- Employee Details
- Scheduling
- Preferences in the Options menu

Note: This level provides customized access to all tabs (Full Access/No Access/View Only).

Manager:

Access to ONLY the following areas:

- Managers employee details only
- Scheduling
- Preferences in the Options menu

Note: This level provides customized access to all tabs (Full Access/No Access/View Only).

Department:

Access to ONLY the following areas:

- Department employee details only
- Scheduling
- Preferences in the Options menu

Note: This level provides customized access to all tabs (Full Access/No Access/View Only).

View Only:

View access ONLY for the following forms, but make no changes:

- Employee Details
- Scheduling
- HR reporting for Certification, Compensation, Education, Leave, and Personnel in the **Reports>HR** menu
- Preferences in the Options menu

Note: This level provides customized access to all tabs (No Access/View Only).

Security Levels

The following table describes the access provided by each security level available when you modify a user's profile with the **Maintain>User Security** function.

Menu Level 1	Menu Level 2	Menu Level 3	HR Mgr.	HR Staff	Admin. Staff	Mgr.	Dept.	System Admin.	View Only
File	Exit		✓	✓	✓	✓	✓	✓	✓
View			✓	✓	✓	✓	✓	✓	✓
Maintain	Benefit Plans		✓	✓					
	Leave Plans		✓	✓					
	Code Table		✓	✓					
	Job Code		✓	✓					
	Salary Grades		✓	✓					
	Change Employee ID							✓ 1	
	Timesheet Setup	Cost Center Setup	✓						
		Employee Cost Centers	✓						
		Employee Timesheet Settings	✓						
		Timesheet Import Specs	✓						
Details	Employee Info		✓	✓	✓	✓ 2	✓ 3	✓	✓ 4
	Scheduling	Monthly View	✓	✓	✓	✓ 2	✓ 3	✓	✓
Activities	Benefit Calc Wizard		✓	✓					

Menu Level 1	Menu Level 2	Menu Level 3	HR Mgr.	HR Staff	Admin. Staff	Mgr.	Dept.	System Admin.	View Only
	Leave Calc Wizard		✓	✓					
	Open HR Actions		✓	✓					
	Mass Update		✓						
	Timesheet Processing	Edit Web/Imported Timesheets	✓						
		Load Default Timesheets	✓						
		Edit Regular/Supplemental Timesheets	✓						
Reports	HR	Actions	✓	✓					
		Benefit Plans	✓	✓					
		Certification	✓	✓	✓	✓	✓	✓	✓
		Compensation	✓	✓	✓	✓	✓	✓	✓
		Education	✓	✓	✓	✓	✓	✓	✓
		EEO Reports	✓	✓					
		FMLA	✓	✓					
		Leave	✓	✓	✓	✓	✓	✓	✓
		Personnel	✓	✓	✓	✓	✓	✓	✓
		Vet 100	✓	✓					
		Termination	✓	✓					
	Payroll	Timesheets	✓	✓					
		Processing	✓	✓					

Menu Level 1	Menu Level 2	Menu Level 3	HR Mgr.	HR Staff	Admin. Staff	Mgr.	Dept.	System Admin.	View Only
		History	✓	✓					
Query	Run Query								
Options	Preferences		✓	✓	✓	✓	✓	✓	✓
	Settings	Field Setup	✓	✓					
		System Preferences	✓	✓					
Windows	Cascade		✓	✓	✓	✓	✓	✓	✓
	Tile Vertical		✓	✓	✓	✓	✓	✓	✓
	Tile Horizontal		✓	✓	✓	✓	✓	✓	✓
	Close All		✓	✓	✓	✓	✓	✓	✓
	Arrange Icons		✓	✓	✓	✓	✓	✓	✓
Help	Contents		✓	✓	✓	✓	✓	✓	✓
	Index		✓	✓	✓	✓	✓	✓	✓
	What's New		✓	✓	✓	✓	✓	✓	✓
	Activation Wizard							✓ 1	
	About...		✓	✓	✓	✓	✓	✓	✓

1

This task can only be performed by the System Administrator user ID.

[2]Limited to assigned employees.

[3]Limited to employees in department.

[4]View only for all tabs except HR Actions, which is no access.

Change Employee ID

Access this form using Maintain>Change Employee ID. You must have the Details form closed and process or remove any Regular or Supplemental Timesheets using Activities>Timesheet Process>Edit Regular/Supplemental Timesheets.

Use this form to change an existing Employee ID to a new, unique one. Click OK to change the ID and related employee history. This is useful if an employee changed her name through marriage.

Note: You must be an Administrator in HR Management to edit an employee ID.

Fields

Current Employee ID: Select an existing employee ID from the drop-down list.

New Employee ID: Enter a new, unique employee ID. The Check ID button verifies that the New Employee ID does not already exist.

Cost Center Setup

Access this form using Maintain>Timesheets Setup>Cost Center Setup.

Use this form to define the distribution in the Payroll module for employee time entry. When employees enter their time in the timesheets of the Employee Web Services module, they will select which cost center their time is associated with.

Fields

Cost Center: Enter the cost center name.

Use Dist: Select this check box to use a predefined distribution code from the Payroll module.

Distribution Code: Select the distribution code from the drop down list.

{Segment Name}: If you do not select the Use Dist check box, you must enter the appropriate segment code information for the distribution. The system displays one column for each valid segment.

For Earning: Select this check box to make this cost center code available for earnings entry in the Employee Web Services module.

For Leave: Select this check box to make this cost center code available for leave entry in the Employee Web Services module.

For Expense: Select this check box to associate the cost center to an expense. Expense items were created using the Payroll>Maintain>Earning Codes form and select the Earning Code with the Contribute to Net Pay Only check box as well as a Calculation Method of Amount on Timesheet.

Tips:

- In order for a cost center to be eligible for use as an expense, it must use a distribution code.
- Click the Export button to export your cost center information to a *.xls file format.
- Click the Save button to save your cost center information.
- Mileage expense codes MUST start with Mileage in order for the miles field to be available for expense entry in the Employee Web Services module.

Employee Cost Centers

Access this form using Maintain>Timesheets Setup>Employee Cost Centers.

Use this form to select which cost centers each employee is able to use when entering timesheets on the Employee Web Services module.

A table displays all of the employees.

- Click the plus (+) sign next to the Employee ID to expand the outline.
- Select a Cost Center from the drop-down list.
- Then repeat this process for all cost centers that this employee can use for time entry.
- Finally, repeat this process for all employees entering time on the EWS.

Note: Click the **Export** button to display the employee cost center data in a Microsoft Excel spreadsheet.

Fields

This table supports the drill down feature, which allows you to view employees and enter cost center information. You can click the plus (+) sign next to an employee to expand the outline. When an item has been expanded, the plus (+) sign becomes a minus (-) sign. To collapse an item, simply click the minus sign. The following sample shows the three levels of detail:

Level 1–Employee Document (document information related to the Employee ID)

Level 2–Cost Center Document (collects cost center information for the Employee)

Level 1: Employee Document

Employee ID: The Employee IDs entered on the Details>Employee Info form.

Process Group: The employee's processing group code.

First Name: The first name for this employee.

Last Name: The last name for this employee.

Job Code: The employee's job code.

Location: The employee's location.

Department: The employee's department.

Pay Type: The employee's pay type of S (Salary) or H (Hourly).

Emp Type: The employee's exemption type such as Non Exempt or Exempt.

Level 2: Cost Center Document

Cost Center: Select the cost center associated with this employee.

Tips:

- To sort your records, click the Filter  next to the column header.
- Use the group panel (at the top of this form) to reorganize how the form data is displayed. You can drag and drop any column heading to group them by that column heading. To ungroup, drag and drop the column heading back to its original position.

Export

Access this form using the Export button 

, which is found throughout the system.

Use this form to export data to an Excel (*.xls) file type.

Note: You must have Microsoft Excel 2003 (or later) to export Excel (XLS) files.

Fields

Save In: Select the folder where you want to save the exported file.

File name: Either select a file from the list, if appropriate, or enter a file name for the exported data. You can specify which files are included in the list using the Save as type box.

Save as type: Accept the default file type, or select a file type from the drop-down list.

Tip: The currency fields in the exported file follow the formatting set up in your computer's regional settings (Start>Settings>Control Panel>Regional and Language Options).

Employee Timesheet Settings

The Employee Timesheet Settings page contains the Employee Settings, Employee Cost Centers, Employee Earning Rate, and Global Settings tabs.

Employee Timesheet Settings - Employee Settings Tab

Access this tab using Maintain>Timesheets Setup>Employee Timesheet Settings.

Use this form to define the default settings for employees to use for their timesheets using EWS. Use this tab to define default information for each employee. Be sure to complete all pertinent information before moving to the next employee.

Fields

Select Employee: Select the employee from the drop-down list.

Default Earnings Code: Select the default earnings code for the employee's default timesheet. Be sure to verify that the default earning code selected is on the employee's default timesheet (**Activities>Timesheet Processing>Edit Regular/Supplemental Timesheets**).

Default Earnings Cost Center: Select the default earnings cost center for the employee. Cost Centers were created using **Maintain>Timesheets Setup>Cost Center Setup** and must be listed on the **Employee Cost Centers** tab. For more information, see Employee Timesheet Settings - Employee Cost Centers Tab.

Default OT/Comp Wage Code: Select the default overtime/comptime code for the employee's default timesheet. Be sure to verify that the default overtime code selected is on the employee's default timesheet (**Activities>Timesheet Processing>Edit Regular/Supplemental Timesheets**).

Use Cost Center for OT/Comp: Select the default cost center to use for the employee's overtime and comptime. This can be the same or different as the **Default Earnings Cost Center**.

Default Doubletime Code: Select the default double time code for the employee's default timesheet. Be sure to verify that the default overtime code selected is on the employee's default timesheet (**Activities>Timesheet Processing>Edit Regular/Supplemental Timesheets**).

Use Earnings Code for Leave Entry: Select the earnings code for leave entry for the employee's default timesheet. You can leave this field blank, if the employee is an exempt employee.

Default Leave Cost Center: Select the default cost center to use for employee leave. This can be the same or different as the **Default Earnings Cost Center**.

Timesheet Entry Form: Select the form the employee should use for web timesheet entry or leave as **Use Default**. Default timesheets are set in the EWS default settings. For more information, see the EWS online help.

Timesheet Approver: Select an employee who has rights to approve timesheets.

Allow Edit Entries: Select this check box to give this employee the ability to edit time entries when using EWS.

Allow View Entries: Select this check box to give this employee the ability to review time entries when using EWS.

Submit not required: Select this check box if the employee is not required to formally submit a timesheet.

HR Staff: Select this check box to give this employee access to the **HR Staff Menu** when using EWS.

Manager: Select this check box to give this employee access to the **Manager Menu** and approve timesheets when using EWS.

Timesheet Import Specs

Access this form using Maintain>Timesheets Setup>Timesheet Import Specs.

Use this form to set up or modify custom import specification for third-party time clocks, based on flat .csv files. If you have a need for a custom import specifications for third-party time clocks, we strongly recommend that you consult your Abila Authorized Business Partner. If you do not have a relationship with an Abila Authorized Business Partner, please contact the Abila Professional Services.

Fields

Import Spec: Enter the name of your new import specification file.

Import Information

- **Position:** Enter the position of the data (where the data begins).
- **Field Name:** Select a field name from the drop down list.
- **Default Value:** If there is no value in the field, enter a default value.
- **Use Employee Default:** Select this check box if the default employee information should be used instead of the information being imported.
- **Import Field Type:** Select the import field type: string (text), Date, Double (number), or Boolean (yes/no).
- **Length:** Accept the default of zero or enter the length of the field.

Chapter 4: Details

Use the **Details** forms to enter and maintain employee information such as, address and phone, current job details, current pay details, payroll benefits and deductions, performance reviews and training achievements, as well as notes and current photo.

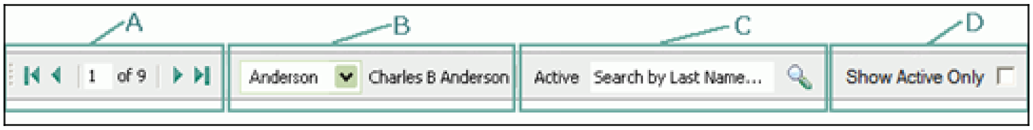
Employee Information Tabs

The following tabs are available on the Employee Info form. Click the link to view detailed information about each tab:

Personal Tab	Benefit Plans Tab	Education Tab
Address & Phone Tab	Benefits Tab	Certification Tab
Current Job Tab	Deductions Tab	Actions Tab
HR Processes	Job History Tab	Garnishments Tab
Performance Tab	Current Pay Tab	Leave Tab
Termination Tab	Direct Deposit Tab	Worker's Compensation Tab
Photo Tab	Earnings Tab	FMLA Tab
Attachments Tab	Dependents Tab	Taxes Tab
Notes Tab	W2/Vouchers Tab	User Defined Field Tab

Tip:

Use the following tool bar to move between your employee records. This is located below the tabs on the Employee Information form.



A - Use the Numbered Record List feature by clicking on the First Record, Previous Record, Next Record, and Last Record buttons to display each employee record in a numerical order:

B - Use the Drop-Down List feature by clicking on the to display a drop-down list of every employee record available for selection. You can Sort or Filter the Employee records; these settings will be retained until the Detail>Employee Info form is closed.

C - Use the Search By Last Name feature by typing in the employee's last name and click the Find Employee button.

D - Select the Show Active Only check box to view only the active employee records.

Employee Info - Personal Tab

Access this tab using Details>Employee Info or Details .

Use this form to enter or change information related specifically to an employee.

Note: Most fields may be edited in the Employee Information section, even if the field comes directly from the Payroll module. The only exception would be that the EmployeeID cannot be changed on this form. However, the EmpoyeeID can be changed using the **Maintain>Change Employee ID** form.

Payroll Users: The EmployeeID, First Middle Last, ID Verification, Drivers License, Birth Date, Marital Status, Gender, Ethnic, Citizenship, and Military Experience fields contain the same information that was entered using the Payroll>Maintain>Employee Information form.

Fields

EmployeeID: Enter a new employee ID. Limit your entry to strictly alphabetic or numeric characters (A through Z, or 0 through 9). Do not use symbols, such as: | " / \ : * ? ; ,< > # [ ] ' %. (Click the drop-down in order to locate a different employee ID.)

Note: The **First** and **Last Name** and **Social Security Number** (located on the **Taxes** tab) fields are not required; however, these fields are needed when processing the employee's timesheet in the Payroll module.

First Middle Last: Enter the first name, middle initial, and last name for the employee. A middle initial is not required.

Nick Name: Enter a descriptive name given in addition to the official name of record.

Salutation: Enter a greeting or salutation, such as Sir, Madame, or Doctor Dave Aaron III. It is not necessary to enter the "Dear" or "To Whom It May Concern" greeting here.

I9 Verification, I9 Verification Date: Select this check box if I9 verification is complete, and then enter the I9 verification date or accept today as the default date.

Drivers License

- **Number:** Enter the driver's license number of the employee.
- **Class:** Enter a vehicle class, such as C or A.
- **State:** Enter the state where the license was issued.
- **Expires:** Enter the date when the license expires.
- **Auto Insurance Expirations:** Enter the date when the employee's automobile insurance expires.

Birth Date: Enter the employee's date of birth.

Age: The system automatically calculates the employee's age.

Marital Status: Enter the employee's marital status, such as single, married, divorced, or widowed.

Gender: Enter a gender of male or female.

Hispanic: Select this check box if the employee is Hispanic.

Ethnic: Select an ethnicity from the drop-down list. This must be selected in order to run EEO reporting. **Ethnic** was set up using **Maintain>Code Table** and selecting **Ethnic Codes** from the drop-down list.

Citizenship: Enter the country in which the employee is a citizen. **Citizenship** was set up using **Maintain>Code Table** and selecting **Citizenship** from the drop-down list.

Smoker: Select this check box if the employee is a smoker, and the organization is required to report on this information.

Disability: Select this check box if the employee has a disability, and the organization is required to report on this information.

Disabled Vet: Select this check box if the employee is a special disabled veteran, and the organization is required to submit a Veteran's Employment Report to the U.S. Department of Labor.

Vietnam Vet: Select this check box if the employee is a veteran of the Vietnam era, and the organization is required to submit a Veteran's Employment Report to the U.S. Department of Labor.

Recent Vet: Select this check box if the employee is a recently separated veteran, and the organization is required to submit a Veteran's Employment Report to the U.S. Department of Labor.

Medal Vet: Select this check box if the employee participated in a United States military operation for which a Service Medal was awarded, and the organization is required to submit a Veteran's Employment Report to the U.S. Department of Labor.

Protected Vet: Select this check box if the employee is another protected veteran, and the organization is required to submit a Veteran's Employment Report to the U.S. Department of Labor.

Military Experience: Enter a military status, such as active, retired, or none.

Tips:

- Employee IDs should be limited alphabetic or numeric characters (A to Z and 0 to 9). Commas and quotes are not permitted, but you should avoid using any symbols in this field since symbols can cause problems when you synchronize the data in with the data in .
- In order to have accurate EEO and VET100 reporting, **Gender** and **Ethnicity** must be completed and the **Job Code** must have an EEO level assigned for all applicable employees.
- To change the Employee ID, use the **Maintain>Change Employee** ID form.
- If the Payroll module **Citizenship** field contains **US**, you may get an error. Be sure to add **US** in the drop-down list selection in the HR Management module using **Maintain>Code Table** and selecting **Citizenship** from the drop-down list.

Employee Info - Address & Phone Tab

Access this tab using Details>Employee Info or Details .

Use this tab to enter or update the address and emergency contact information for an employee.

Payroll Users: The Address, City, State, Zip, Home Phone, Fax, Work Phone, and 1st Contact fields contain the same information that was entered using the Payroll>Maintain>Employee Information form.

Fields

Address: Enter the employee's home address.

City, State, Zip: Enter the employee's city, state, zip code and country.

Home Phone: Enter the employee's home telephone number.

Fax: Enter the employee's fax number.

Cell Phone: Enter the employee's cell phone number.

Work Phone: Enter the employee's work phone number.

Email Address: Enter the employee's work email address. This must be entered in a typical email format including an @ and a "." Example, you@email.com

Home Email Address: Enter the employee’s home email. This must be entered in a typical email format including an @ and a "." Example, you@email.com

Emergency Contacts: Enter up to three emergency contacts for the employee, including the following information:

- **Name:** Enter the contact’s name.
- **Phone:** Enter the contact’s phone number.
- **Relation:** Enter the contact’s relationship to the employee.
- **Email Address:** Enter the contact’s email address. This must be entered in a typical email format including an @ and a "." Example, you@email.com

Employee Info - Current Job Tab

Access this tab using Details>Employee Info or Details .

Use this tab to enter and edit job information for an employee.

Note: If you are changing an employee's job title, job code, exempt status, overtime eligibility, salary grade, location, or department in order to create a **Job History** record with the correct pay history: Verify the **Job Title**, **Job Code**, **Exempt** status, **Overtime Eligibility**, **Salary Grade**, **Location**, and **Department** and on the **Current Pay** tab, modify the **Processing Group**, **Pay Effective Date**, **Hourly Rate**, **Pay Period Hours**, **FTE Rate**, and **Annual Salary**, before clicking **Save**.

Payroll Users: When you open HR for the first time, the Job Start Date, Original Hire date, Last Hire Date, Seniority Date, Vacation Date, Actions Date, Class, and Position fields contain the same information that was entered using the Payroll>Maintain>Employee Information form. The Last Hire Date is the same date entered in the "Dates: Hired" and the Actions Date is the same date entered in the "Dates: Action" using the Payroll>Maintain>Employee Information>Employee tab.

Fields

Job Title: Select the employee's job title. You **must** have a **Job Title**, even if it is **Not Assigned**. This is required for accurate EEO reporting.

Job Code: The Job Code displays and cannot be changed here. This was created using **Maintain>Job Codes**.

Salary Grade: The salary grade displays and cannot be changed here. This was created using **Maintain>Salary Grades** and assigned using **Maintain>Job Codes**.

Exempt: Specifies whether the employee has **Exempt** status. The **Exempt** check box will be checked by default if the **Job Code** you assigned to the employee has the **Exempt** option set. You can select or clear the check box as needed to indicate whether the job is exempt.

Overtime Eligible: An employee is **Overtime Eligible** if their job is eligible for overtime pay. The **Overtime Eligible** check box will be checked by default if the **Job Code** you assigned to the employee has the **Overtime** option set. You can select or clear the check box as needed to indicate whether the employee should receive overtime pay.

Job Start Date: Enter the date the employee started this job or click the drop-down list to open the **Calendar**. The system automatically displays the number of months and years the employee has completed. This could be different from the **Original Hire Date**. Note that future dates are not recommended.

Original Hire Date: Enter the hire date for this employee or click the drop-down list to open the **Calendar**. Note that future dates are not recommended.

Last Hire Date: Enter the hire date for this employee or click the drop-down list to open the **Calendar**. The system automatically displays the number of months and years the employee has completed. Note that future dates are not recommended.

Seniority Date: Enter the seniority date for this employee or click the drop-down list to open the **Calendar**. The system automatically displays the number of months and years the employee has completed. Note that future dates are not recommended.

Vacation Date: Enter the date the employee can start accruing vacation time or click the drop-down list to open the **Calendar**. This date is also used to calculate leave eligibility. The system automatically displays the number of months and years the employee has completed. Note that future dates are not recommended.

Actions Date: Enter the action date for this employee or click the drop-down list to open the **Calendar**.

Location: Select the employee's location. **Location** was set up using **Maintain>Code Table** and with **Location** selected from the drop-down list. When you set up the locations, you must create a blank location code and title it **Not Assigned** with a status of **Active**.

> **Important!** If a blank or null location code is not created, reports that include the location cannot run.

Department: Select the employee's department. **Department** was set up using **Maintain>Code Table** and with **Department** selected from the drop-down list. When you set up the departments, you must create a blank department code and title it **Not Assigned** with a status of **Active**.

> **Important!** If a blank or null department code is not created, reports that include the department cannot run.

Manager: Select the employee's manager.

Supervisor: Select the employee's supervisor.

Secondary Supervisor: Select the employee's secondary supervisor.

Class: Enter the job or employee class. This class is originally created in the Payroll module. To have the field populated automatically, select **Department**, **Location**, or **Supervisor** from the drop-down list in the **Map Class** field using **Options>Settings>System Preferences**.

Position: Enter the position. This class is originally created in the Payroll module. To have the field populated automatically, select **Job Code** or **Job Title** from the drop-down list in the **Map Position** field using **Options>Settings>System Preferences**.

Recruiter: Enter the recruiter's name.

Hire Source: Enter the hire source.

Tips:

- The date fields give an estimate of the number of years/months employed. The system looks at the difference in months to determine this number, not the days. So, if you are employed November 30 and the system date is December 1, the system displays one month employed.\
- Some changes to this page will cause a prompt to create a Job History records for the previous job. For example, if you change the Exempt status or Overtime Eligible selections, you will be prompted to create Job History record. Select Yes to create a history record or No to leave the job history unchanged.

Employee Info - Job History Tab

Access this tab using Details>Employee Info or Details .

Use this tab to display the history of the employee's job information, track the progression of time with the company, and review and/or edit any record.

Fields

History Date: The effective date of the job.

Reason Code: The job history reason code, such as **Merit** (merit increase), **Prom** (job promotion), and **Term** (termination). **Reason Code** was set up using **Maintain>Code Table** and with **Job History Reason Code** selected from the drop-down list.

Job Start Date, Job Code, Job Title: The job start date, code, and title.

Exempt: Displays a checked box when Employee has an Exempt status on the Current Job tab. Otherwise, an un-checked box displays.

OverTime: Displays a checked box when the employee Overtime Eligible selected on the Current Job tab. Otherwise, an un-checked box displays.

Process Group: The processing group associated with the job.

Pay Type: The pay type of **Hourly** or **Salary**.

Emp Type: The employee type code, such as **RFT** (Regular Full Time) or **RPT** (Regular Part Time). **Employee Type** was set up using **Maintain>Code Table** and with ***Employee Type Code*** selected from the drop-down list.

Pay Effective: The pay effective date of the job.

Pay Period Salary: The salary amount for this pay period for salaried employees.

Hourly Rate: The hourly rate entered on the **Current Pay** tab.

Annual Salary: The annual salary amount for the employee entered on the **Current Pay** tab.

FTE: The **FTE Rate** entered on the **Current Pay** tab.

Norm Hours: The normal hours worked in a pay period.

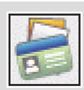
Location, Department: The job history location and department.

Manager: The job history manager.

Supervisor, Sec Supervisor: The job history supervisor and second supervisor.

Note: Any notes entered for the job history.

Employee Info - Current Pay Tab

Access this tab using Details>Employee Info or Details .

Use this tab to set up the employee's current pay information.

Note: If you are changing an employee's processing group, pay effective date, hourly rate, pay period hours, FTE rate, or annual salary, in order to create a **Job History** record with the correct pay history: Verify the **Processing Group**, **Pay Effective Date**, **Hourly Rate**, **Pay Period Hours**, **FTE Rate**, and **Annual Salary** and on the **Current Job** tab, modify the **Job Title**, **Job Code**, **Salary Grade**, **Location**, and **Department**, before clicking **Save**.

Payroll Users: The Processing Groups, Salary/Hourly, Hourly Rate, Payroll Status, Pay Frequence, and the Direct Deposit fields contain the same information that was entered using the Payroll>Maintain>Employee Information form.

Fields

Processing Groups: Select the processing group from the drop-down list. **Processing Groups** were created in the Payroll module using **Maintain>Processing Groups**.

Pay Effective Date: Enter the pay effective date.

Salary/Hourly: Select hourly or salary.

Hourly Rate: Enter the hourly rate. Once this field is populated, **Pay Period Salary** and **Annual Salary** will automatically be calculated.

Pay Period Salary: Enter the pay period salary. Once this field is populated, **Hourly Rate** and **Annual Salary** will automatically be calculated.

Pay Period Hours: Enter the pay period hours. Once this field is populated, **FTE Rate** will automatically be calculated.

FTE Rate: Enter the FTE rate. Once this field is populated, **Pay Period Hours** will automatically be calculated.

Annual Salary: Enter the annual salary. Once this field is populated, **Hourly Rate** and **Pay Period Salary** will automatically be calculated.

Next Pay Review: Enter the next pay review date. Use the **Actions** tab to schedule **Pay Reviews**. For more information, see Employee Info - Actions Tab.

Payroll Status: Select the payroll status, such as **Active**, **Inactive**, or **Terminated**.

Employee Type: Select the employee type, such as **RFT** (Regular Full Time) or **RPT** (Regular Part Time). This code was created using **Maintain>Code Table>Employee Type Code**.

Pay Frequence: The pay frequency is automatically determined by the processing group.

Direct Deposit

- **Yes/No Direct Deposit:** Select this check box if the employee has elected to receive payment by direct deposit. Once selected, you MUST go to the **Direct Deposit** tab to set up your direct deposit

- information. The **Direct Deposit** election will not be saved without the **Direct Deposit** details. For more information, see Employee Info - Direct Deposit Tab.

  Note: Direct Deposit must be set to Yes if you want to print or email payment vouchers. For more information, see the W2/Vouchers tab.

- **Disable Prenote:** Select this check box to disable prenote, if applicable. If the **Disable Pre-Note for Direct Deposit** is selected in the Abila MIP Administration module settings for Direct Deposit, this check box will be selected by default.
- **Last Modified:** Enter the last modified date defines when the last prenote was sent.

Employee Info - Direct Deposit Tab

Access this tab using Details>Employee Info or Details . This tab is only accessible if the Direct Deposit check box is selected on the Current Pay tab.

Use this tab to set up the employee's direct deposit information–**Bank Routing Number**, **Account Number**, **Percentage**, **Amount**, and the **Type** of account. You can also determine whether or not to send a Pre-note to the employee's bank.

Fields

Routing Number: Enter the employee's bank routing number. This is the nine-digit routing number that prints on the bottom of the check or deposit slip.

Account Number: Enter the employee's checking or savings account number.

Account Type: Select the type of account for the funds to be deposited–either **Checking** or **Savings**.

Percent: Enter the percentage of the **Net Pay** to be deposited into the employee's bank account. At least one line item must contain a percentage and the **Percent (%)** column must total 100, regardless of whether any amounts have been entered.

When entering percentages, include a decimal point. For fractional percentages, enter the leading zeroes. For example, enter the following numbers to indicate the following percentages:

.0005 = .05%

.005 = .50%

.05 = 5.00%

.5 = 50.00%

1 = 100.00%

The system calculates up to four places to the right of the decimal point.

Amount: Enter the amount to be deposited into the employee's bank account. During transfer, the system first distributes monetary amounts. If more than one line has an amount, then the system distributes amounts in the order in which they were entered. Any remaining amount is distributed according to percentages.

Tip: It is a good idea to obtain a voided check or deposit slip, from the employee, in order to have the bank routing number and account number needed to complete this tab.

Employee Info - Earnings Tab

Access this tab using Details>Employee Info or Details .

Use this tab to add a new **Earning Code** or update an existing one, and enter the employee's hours, percentages, and account code segments to be used for default reporting.

Note: The **Calc Method** is automatically populated based on the **Earnings** code.

Payroll Users: The Earnings Table and Distribution Table information defaults to the values set up in the Payroll module.

EWS Users: The Distribution Table information is automatically reallocated each pay period based on the number of hours and the cost centers entered on the Employees Web Timesheet.

Fields

Earnings Table Code, Calc Method, Hours, Rate, Amount, Distribution Code: The **Earnings** table is used to select earning codes, enter hours, rates or amounts, and select distribution codes. The system displays an abbreviation for the calculation method on each row. An amount is required if the selected earning code uses a calculation method of **Amount on Timesheet** (AT). A rate is required if the selected earning code uses a calculation method of **Rate on Timesheet** (RT). Furthermore, hours are required if the selected earning code uses **Rate Multiplier** (RM), **Fixed Hourly Amount** (FH), **Employee Pay Rate** (ER), or **Rate on Timesheet** (RT). Also note that a **Distribution Code** is required for every code.

Distribution Table Hours, Percent, {Segment Name}: Enter the employee's hours, percentages, and account code segments to be used for default reporting.

Total Hours: This is the employee's total for the **Hours** column entered on the **Earnings** tab, excluding any **Earnings Code** that is **Contribute to Net Pay Only**.

Total Percent: This is the employee's total percent for the **Percent** column entered on the **Earnings** tab. This percent must total 100%.

Tips:

- If you use web timesheets, create the distribution in the lower portion of the tab, then add the wage codes. This automatically creates a distribution code with the employee ID.
- Default Timesheets should be assigned to employees who have the same payroll information week after week. The information entered on the **Earnings** tab automatically displays on the **Timesheet Entry** form for both Regular and Supplemental Timesheets in the Payroll module. This tab should contain information to use every time payroll is processed. Although you do not have to use Default Timesheets for employees, it saves you from having to enter employees' timesheet information each time payroll is processed.

Employee Info - Dependents Tab

Access this tab using Details>Employee Info or Details .

Use this tab to set up dependent information for employees.

Fields

Relation: Select a relationship type from the drop-down list. These codes were created using **Maintain>Code Table>Relationship Types** code.

Dependent Type: Select a dependent type of **Dependent**, **Beneficiary**, **Both**, or **Other**.

Last Name, First Name, Middle: Accept the employee's last name as a default, or enter the last name of the dependent. Then enter the first name and middle name for the dependent. A middle name or initial is not required.

Birthday: Enter the dependent's date of birth.

Gender: Enter a gender of male or female.

Work Phone: Enter the dependent's work telephone number.

Address, City, State, ZIP, Voice Phone: Enter the dependent's home address, including the city, state, zip code, and telephone number.

SSN: Enter the dependent's social security number.

Tip: **Copy**, **Cut**, **Paste**, and **Delete** are available using the right-click menu.

Employee Info - Benefit Plans Tab

Access this tab using Details>Employee Info or Details .

Use this tab to set up employees and their dependents for active benefit plans, created using **Maintain>Benefit Plan** or Benefits Plans . First, you must set up the code as a **Benefit Code** in the Payroll Module and select the **Calculation Method** of **Amount on Timesheet** or **Percentage on Timesheet**. Afterwards, you will need open the **Benefits Plans** form again in the Human Resources module using **Details>Employee Info> Benefit Plans** tab.

Note: You can assign multiple plans with the same plan code and have multiple effective/expiration dates.

Fields

PlanID: Select the **benefit plan ID** from the drop down list.

Effective Date: By default, today's date displays However, if the plan's effective date is in the future, the **Effective Payroll Timesheet** date displays (**Maintain>Benefit Plans**) or if the effective date is in the past, the date will default to today's date. You can also enter a future date.

Expire Date: Enter the plan's expiration date. You can set this on an employee level.

Calc from Plan: Select this check box if the premium is calculated based on the plan options entered in the **Maintain>Benefit Plan** form.

Plan Option: If **Plan Options** have been entered in the **Maintain>Benefit Plan** form, select the plan option from the drop down list.

Premium: You must enter the premium amount, if the **Calc from Plan** check box is ***not*** selected. However, if the **Calc from Plan** check box is selected, then the premium is automatically populated from the plan information entered in the **Maintain>Benefit Plan** form and the amount cannot be changed.

Deduction: You must enter the deduction amount, if the **Calc from Plan** check box is ***not*** selected. However, if the **Calc from Plan** check box is selected, then the deduction is automatically populated from the plan information under **Benefit Plan Maintenance** and the amount cannot be changed.

Other Amount: Enter the other amount election, such as 401K or life insurance.

Dependents: Click to select the dependents that are associated with the employee for this benefit plan. **Dependent** information was set up using the **Dependents** tab.

Notes: Enter any specific notes or reminders about this benefit plan.

Tips:

- Any changes made to this tab will automatically create a record on the Actions tab. This helps maintain an audit trail for changes to employee information.
- If benefits are set up in the Payroll module with associated deductions, when a benefit plan is added the deduction code will automatically be added to this tab.

Employee Info - Benefits Tab

Access this tab using Details>Employee Info or Details .

Use this tab to add a new benefit code or update an existing one.

Note: Benefits must be set up in the Payroll module using **Maintain>Benefit Codes**.

Fields

Code: Enter a benefit code or select one from the drop-down list. You should make the first eight characters of the code unique so that the paycheck displays a useful identifier. We recommend limiting your entry to strictly alphabetic characters (A through Z) or numeric characters (0 through 9), and avoiding the use of symbols.

Calc Method: The system displays the calculation method selected in the Payroll module (**Maintain>Benefit Codes**).

Rate: The system displays a percentage, if the **Fixed Percentage of Earnings (FP)** calculation method was selected for the benefit. Enter an amount if the calculation method is **Percentage on Timesheet (PT)**. The percentage you enter must be positive or zero; however, it cannot exceed the **Maximum Percentage** set on the **Maintain>Benefit Codes** form in the Payroll module.

Amount: The system displays an amount if a **Fixed Hourly Amount (FH)** or **Fixed Amount (FA)** calculation method was selected for the benefit. Enter an amount if the calculation method is **Amount on Timesheet (AT)**. The amount you enter can be positive, negative, or zero. (Use the minus key or the space bar to enter a negative amount.)

Tips:

- To set up employees and their dependents for active benefit plans, you must first set up the code as a Benefit Code in the Payroll Module and select the Calculation Method of *Amount on Timesheet* or *Percentage on Timesheet*. Afterwards, you will need open the Benefits Plans form again in the Human Resources module using Details>Employee Info> Benefit Plans Tab.
- If benefits are set up in the Payroll module with associated deductions, when a benefit plan is added the deduction code will automatically be added to the Benefit Plans tab as well.

Employee Info - Deductions Tab

Access this tab using Details>Employee Info or Details .

Use this tab to add a new deduction code or update an existing one.

Note: Deductions must be set up in the Payroll module using **Maintain>Deduction Codes**.

Fields

Code: Enter a deduction code or select one from the drop down list. You should make the first eight characters of the code unique so that the paycheck displays a useful identifier. We recommend limiting your entry to strictly alphabetic characters (A through Z) or numeric characters (0 through 9), and avoiding the use of symbols.

Calc Method: The system displays the calculation method selected in the Payroll module (**Maintain>Deduction Codes**).

Rate: The system displays a percentage, if the **Fixed Percentage of Earnings (FP)** calculation method was selected for the deduction. Enter an amount if the calculation method is **Percentage on Timesheet (PT)**. The percentage you enter must be positive or zero; however, it cannot exceed the **Maximum Percentage** set on the **Maintain>Deduction Codes** form in the Payroll form.

Amount: The system displays an amount if a **Fixed Hourly Amount (FH)** or **Fixed Amount (FA)** calculation method was selected for the deduction. Enter an amount if the calculation method is **Amount on Timesheet (AT)**. The amount you enter can be positive, negative, or zero. (Use the minus key or the space bar to enter a negative amount.)

Tips:

- To set up employees and their dependents for active benefit plans, you must first set up the code as a Benefit Code in the Payroll Module and select the Calculation Method of *Amount on Timesheet* or *Percentage on Timesheet*. Afterwards, you will need open the Benefits Plans form again in the Human Resources module using Details>Employee Info> Benefit Plans Tab.
- If benefits are set up in the Payroll module with associated deductions, when a benefit plan is added the deduction code will automatically be added to the Benefit Plans tab as well.

Employee Info - Garnishments Tab

Access this tab using Details>Employee Info or Details .

Use this form to enter a wage garnishment for an employee or update an existing one. **Garnishments** must be set up as a deduction code in the Payroll module using **Maintain>Deduction Codes**. **Garnishment Type** is selected on the **Maintain>HR Codes** form.

To calculate garnishments, you must first calculate the Payroll, then select **Activities>Calculate Garnishments**. This calculates the disposable income and garnishes the wages from the employee's paycheck.

Note: Disposable income and Garnishment calculations can be customized on the Activities>Calculate Garnishments form.

Fields

Garnishment Type: Select a garnishment type. This was set up using the **HR Codes>Garnishment Types**.

Priority: The garnishment order is an automatic-increment numbering system which defaults to the next number when multiple garnishments are collected. The numbers can be modified to arrange the wage garnishments in an order of their priority from first to last.

Date Order: The date the order was received to begin the wage garnishments. You can set future dates if necessary.

End Date: The date the garnishment expires, such as the date the court order ends.

Deduct Code: Select the deduction code for the garnishment. This was set up using **Payroll>Maintain>Deduction Codes** and has a **Calculation Method** of **Amount on Timesheet**.

% of Pay: Select this check box if **Percent of Earnings** apply.

Percent: If the **% of Pay** check box is selected, enter a decimal value that represents the percentage. For 20%, enter 0.20.

Amount: If the **% of Pay** check box is not selected, enter a currency value that represents the amount to be garnished from each pay period.

Max Amount: Enter the maximum amount that can be garnished based on the running total amount in **Calculate Garnishments**.

Status: The system defaults to **Active**. You can select **Inactive** to keep garnishment information in the record without taking it out of the check.

Creditor Name: Enter the creditor name.

Creditor Address: Enter the creditor address.

Creditor Tracking #: Enter the tracking number.

Contact Name: Enter the name of the contact for this Creditor.

Contact Phone: Enter the contact’s phone number.

Contact Fax: Enter the contact’s fax number.

Contact Email: Enter the contact’s email address.

Vendor: Enter a vendor. This is not associated with the Accounts Payable module.

Health Prem Code: Enter a **Health Premium** code which was set up as a **Deduction** code, if applicable.

Retirement Code: Enter a **Retirement** code which was set up as a **Deduction** code, if applicable.

Notes: Enter notes regarding the details of the garnishment for tracking purposes.

Tips:

- Once payroll and garnishments have been calculated, it is a good idea to run the Reports>Calculated Garnishments to see employee information and calculations before printing payroll checks.
- If a garnishment type deduction is set up on the Default Timesheet in the Payroll module, the system will calculate it as a deduction not as a garnishment.
- Instead of deleting a garnishment after it has expired, use the End Date. This will allow you to keep track of how much was actually garnished for any particular order.

Employee Info - Leave Tab

Access this tab using Details>Employee Info or Details .

Use this tab to add a new leave code or update an existing one.

Leave Plans can be customized using **Maintain>Leave Plans** or **Leave Plans** ; however, first they must be set up as **Leave Codes** in the Payroll module using **Maintain>Leave Codes** and have the calculation method of **Amount on Timesheet** or **Percentage on Timesheet** selected.

Fields

Code: Select the leave code for eligible leave accruals. Leave codes are set up in the Payroll module using **Maintain>Leave Codes**.

Calc Method: The system displays the calculation method for each leave code selected.

Rate: If the Calculation Method selected was Percentage on Timesheet, the system displays the rate entered.

Current Balance: The current balance comes directly from the Payroll module leave calculations.

Hours Accrued: The number of hours accrued during the current payroll period is required if the selected leave code uses a calculation method of Amount on Timesheet (AT).

Hours Taken: Enter the leave hours taken during the current payroll period. This will get calculated when you run the **Leave Calc Wizard**. If an employee reaches the **Carryover** cap or **Max Accrued** balance. Note that actual leave hours taken should be entered on the **Regular** timesheets after **Default** timesheets have been loaded.

Ending Balance: The ending balance is automatically calculated.

Tips:

- It is important to only set up **one Leave Code** per **Employee Leave Plan**.
- Leave hours taken on the default timesheet are a reflection of calculating the annual carryover or the maximum accrued amount.

Employee Info - Worker's Compensation Tab

Access this tab using Details>Employee Info or Details .

Use this tab to add a new workers' compensation code or update an existing one.

Note: Workers' compensation codes are set up in the Payroll module using **Maintain>Workers' Compensation Codes**.

Fields

Code: Select the workers' compensation code from the drop-down list. These codes were set up in the Payroll module.

Calc Method: The system displays an abbreviation of the calculation method for each code selected–**RW** (Rate per Hours Worked), **RH** (Rate per Workers' Compensation Hours), or **RE** (Rate per $100 Earnings).

Rate: The system displays the rate associated with this code.

Hours: Enter the number of hours if the calculation method is **Rate per Workers' Compensation Hours–RH**.

Employee Info - Leave Events Tab

Access this tab using Details>Employee Info or Details .

Use this tab to assign and track leaves of absence, for example, those covered by the Family Medical Leave Act (FMLA).

The condition must either prevent the worker from performing his or her job, or require the worker to care for a family member

To record a leave of absence:

- Enter the Leave Type, Date Requested, Start Date, Scheduled Return date, Actual Return date, Reason, Notes, Cobra, and Event Date.
- Click Save to save your entries.

Important! To complete this form, you must understand the FMLA regulations governing employee eligibility requirements and situations covered by FMLA and medical certification requirements.

Fields

Leave Type: Select the leave type from the drop-down list. Leave Type was set up using Maintain>Code Table and with *Leave Event Type* selected from the drop-down list.

Date Requested: Enter the date the leave was requested. The system defaults to the current system date.

Start Date: Enter the leave start date. The system defaults to the current system date.

Scheduled Return: Enter the scheduled date the employee is expected to return back to work. The system defaults to the current system date.

Actual Return: Enter the day the employee actually returned to work.

Hours Away: Enter the number of hours the employee was away during their leave of absence.

Reason: Select the reason for the leave from the drop-down list. Reason was set up using Maintain>Code Table and with *FMLA Reasons* selected from the drop-down list.

Notes: Provide any additional comments relative to this Leave Event.

Cobra: Select the COBRA coverage option code from the drop-down list. Cobra was set up using Maintain>Code Table and with *Cobra Coverage Option* selected from the drop-down list.

Event Date: Provide the event date for the FMLA leave.

Med. Certification: Enter the day the employee provided medical certification to substantiate the FMLA leave, if applicable.

Med. ReCert: Enter the day the employee provided medical recertification to substantiate the FMLA leave, if applicable.

Persons Name: Enter the name of the family member for whom the employee is requesting an FMLA leave.

Relationship: Select the family member's relationship to the employee from the drop-down list. Relationship was set up using Maintain>Code Table and with *Relationship Types* selected from the drop-down list.

Employee Info - Taxes Tab

Access this tab using Details>Employee Info or Details .

Use this tab to enter the employee's tax information.

Fields

Federal Withholding Tax: Select a Federal tax withholding status of Single/Head of Household, Nonresident Alien Single/Head of Household, Married, or Nonresident Alien Married.

Note: The First and Last Name (located on the Personal tab) and Social Security Number fields are not required, however, these fields are needed when processing the employee's timesheet in the Payroll module.

- **Number of Withholding Allowances:** Enter the number of withholding allowances the employee has selected.
- **Additional Withholding:** Enter the additional federal withholding amount or enter a zero, if none.

Other Tax: Other tax codes were set up in the Abila MIP Payroll module using Maintain>Other Taxes.

- **Assign Other Taxes Tax Code, Additional:** Select an employee and/or employer paid other tax code from the drop-down list. Enter any additional tax to withhold from each paycheck. Enter an amount or zero, if none.

- **Exemptions/Deductions Code, Description, Number:** Select an exemption/deduction code, its description, and the number of exemptions/deductions. The number entered is multiplied by the annual amount entered for the exemptions/deductions code. These exemptions/deductions were set up on the Maintain>Other Taxes>Employee Taxes tab and are not always applicable.

Federal Tax ID

- **Social Security:** Enter the employee's social security number.
- **Spouse SSNbr:** Enter the spouse's social security number, if applicable.

State Unemployment Tax State: Select the state for unemployment taxes. State tax information was set up in the Payroll module using Maintain>State Taxes.

State Withholding Tax

- **State:** Select the state or territory code from the drop-down list.
- **Additional Withholding:** Enter the additional state withholding amount or enter a zero, if none.
- **Exemptions:** Enter the number of exemptions for State Withholding Tax.
- **Marital Status:** Select the marital status of Head of Household, Married, or Single.
- **Dependent Exemptions:** Enter the number of dependent exemptions for State Withholding Tax.
- **Deductions:** The amount of deductions displays.
- **Withholding Credits:** The amount of withholding credits displays.

Employee Info - W2/Voucher Tab

Access this tab using Details>Employee Info or Details .

Use this tab to enter information about this employee's W-2, to indicate if this is a Medicare Qualified Government Employee (MQGE), and to set payroll voucher options.

When a **W-2 Box 13** item is selected, the system prints the information on the employee's W-2. The payroll voucher options are used for each payroll cycle to print or email a voucher.

Fields

Medicare Qualified Government Employee: Select this check box if you are a government employer and the employee is a Medicare Qualified Government Employee.

Box 13 Items: Select the check box for each category that applies to this employee.

- **Statutory Employee:** Select this check box if the employee is classified as an "employee by statute" for Social Security and Medicare taxes but is not subject to federal income tax withholding.
- **Retirement Plan:** Select this check box if the employee was an active participant for any part of the year in a retirement plan.
- **Third-Party Sick Pay:** Select this check box only if you are a third-party sick pay payer filing a Form W-2 for an insured's employee or are an employer reporting sick pay payments made by a third party.

Electronic Employee W-2: If you use Aatrix to issue electronic W-2 forms, specify the options in this section.

- **Issue employee W-2 electronically using Aatrix:** Select this check box to send the employee an electronic W-2 form using the Aatrix application.
- **Email:** Enter the email address to which the electronic W-2 form should be sent.

Payroll Voucher: Select the options to use for employee's payroll voucher. These options can only be selected if the **Direct Deposit** option is selected on the Current Pay tab.

- **Print Paper Voucher:** This is the default option and indicates that a paper voucher will be printed.
- **Email Voucher:** Select this check box if the voucher should be emailed to the employee. You must have the email feature of Abila MIP set up and a **<Default> Voucher** template available in the Payroll module before this option can be selected.
- **Email:** Enter the email address that should be used for this employee's voucher. Use a separate line for each email address you enter. If you are entering multiple email addresses, each address must be separated with a semi-colon and a space. Example, you@email.com; me@email.com.
- **Voucher Process Template:** Accept the Default or select a voucher process template. You must have the email feature of Abila MIP set up and a **<Default> Voucher** template available in the Payroll module before this option can be selected.

Employee Info - Education Tab

Access this tab using Details>Employee Info or Details .

Use this tab to maintain employee's education information.

Note: These fields can be modified and additional fields can be added using **Options>Settings>Field Setup**.

Fields

School: Enter the name of the school where the employee attended.

Degree: Select the employee's earned degree. **Degree** was set up using **Maintain>Code Table** and with **Education Degrees** selected from the drop-down list.

Major: Select the employee's major. **Major** was set up using **Maintain>Code Table** and with **Education Major** selected from the drop-down list.

License: Enter a license number, if applicable.

Years: Enter the number of years the employee attended the school.

GPA: Enter the employee's earned GPA.

Employee Info - Certification Tab

Access this tab using Details>Employee Info or Details .

Use this form to track employee credential information.

Note: **Credential Type**, **Authorization Type**, and **Credential Number** field names can be modified and additional fields can be added using **Options>Settings>Field Setup**.

Fields

Credential Type: Select the credential type from the drop-down list. **Credential Type** is set up using **Maintain>Code Table** and with **Credential Type** selected from the drop-down list.

Authorization Type: Select the authorization type from the drop-down list. **Authorization Type** is set up using **Maintain>Code Table** and with **Authorization Type** selected from the drop-down list.

Credential Nbr: Enter the credential number, if any. The title of this field may be changed or deleted using the **Options>Settings>Field Setup** form.

Effective: Enter the effective date of the credential. The system displays the current system date.

Expiration: Enter the expiration date of the credential. The system displays the current system date. If a certification has expired, the row will be gray.

Name Different: Select this check box if the name on the credential is different from the employee's current name.

First Name, Mid Name, Last Name: If the name different check box is selected, enter the first, middle and/or last name as it appears on the certificate or diploma. These optional fields can be removed by clearing the **Show fields for employee name on credential if name is different** check box using the **Options>Settings>Field Setup** form.

Notes: Enter any relevant notes about this credential.

Status: Select the credential status of **Active** or **Inactive**.

Employee Info - Actions Tab

Access this tab using Details>Employee Info or Details .

Use this tab to enter actions or view the actions automatically recorded. Action records are automatically created when changes are made to employee information. This helps maintain an audit trail for changes to employee information.

By default, this tab displays only uncleared actions. To view all actions, click the on the **Cleared** column heading and select (All).

Note: To schedule a **Human Resources Action** date using the calendar feature, be sure that your **Employee ID** is entered using **Maintain>User Security**.

Fields

Action Type: Select an action type from drop-down list. **Action Type** was set up using **Maintain>Code Table** and with **Actions** selected from the drop-down list.

Schedule Appointment: After you enter an action type, click the **Calendar** button to open the Schedule Appointment form.

Action Date: Enter an action date.

Due Date: Enter an action due date.

Note: Enter notes for the action.

Cleared: Select this check box to clear the action item after it is completed.

Status: Select an action status or accept the default status of **Active**.

Before Change: The information before the change displays.

After Change: The information after the change displays.

Entered By: The system automatically enters the person (**User ID**) who entered a change.

Scheduled: This check box is automatically selected when the event has been scheduled in the calendar.

Tips:

- To view all actions, click the Filter of the cleared header and select (**All**).
- You can turn off this feature by selecting the **Disable Action Records** check box on the **Options>Settings>System Preferences** form. However, we recommended **only** using the **Disable Action Records** check box when you are in the setup process and adding new records. Immediately after the setup is complete, **Actions** should be turned back on.

Employee Info - HR Processes Tab

Access this tab using Details>Employee Info or Details .

Use this tab to assign HR processes to employees and to monitor the process workflows.

✓ Before you can assign processes to an employee, you must create HR processes for new employee orientation, hiring processes, termination, or other human resources procedures by using the form in the Maintain HR Processes window.

Important! If you delete any Assigned Processes from an employee's record, you will need to manually delete them from the Notifications Log. Otherwise, if using HR Notifications, the emails will get sent.

Fields

Type: Displays the HR process type associated with the task the employee must complete. The process type is set in the **Maintain HR Processes** window.

Task: Displays the task name.

Assigned: Displays the date the task was assigned to the employee. For information about assigning tasks, see Assigning HR Processes.

Completed: Select this check box when the employee has completed the assignment.

Date Completed: Enter the date that the task was completed.

Notes: Use this field to add a note about the task.

Required: Select this check box if this Task is required for the HR Process.

Web Approval: Select this check box to allow the task to be viewed and approved in the approvers' check lists in EWS.

HR/Payroll Staff: Select the name of an HR or Payroll staff member to approve the task, as needed.

Manager: Select the name of a manager to approve the task, as needed.

Supervisor: Select the name of a supervisor to approve the task, as needed.

Other Approver: Select the name of another approver for the task, as needed

Date Approved: For each task, enter an approval date for each approver or select a date from the calendar. If **Web Approval** is selected, this field can be left blank and will be populated when the manager approves the task in EWS.

Buttons

Assign Processes: Use this button to open the Add Processes window and assign a set of HR processes to the specified employee. When you assign an HR process to an employee, an audit record is created. Use **Query>Run Query>HR Processes** to view assignments within a specified date range.

Employee Info - Performance Tab

Access this tab using Details>Employee Info or Details .

Use this tab to record the employee's job performance information.

Fields

Review Date: Accept today's date as the default, or enter the review date. This automatically creates an **Action Record** as an audit trail. It does not schedule a future event.

Review Rating: Select the review rating, such as **Proficient**, **Satisfactory**, or **Unsatisfactory**. **Review Rating** was set up using **Maintain>Code Table** and with **Performance Review Rating** selected from the drop-down list.

Employee Comment: Enter any employee comments.

Manager: Select the employee's Manager from the drop-down list.

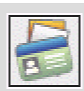
Manager Notes: Enter any manager notes.

Increase Date: Accept today's date as the default, or enter the date the employee receives an increase in pay.

Increase %: Enter the percent increase that the employee receives.

Next Review: Enter a future date when the employee's performance review will occur.

Employee Info - Termination Tab

Access this tab using Details>Employee Info or Details .

Use this tab to enter the employee's termination information.

Fields

Termination Date: Enter the date the employee was terminated. This automatically creates an **Action Record**.

Last Hire Date: The system displays the date the employee was hired.

Last Worked Date: Enter the date the employee last worked.

Termination Type: Select a termination type of **Involuntary**, **Uncontrollable**, or **Voluntary**.

Termination Reason: Select the reason for the employee's termination. **Termination Reason** was set up using **Maintain>Code Table** and with **Termination Reason** selected from the drop-down list.

Can Rehire No, Yes: Select whether the employee is eligible to be rehired.

Termination Notes: Click the **Edit** button to enter any termination notes.

Employee Info - Photo Tab

Access this tab using Details>Employee Info or Details .

Use this tab to add and view the employee's picture.

Fields

Employee Photo: The selected photo of the employee displays.

Browse: Enter the picture location and file name or click **Browse** . Navigate to the picture location and select the desired photo. Photos can be in the following formats: .jpg, .gif, .bmp, .tif, .png.

Employee Info - Attachments Tab

Access this tab using Details>Employee Info or Details .

Use this tab to add, delete, or open attachments related to the employee.

Note: Attachments are saved as linked documents and they are stored in a folder that is marked to be shared. However, if you change the employee ID, the attachments are not automatically moved to the new ID. You must attach the documents again to the new ID.

Fields

Name: The name of the attachment.

Type: The type of the attachment file, such as jpg file.

Size: The file size of the attachment.

Date Modified: The date the file was modified.

Add Attachments: Use this button to add an attachment. Enter the name and path where the attachment is located.

Open Attachments: Use the button to view all attachments for the employee.

Delete Attachments: Use this button to remove the selected attachment.

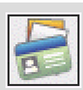
Employee Info - Notes Tab

Access this tab using Details>Employee Info or Details .

Use this tab to record any specific notes or reminders about the employee. This is a free-form area; each line can be longer than the width of the form. Press **Enter** to move down to the next line. Click the **Add Time Stamp** button to enter the current system time and date information.

Payroll Users: Notes display from the Employee Information - Notes field (using Payroll>Maintain>Employee Information).

Employee Info - User Defined Field Tab

Access this tab using Details>Employee Info or Details .

Use this tab to enter employee data for any user defined fields. These fields were previously created and assigned characteristics using **Abila MIP Administration>Organization>Set Up User Defined**

Fields>Setup tab. When entering data in the **Value** column, you must adhere to the predefined settings, such as field type, length, and decimal places. For example, if the field was set up with a field type of **Number**, you cannot enter alphabetic characters for that field.

Once fields have been created, the system automatically creates the **User Defined Fields** tab. Otherwise, the **Employee Information** form is available, but without the tab and any user defined fields.

Fields

Display Name: The system displays the name that was assigned to this field. This name cannot be edited here, but it can be changed on the **Abila MIP Administration>Organization>Set Up User Defined Fields>Setup** tab.

Value: Enter the data for this user defined field. Data for **Currency** fields can only be entered in US Dollar (USD). This field is required for new codes if the **Required** check box was selected when the field was created in the **Administration** system.

Employee Info - Add Processes Window

Access this window using Details>Employee Info>HR Processes>Assign Processes button.

Use this tab to assign HR processes to a specified employee. For detailed steps to accomplish this task, see Assigning HR Processes. For information about creating a set of HR processes, see Maintain - HR Processes.

Fields

Process Type: Select the HR process type. The process type is set in the Maintain HR Processes window.

Date Assigned: Enter the date when the task will be assigned to the employee.

Restrict by options: The following options can be used to restrict the assignment

- **Location:** Select a location assign only those tasks that apply to the selected location.
- **Department:** Select a department to assign only those tasks that apply to the selected department.
- **Process Group:** Select a process group to assign only those tasks that apply to the selected group.

Items to be added: This section lists the tasks that will be assigned to the employee, based on the process type and restrictions you specify. You can delete a task if it does not apply to this employee. You cannot edit the list items in this window. They can be edited in the Maintain - HR Processes tab.

Buttons

Add: Use this button to add the specified tasks to the HR Processes tab for the employee. You can then edit the list to include completion dates and approvals as needed.

Cancel: Use this button to return to the HR Processes tab without adding the selected tasks.

Assigning HR Processes

✓ Before you can perform this task, you must create at least one HR process by using the Maintain-HR Processes window.

Use the following steps to assign HR Processes to an employee.

1. In the **Details>HR Processes** tab, select the employee who needs the process completed from the drop-down list.
2. Click **Assign Processes**. The **Add Processes for employee ID: (employee ID)** window displays.
3. Select a **Process** to assign to the selected employee (for example, **New Hire Process**).
4. Select the **Date Assigned**. You can assign the same process multiple times to an employee if each assignment occurs on a different date.
5. If the selected process type is customized for different locations, departments or process groups, you can restrict the assignment by selecting the appropriate values from the **Restrict by** options.
6. Review the Items to be added list to make sure it meets the requirements for the selected employee and process.
   - Items that are marked **Required** in the process (**Maintain>HR Processes**) are shown as required in the list. You cannot change the requirement from this view. To edit the task, use the Maintain>HR Processes feature.
   - Assign the Staff, Manager, and Supervisor Approvers.
   - You can delete a row if a task does not apply to the selected employee.

7. Click **Add** to assign the tasks to the employee's list and return to the **HR Processes** tab, or **Cancel** to return to the tab without assigning the tasks to the employee.

8. The system displays a message that shows how many tasks have been added to the list. Click **OK** to continue.

9. In the **HR Processes** tab, edit each task row as follows:

    a. Check the **Web Approval** option for the task if it should appear in the approvers' check list in EWS.

    b. Add any **Notes** that apply to the task for this employee.

    c. Select one or more approvers who must add their approval when the employee has completed the task.

10. Click **Save** to save your changes.

11. If HR Notifications is used, the Employee, Managers, Supervisors and other assigned will receive notifications regarding their assigned Tasks. Use the Notifications Log, to view every HR Process assigned using Activities>Notifications Log.

    Important! If you delete any Assigned Processes from an employee's record, you will need to manually delete them from the Notifications Log. Otherwise, if using HR Notifications, the emails will get sent.

12. When the employee completes a task in the list, you can update the task as follows:

    a. Check the **Completed** option.

    b. Enter the completion date in the **Date Completed** column.

    c. Edit or add any **Notes** that apply to the task.

    d. If **Web Approval** is selected, each approver can review and approve the task in EWS. The **Date Approved** is populated automatically for each approver.

Tip: When you assign an HR process to an employee, an audit record is created. Use **Query>Run Query>HR Processes** to view assignments within a specified date range.

Certifications

Access this tab using Details>Certification .

Use this form to display and edit employee certifications. To add certifications, click the **Add** button to open the Add Certifications window.

Note: The default heading columns are listed below, but you can use the **Field Chooser**  (in the first column of the table) to view and select the columns that are displayed or hidden in the table. Just click  and select or clear the check box next to each available field. After you have made your selections, click the  to close the Field Chooser window and apply your selections.

Fields

Employee ID: Displays the employee ID of the certified employee.

First Name: Displays the first name of the certified employee.

Last Name: Displays the last name of the certified employee.

Location: Displays the employee's location.

Department: Displays the employee's department.

Manager: Displays the employee's manager.

Supervisor: Displays the employee's supervisor.

Credential Type: Displays the credential type for the certification.

Authorization Types: Displays the authorization type associated with the certification.

Credential Nbr: Displays the credential number associated with the certification.

Effective: Displays the effective date of the certification.

Expiration: Displays the expiration date of the certification.

Notes: Displays any notes about this certification.

Status: Displays the credential status of **Active** or **Inactive**.

Buttons

Add: Click **Add** to open the Add Certifications window and assign certifications to employees.

Save: Click **Save** to save any changes to the certifications list.

Close: Click **Close** to close the Certifications window.

Export: Click **Export** to save the data as an Excel (*.xls) file type.

Adding a Certification for Multiple Employees

Use the following steps to add a certification for one or more employees:

1. Select **Details>Certifications** from the menu. The employee certifications table appears.
2. Click **Add**. The Add Certifications window opens.
3. In the left pane:
    a. Select a **Credential Type**. Credential types and Authorization Types are maintained in the Code Tables.
    b. Select or enter an **Authorization Type**, **Credential Number**, **Effective** date, **Expiration** date, any relevant **Notes**, and a **Status**.
4. In the right pane, select a check box for each employee who holds the certification.

    Note: To add multiple employees, click on the  to highlight a row, then press and hold the Shift Key and use your mouse to click multiple rows to be included in the group. Then click the space bar to select these employees. If any of the employees included in this group were previously Selected and are included in the group selection, when the space bar is pressed, their check box will be cleared and they will NOT be included for this certification.

5. Click **OK**. The window closes and the certifications are added to the list of certifications.

Form 1095-C

Access this form using Details>Form 1095-C.

Use this form to enter the employee and dependent health insurance information for the new Affordable Care Act (ACA) regulations.

Procedures

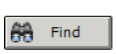
To enter information for each employee individually, complete the following steps:

1. Select the Employee ID form the drop-down list.
2. Enter the Year ID, or accept the current year default.
3. Select the Benefit ID.
4. If the Employer provided self-insurance coverage, select the check box.
5. On row 14 Offer of Coverage, select the code from the drop-down list for each month. The system gives you the option to enter your January selection for the remaining 11 months, by clicking Yes.
6. On row 15 Employee Share of Lowest Cost Monthly Premium, enter an amount for each month, if applicable. The system will update the remaining months with the January value by clicking Yes.
7. On row 16 Applicable Section 4980H Safe Harbor, select the code from the drop-down list for each month, if applicable.
8. Click Save to save your selections.
9. Repeat Steps 1 - 8 for each employee.

Note: It is recommended to use the Mass Update feature to enter in basic information for every employee and then use the Form 1095-C to modify the employee information individually.

To view the information entered for all employees, complete the following steps:

1. Open Details>Form 1095-C and select an Employee ID from the drop-down list.
2. Enter the Year ID or accept the current year default.
3. You may have to Save the form, if changes where made.
4. Click Find to displays all employees health insurance information, entered on the Form 1095-C or by using the Mass Update Utility for the Form 1095-C. You may need to scroll to view all of the information.



Note: To make a change on the Find form, you must double-click on the employee row. That employee's information will open and display on the Form 1095-C. This is where you make your changes.

a. On the Find form, click Close to return to the Form 1095-C.

Note: You cannot make changes on the Find form, it is for display only.

Fields

Employee ID: Select the Employee ID form the drop-down list. Once selected, the Employee name and address displays.

Year ID: Enter the Year ID, or accept the current year default.

Benefit ID: Enter your Benefit Plan ID. Once selected, the Plan Options and Monthly Premium amount display.

Employer provided self-insured coverage: Select this check box if the Employer provided self-insurance coverage.

Part II

- **14 Offer of Coverage:** Select the code from the drop-down list for each month. The system gives you the option to enter your January selection for the remaining 11 months, by clicking Yes.
- **15 Employee Share of Lowest Cost Monthly Premium:** Enter an amount for each, if applicable. The system will update the remaining months with the January value by clicking Yes. Note this is for the Self-Only Minimum Value Coverage. This field will be enabled only if one of the following codes is selected in Line 14: 1B, 1C, 1D, or 1E.
- **16 Applicable Section 4980H Safe Harbor:** Select the code from the drop-down list for each month, if applicable.

Tip: It is recommended to use the Mass Update feature to enter basic information first; then to use the Form 1095-C to modify employee information individually.

Form 1095-C - Find

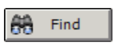
Access this form using Details>Form 1095-C> Find Find Button.

Use this option to display all employees health insurance information; one row for each employee. You may need to scroll to view all of the available information.

This is for display only. To make a change, you must double-click on an Employee ID; that employee's information will open on the Form 1095-C.

Procedures

To view the information entered for all employees, complete the following steps:

1. Open Details>Form 1095-C and select an Employee ID from the drop-down list.
2. Enter the Year ID or accept the current year default.
3. You may have to Save the form, if changes where made.
4. Click Find 

to displays all employees health insurance information, entered on the Form 1095-C or by using the Mass Update Utility for the Form 1095-C. You may need to scroll to view all of the information.

   Note: To make a change on the Find form, you must double-click on the employee row. That employee's information will open and display on the Form 1095-C. This is where you make your changes.

   ---

   a. On the Find form, click Close to return to the Form 1095-C.

Fields

Year ID: The system displays the Year ID entered on Form 1095-C.

Table

- **Employee ID:** The system displays the employee ID.
- **Name:** The system displays the employee's full name.
- **Benefit Plan ID:** The system displays the employee's benefit plan.
- **Status:** The system displays the employee's status.
- **Self-Ins:** The system displays a check mark if the Employer provided self-insurance coverage was selected for this employee.

- **Line 14 {Month}:** The system displays the Employee 's Line 14 Offer of Coverage Code selection for each month.
- **Line 15 {Month}:** The system displays the Employee's Line 15 Employee Share of Lowest Cost Monthly Premium amount for each month. This field will display an amount if one of the following codes is selected in Line 14: 1B, 1C, 1D, or 1E.
- **Line 16 {Month}:** The system displays the Employee's Line 16 Applicable Section 4980H Safe Harbor Code selection for each month. This field will display a Code when the Employer provided self-insured coverage check box is selected for the employee.

Scheduling

Access this form using Details>Scheduling>Monthly View.

Use this form to view your monthly schedule. By double-clicking on a scheduled calendar event, you can view its detailed information. To add a new calendar item, you must use the **Details>Employee Info>Actions** tab or **Details**  to schedule the appointment.

Fields

Action Type: Select an Action from the drop-down list, this indicates how the time for this item is marked on your calendar.

Scheduled for: Accept the default or select an employee name from the drop-down list. This is the employee associated with the scheduled appointment.

Location: The location entered on the Schedule Appointment form (**Details>Employee ID>Actions tab>Calendar** ).

Start Time: The start date and time for the appointment. The system automatically defaults to today's date.

End Time: The end date and time for the appointment. The system automatically defaults to today's date.

All day event: Select this check box to schedule the appointment for the entire day. An all day event is an activity that lasts 24 hours or longer for example, a trade show, a seminar, or a vacation.

Due Date: The date this action is due for completion.

Reminder: Select this check box to offer a reminder for the appointment, and choose when to be reminded of this item. To customize the sound that is played when a reminder is displayed, click the Sound button .

Bar Color: Select a bar color to more easily identify the appointment on your calendar.

Notes: Enter more information to clarify the actions for the appointment.

Save and Close: Click this button to save your scheduled appointment information and to close the form.

Schedule Appointment

Access this form using Details>Employee ID>Actions tab>Calendar .

Use this form to schedule a **Human Resources Action** for an employee, such as changes to the Benefit Plan, Current Job, Current Pay, Default Timesheet, Dependent, Employee Information, HR Information, Performance Review, Tax Information, or change requests using the Employee Web Services module.

Select an **Action Type** and click the Calendar . Once you have completed the form, click the **Save** and **Close** buttons to schedule the **Human Resources Action**.

Fields

Action Type: Select the action type from the drop-down list. **Action Type** was set up using **Maintain>Code Table** and with **Actions** selected from the drop-down list.

Scheduled for: Select the employee to whom this item pertains.

Location: Select the location where the appointment will occur.

Start Time: Set the date and start time for the appointment. The system automatically defaults to today's date.

End Time: Set the date and end time for the appointment. The system automatically defaults to today's date.

All day event: Select this check box to schedule the appointment for the entire day. An all day event is an activity that lasts 24 hours or longer for example, a trade show, a seminar, or a vacation.

Due Date: Enter the date this task is due. The system automatically defaults to today's date.

Reminder: Select this check box to offer a reminder for the appointment, and choose when to be reminded of this item. To customize the sound that is played when a reminder is displayed, click the **Sound** button .

Bar Color: Select a bar color to more easily identify the appointment on your calendar.

Notes: Enter more information about the appointment, if necessary.

Chapter 5: Activities

Use the Activities forms to calculate benefits, leave, and overtime; perform open actions and mass updates; and edit timesheets.

Benefit Calculation Wizard

Access this form using Activities>Benefit Calc Wizard or Update Benefits .

Use this form to recalculate all benefit rates, for all employees, for each pay period.

To begin the recalculation, enter the Benefits Calculation Date or accept the default of today's date and click the Calculate button. After the calculation completes, the system displays the last record that was updated in the calculation.

Note: When you recalculate benefits, an audit record is created. You can view the process history using **Query>Run Query>Process Log**, and including the process options in the query. The recalculate benefits process has a **Process Type** of **CalcBen**.

Fields

Benefit Calculation Date: Accept the default date or enter a date, and then click the **Calculate** button.

Note: The entered date should be either the beginning or ending date of the payroll, based on when an employee is eligible for earning benefits.

Creating a Benefit Plan

Complete the following checklist to create a benefit plan:

Abila MIP Payroll System

1. Open the Payroll module.
2. Using **Maintain>Benefit Codes**:

- On the **Benefit** tab, enter a **Benefit Code**, such as **401K**.
- On the **Calculation** tab, select the **Calculation Method** of **Amount on Timesheet** or **Percentage on Timesheet**.

3. Create an *identical* **Deduction** code using **Maintain>Deduction Codes**:
   - On the **Deductions** tab, enter a **Deduction** code, such as **401K**.
   - On the **Calculation** tab, select the **Calculation Method** of **Amount on Timesheet** or **Percentage on Timesheet.**

Abila HR Management System

1. Open the Human Resource Management module.
2. Using **Maintain>Benefit Plans**, complete the form:
   a. Select the **Benefit Code**.
   b. Set the **Status** to **Active**.
   c. Select a **Benefit Type**.
   d. Select the **Rate** on **Timesheet** check box, if applicable.
   e. Edit the **Payroll Timesheet Effective** and **Expiration** dates.
   f. Select the **Contribution to Cobra** check box, if applicable.
   g. Select the **Use Plan Options** check box, if applicable and complete the **Column** information and the **Rate Table** tab.
   h. Click the **Save** button and close the form.
3. Open the **Details>Employee** Info form:
4. Using the **Dependents** tab, enter dependent information by selecting a **Relation**, entering a **Name**, **Birthday**, **Gender**, and **Social Security Number**.
5. Using the **Benefit Plans** tab:
   a. Select the **PlanID** and complete the **Premium**, **Deduction**, and **Other Amount** information.
   b. If multiple **Dependents** are available, click the **Benefit Dependents** button  in the **Dependents** column. A **Dependent Benefits** table displays.

c. Select the **Dependents** that are participating.

d. Click **OK**.

6. Repeat this process for each **PlanID** that multiple dependents are participating.

7. Once complete, click the **Save** button and close the form.

Leave Calculation Wizard

Access this form using Activities>Leave Calc Wizard or Update Leave .

Use this form to recalculate all leave rates, for all employees, for each pay period.

To begin the recalculation, enter the Date used to calculate months employed or accept the default of today's date and click the Calculate button. After the calculation completes, the system displays a log containing the updates (Employee ID, Leave Code ID, and Rate).

Note: When you recalculate leave, an audit record is created. You can view the process history using **Query>Run Query>Process Log**, and including the process options in the query. The recalculate leave process has a **Process Type** of **CalcLve**.

Note: If your leave is based on months of service, you will need to run this process prior to each payroll to be sure all leave values are up-to-date.

Fields

Date used to calculate months employed: Accept the default date or enter a date, and then click the **Calculate** button.

Calculate Carry Over: Select this check box to calculate how much leave employees have available, based on the calculation date.

Open Actions

Access this form using Activities>Open Actions.

Use this form to view all open actions for your organization. The system automatically displays all scheduled open action items; however, you can use the filter to limit which items are displayed.

Fields

Open Actions Table: This table displays all of the scheduled open actions assigned to every employee. The system displays the **EmployeeID**, **First Name**, **Last Name**, **Process Group**, **Location**, **Action Type**, **Action Date**, **Due Date**, **Cleared**, **Action Text**, **Status**, **Entered By**, **Date Entered**, **Scheduled For**, and **Scheduled** for each item. The default heading columns are listed above, but you can use the **Field Chooser** (in the first column of the table) to select other available columns not currently displayed.

Human Resources Actions are initially sorted on the first data column in ascending order. However, records can be sorted based on any column by clicking the column heading. The column on which items are sorted has (ascending order) or (descending order) in the column heading.

To group your records, use the group panel (at the top of this form) to reorganize how the form data is displayed. You can drag and drop any column heading to group them by that column heading. Click the **+** next to the group to display the detail records. To ungroup, drag and drop the column heading back to its original position.

To sort your records, click the Filter next to the column header. This displays only the subset of data that meets the criteria that you specify and hides data that you do not want displayed.

Mass Update

Access this form using Activities>Mass Update.

Use this form to update the following fields in HR Management:

Annual Salary	Department	Leave Entries
Approver	Earnings Code for Leave Entry	Location
Cost Center for OT	Form 1095-C	Manager
Default Cost Center	FTE	Salary
Default DT Earnings Code	Hourly Rate	SecSupervisor
Default Earnings Code	Job Code	Supervisor
Default Leave Cost Center	Leave Balances	Timesheet Approver
Default OT Earnings Code		

Note: An audit record is created when you perform a mass update, and you will be prompted to create a Job History record.

To perform a mass update:

Important! Back up your Abila MIP database before running any mass update process.

1. Use one of the following options to start your mass update process:
   - Start a new update process by selecting a **Field to Update** from the drop-down list and select the field you want to update. Once selected, the **Mass Update Results** section displays the associated columns.
   - Select a previously saved mass update calculation by clicking **Load** . Select the calculation you want to use, and click **Open** .
2. Click the column header for the column you want to sort.
3. Click the **New Value** field and a **Formula Builder** form displays. This is a calculation wizard.
   a. From the **Operands** tab, drill down and select the fields from the database to use to calculate the new value. Enter your calculations in the open text box.
   b. From the **Functions** tab, drill down and select the formulas to calculate the new value.
   c. Click **OK**.
4. Select the column to use as a filter and click the **Filter** . (You will see a list of available options to use for your filter.)
5. Review your preliminary results in the **After** column. You can delete rows out of the query if you want to exclude those items from the update.
6. To save this mass update formula so that you can reuse it, click **Save**, enter a **Mass Update Code ID**, and click **OK**.
7. When you are confident the results are accurate, click **Submit**.

To export the Mass Update Results table to a Microsoft Excel spreadsheet:

1. Click **Export** .
2. Select a location and enter a file name for the spreadsheet.

3. Click **Save**.

Tips:

- In Mass Update for Field to Update *Certifications*, you can select multiple records by highlighting the desired row and then clicking on the space bar.
- In the Mass Update for Field to Update *Form 1095-C*:
  - You must select a Title field before clicking in the New Value field. The Title is the name of the field on the Form 1095-C that you want to change in the Mass Update.
  - When changing the most common Title fields: *Line 14 All Months*, *Line 15 All Months*, or *Line 16 All 12 Months*, the system will update all of the month fields, for the selected Line, with the same new value.
  - Be sure to enter your New Value surrounded by single quotes ('). For example to enter 1B for the Line 14 Feb field, you will need to enter '1B' in the New Value field.
  - For the Self-insured check box, you will need to enter 'True' for a check mark and 'False' for no check mark.

Data Export

Use the **Data Export** form to push payroll information to other payroll solutions and uploading state retirement information for electronic filing. This form has two tabs, **Settings** and **Script Results**.

Note: This form is only available if the Data Import/Export module is installed.

Data Export - Settings Tab

Access this form using Activities>Data Export. It is only available if the Abila MIP Data Import/Export module is installed.

Use this form to export payroll information to other payroll solutions, using fixed width or .csv files. You can also export state requirement information for electronic filing. This form requires a SQL script to export your data. If you need a custom export specification for third-party payroll solutions, we strongly recommend that you consult your Authorized Business Partner. If you do not have a relationship with an Abila Authorized Business Partner, please contact Abila Professional Services.

Fields

Last Ran: The system displays the date and time the data was last exported.

Export ID: Enter an identifier and a description.

Status: The system defaults to **Active**. Select **Inactive** to make the **Export ID** inaccessible.

File Type: Select **CSV** or **Fixed Length**. These are the two types of files that are used for exporting.

Use Column Titles in 1st Row: Select this check box to include the column titles in the first row of the data.

BatchID: Enter a batch identifier.

Use Start and End Dates: Select this check box to set limits on the data being exported by using dates. You will need to enter **Start** and **End** dates and the data will be collected for the time period in between these two dates and include these dates.

Start: Enter the start date. This is the first day you want represented in your data export.

End: Enter the end date. This is the last day you want represented in your data export.

Header Row: Enter the header script.

SQL Script: Enter the SQL script you are using to export your data.

Footer Row: Enter the footer script. For example, you can include record subtotals, which are required for some state retirement plans.

Buttons

Export: Click this button to export the data. Before clicking this button, it is recommended that you click the **Script Results** tab and preview your data.

Exporting Payroll Information

To begin the export process, use the following steps:

1. From the **Data Export** tab, click the **New** button.
2. Enter an **Export ID** and description.
3. Select a **File Type** and enter a **Batch ID**.
4. Enter your **SQL Script**.

5. To preview your data before exporting it, click the **Script Results** tab.

6. Click the **Export** button to export the data.

Data Export - Script Results Tab

Access this form using Activities>Data Export.

Use this tab to preview your data before exporting it.

Tip: Contact your business partner or the Professional Services for information about installing and using the Abila MIP Data Import/Export module.

Notifications Log

Access this form using the Email Log button on the HR Notifications form.

Use this form to view HR Notifications that have been sent and edit the ones that have not been sent through the system. You can change the Subject and Message Text. correct To Email Addresses, and correct Error Messages.

If you clear the Email Sent check box, the message can be sent again within the next email interval.

Note: If Field Labels were used in the original HR Processes task, you cannot enter them in the Notifications Log. You will need to enter in the full information and remove the broken Field Label.

Fields

Notifications Log Table: The system displays the records by type, the associated employee ID, the type ID, the task ID, the subject and message, and to whom the notice was sent and from. The date the notice was sent. If the email was sent. Who created it. if there was a send error and what associated error message, if applicable.

- **Record Type:** The system displays the record type.
- **Employee ID:** The system displays the associated employee ID.
- **Type ID:** The system displays the record type ID.
- **Task ID:** The system displays the task ID.
- **Subject Text:** The system displays the subject line of the notification.

- **Message Text:** The system displays the message included in the notification.
- **Sent Address:** The system displays the To email address - to whom the notice was sent.
- **From Address:** The system displays the From email address - who the notice was from.
- **Send Date:** The system displays the date the notice was created or will be sent.
- **Email Sent:** The system displays if the email notice was sent. If the check box is not selected, the notice has not been sent.
- **Created:** The system displays the user who created the email notice.
- **Send Error:** The system displays if there was an error trying to send the notice. If the check box is selected, an error message will also display.
- **Error Message:** The system displays an error message if the Send Error check box was selected.

Edit Web/Imported Timesheets

Access this form using Activities>Timesheet Processing>Edit Web/Imported Timesheets.

Use this form to import .csv formatted timesheets. You are required to select your **EmployeeID** and the **Cost Center**.

Note: If you are using the Employee Web Services module for your timesheets, you will not need to complete this step.

Fields

Edit Web/Imported Timesheets Table: This table displays the timesheets entered in EWS or imported timesheets that were selected using the **Import** button. The following columns display:

EmployeeID	Earnings Code	Expense
First Name	Leave Code	Description
Last Name	Hours/Units	Approved
Process Group	Rate	Approved By
Work Date	Leave Hrs	Status
Cost Center	Amount	Error

Note: The default heading columns are listed above, but you can use the **Field Chooser** (in the first column of the table) to view and select the columns that are displayed or hidden in the table. Just click and select or clear the check box next to each available field. After you have made your selections, click the to close the Field Chooser window and apply your selections.

Include History After Calendar: Select this check box to only display timesheets that have already been processed into regular timesheets. You can reactivate timesheet entries by changing **History** to **Active** in the **Status** column based on the calendar date entered.

Tips:

- All timesheets are initially sorted on the first data column in ascending order. However, records can be sorted based on any column by clicking on the column heading. The column on which items are sorted has (ascending order) or (descending order) in the column heading.
- To sort your records, click the **Filter** next to the column header. This displays only the subset of data that meets the criteria that you specify and hides data that you do not want displayed.
- To group your records, use the group panel (at the top of this form) to reorganize how the form data is displayed. You can drag and drop any column heading to group them by that column heading. Click the **+** next to the group to display the detail records. To ungroup, drag and drop the column heading back to its original position.

Edit Web/Imported Timesheets Buttons

If available, click the button for more information about its form or process.

Import: Use this button to import .csv formatted timesheets.

Export: Use this button to export the employee timesheet data to a *.xls file format.

Save: Use this button to save any changes made on the form.

Close: Use this button to close this form with or without saving changes.

Importing Timesheets

Complete the following steps to import timesheets:

1. Open **Activities>Timesheet Processing>Edit Web/Imported Timesheets** and click the **Import** button.
   - Select the **Import Spec**. These were created using **Maintain>Timesheets Setup>Timesheet Import Specs**.
   - Select the **Purge prior to importing** check box to remove previously loaded timesheets. For example, if you load default timesheets (to make your regular timesheets) but afterwards you make many changes to the default timesheets; you would want to reload them, but you will need to purge the ones you already loaded.
   - Enter the **Purge From** and **To** dates.
   - Select OK.
2. Select the .csv file that has the timesheet information.
3. Click the **Open** button.
4. Your timesheets are now imported and available for editing.

Select Import Specs

Access this form using Activities>Timesheet Processing>Edit Web/Imported Timesheets>Import button.

Use this form to import .csv formatted timesheets.

Fields

Import Spec: Enter a .csv file or select one from the drop-down list. These were created using **Maintain>Timesheets Setup>Timesheet Import Specs**.

Purge prior to importing: Select this check box to remove previously loaded timesheets. For instance, if you load your default timesheets (to make your regular timesheets) but afterwards you make many changes to the default timesheets; you would want to reload them, but you will need to purge the ones you already loaded.

Purge From, To: Enter the **Purge From** and **To** dates. These fields are only enabled if the **Purge prior to importing** check box was selected.

Load Default Timesheets

Access this form using Activities>Timesheet Processing>Load Default Timesheets.

Use this form to select Timesheets for processing. Use the check box to select the **Processing Group**, **Pay Date**, **Period Beginning** date, and **Period Ending** date for the timesheets you want to process.

Note: When you load the timesheets, an audit record is created. You can view the process history using **Query>Run Query>Process Log**, and including the process options in the query. The load timesheets process has a **Process Type** of **LoadTS**.

Fields

Select: Select this check box to choose the row you want to load timesheets for processing.

Process Group: The processing group code. This was assigned to the employee in the Payroll module using the **Maintain>Employee** Information form. The column shows the code's name, such as **Admin** or **PartTime**.

Type: The type of timesheet, such as **Regular** or **Supplemental**. Click the drop-down list to change the type, if desired.

Pay Date: The pay date entered in the **Pay Date** table. This was assigned in the Payroll module using the **Maintain>Processing Groups>Pay Schedule** tab.

Period Beginning: The pay period beginning date. Click the drop-down list to modify the period beginning date. The **Period Beginning** date was entered in the Payroll module using the **Maintain>Processing Groups** form.

Period Ending: The pay period ending date. Click the drop-down list to modify the period ending date. The **Period Ending** date was entered in the Payroll module using the **Maintain>Processing Groups** form.

SUTA Weeks: The number of SUTA (state unemployment tax) weeks for the pay date. This is calculated in the Payroll module using the Maintain>Processing Groups form.

Show all dates for Processing Groups: Select this check box to show all dates for the processing groups.

Override Approval: Select this check box to override the approval. Note that if you have timesheets that do not have the **Approved** check box selected, and you do not override approval, these timesheets will not be included in the regular timesheets.

Purge all Reg/Sup Timesheets prior to loading: Select this check box to purge all previously loaded timesheets.

Flag Selected Timesheets as History Records: Select this check box to identify the selected timesheets as history records. This changes the status of a web/imported timesheet to **History**. It can be viewed in **Edit Web/Imported Timesheets** by checking the **View History** button.

Include active timesheets prior to this pay period: Select this check box to include any timesheets that are flagged as **Active** prior to the current pay period. This status indicates that these timesheets may require additional processing.

Use dollars earned for distribution codes: Select this check box to use dollars earned for distribution codes by default when you load regular or supplemental timesheets. You can override this setting when you edit the timesheets.

How do I Process Timesheets, using Load Default Timesheets?

Complete the following steps to process timesheets using the **Load Default Timesheets** form:

1. Select the **Processing Group** and date for the timesheets you want to process.
2. Change the **Type** of timesheet, if desired.
3. Confirm the dates for the payroll.
4. Select the options to use when loading the timesheet records:
   - If you want to purge all previously loaded timesheets, select the **Purge All Regular/Supplemental Timesheets prior to loading** check box.
   - If you want to override timesheet approval, select the **Override Approval** check box. Note that if you have timesheets that do not have the **Approved** check box selected, and you do not override approval, these timesheets will not be included in the regular timesheets.
   - If you want to select timesheets as history records, select the **Flag Selected Timesheets as History Records** check box.
   - If you want to include any timesheets that are flagged as **Active** prior to the current pay period, select the **Include active timesheets prior to this pay period**.
   - To accurately apply cost to distribution codes, select the **Use dollars earned for distribution codes** option.
5. Click the **OK** button to process the timesheets.

6. Open **Activities>Edit Regular/Supplemental Timesheets** to make any necessary edits to timesheets before continuing to the Payroll module to complete the payroll process.

Edit Regular/Supplemental Timesheets

Access this form using Activities>Timesheet Processing>Edit Regular/Supplemental Timesheets or Payroll Timesheets .

Use this form to edit the default timesheets that you selected for processing. You can modify the **Earnings** (including Overtime), **Distribution**, **Benefits**, **Deductions**, **Workers' Compensation**, and **Leave Codes** to calculate an employee's paycheck.

A table displays all of the employees to be paid, they were selected on the **Activities>Load Default Timesheets**. Click the plus sign (**+**) next to the **Type** to view and make any necessary edits to the employee's timesheet. Repeat this process for all employees entering **Earnings**, **Benefits**, **Deductions**, **Leave**, **Workers' Compensation**, **Employee Distribution**, and **Overtime Hours**.

After all of the employee timesheets have been updated, continue to the Payroll module to complete the processing of your payroll.

Note: If you have an hourly employee that has overtime, enter a new row on the Earnings Table, then select the Overtime Earnings Code, enter the number of overtime hours worked in the **Hours** columns and select the Distribution Code if different from the default. The system will automatically calculate the Rate and Amount columns after you click off the row and will update **Regular/Supplemental Timesheet** and **Earnings** information for that employee.

Fields

Regular/Supplemental Timesheets Table: This table supports the drill down feature, which allows you to view employee timesheets by processing groups.

Use this table to view the **Timesheet Type**, **Processing Group**, **Employee ID**, **First Name**, **Last Name**, **Labor Hours**, **Distribution Hours**, **Workers' Compensation Hours**, **Total Pay**, **Pay Type**, **Pay Date**, **Pay Beginning Period**, and **Pay Ending Period**.

Click the plus sign (**+**) next to the **Type** to expand the outline and enter **Earnings**, **Benefits**, **Deductions**, **Leave**, **Workers' Compensation**, **Employee Distribution**, and **Overtime Hours**. When an item has been expanded, the plus (**+**) sign becomes a minus sign (**-**). To collapse an item, simply click the minus sign.

Note: By default, only the **Earnings** information displays for the employees. To view/edit **Benefits**, **Deductions**, **Leave**, **Workers' Compensation**, and **Employee Distribution**, you will need to select the appropriate **Show** check boxes located on the bottom of the form.

Earnings Table: Use this table to view or modify the **Earning Code**, **Hours**, **Rate**, **Amount**, **Distribution Code**, **Labor Hours**, and **Total Labor Hours** for each employee. If the **OT Hours** check box is selected, you can also view/modify the employees **OT Calc**. **Total Hours** and **Gross Pay** display at the bottom of the **Earnings Table**.

Benefits Table: Use this table to view or modify the Benefit Code, Rate, and Amount for each employee. This table is available if the Benefits check box is selected in the Show box located on the bottom of the form.

Deductions Table: Use this table to view or modify the **Deduction Code**, **Rate**, and **Amount** for each employee. This table is available if the **Deductions** check box is selected in the **Show** box located on the bottom of the form.

Leave Table: Use this table to view or modify the **Leave Code**, **Rate**, **Beginning Balance**, **Hours Accrued**, **Hours Taken**, and **Ending Balance** for each employee. This table is available if the **Leave** check box is selected in the **Show** box located on the bottom of the form.

Workers Compensation Table: Use this table to view or modify the **Workers' Compensation Code**, **Rate**, and **Hours** for each employee. This table is available if the **Work Comp** check box is selected in the **Show** box located on the bottom of the form.

Employee Distribution Table: Use this table to view or modify the **Charge Hours**, **Percent**, and **Distribution Codes** for each employee. This table is available if the **Distribution** check box is selected in the **Show** box located on the bottom of the form.

Tips:

- To sort your records, click the **Filter** next to the column header.
- To group your records, use the group panel (at the top of this form) to reorganize how the form data is displayed. You can drag and drop any column heading to group them by that column heading. To ungroup, drag and drop the column heading back to its original position.

Edit Regular/Supplemental Timesheets Buttons

If available, click the button for more information about its form or process.

Load Single Employee: Use this button to add a single employee to the Edit Regular/Supplemental Timesheets form.

Calculate Formula: Use this button to modify the default Overtime Calculation using a Formula Builder. Note that this button is not available because Benefit Deduction Calculation will not work in conjunction with OT calculation. If you have a need for a more complex overtime calculation, we strongly recommend that you consult your Abila Authorized Business Partner. If you do not have a relationship with a Abila Authorized Business Partner, please contact Professional Services.

Export: Use this button to export the employee timesheet data to a *.xls file format.

Save: Use this button to save any changes made on the form.

Close: Use this button to close the form with or without saving changes.

Load Single Employee

Access this form using Activities>Timesheet Processing>Edit Regular/Supplemental Timesheets>Load button or Payroll Timesheets>Load button .

Use this form to add a single employee to the **Edit Regular/Supplemental Timesheets** form.

Fields

Employee: Select an employee from the drop-down list.

Timesheet Type: Select the timesheet type from the drop-down list, such as **Regular** or **Supplemental**.

Pay Date: The pay date entered in the **Pay Date** table. The pay date was entered in the Payroll module using the **Maintain>Processing Groups>Pay Schedule** tab.

SUTA Weeks: The number of SUTA (state unemployment tax) weeks for the pay date. This is calculated in the Payroll module using the **Maintain>Processing Groups** form.

Pay Period Begin Date: The pay period beginning date. Click the drop-down list to modify the period beginning date. The **Pay Period Begin Date** was entered in the Payroll module using the **Maintain>Processing Groups** form.

Pay Period End Date: The pay period ending date. Click the drop-down list to modify the period ending date. The **Pay Period End Date** was entered in the Payroll module using the **Maintain>Processing Groups** form.

Override Approval: Select this check box to override the approval. Note that if you have timesheets that do not have the **Approved** check box selected, and you do not override approval, these timesheets will not be included in the regular timesheets.

Flag Timesheets as History Records: Select this check box to identify the selected timesheets as history records. This changes the status of a web/imported timesheet to **History**. It can be viewed in **Edit Web/Imported Timesheets** by checking the **View History** button.

Use dollars earned for distribution codes: Select this check box to use dollars earned for distribution codes by default when you load regular or supplemental timesheets. You can override this setting when you edit the timesheets.

Include active timesheets prior to this pay period: Select this check box to include any timesheets that are flagged as **Active** prior to the current pay period. This status indicates that these timesheets may require additional processing.

Chapter 6: Built-in Reports

Use the Payroll reports to review default, regular, and supplemental timesheets for your employees; run the processing reports during a payroll cycle to verify which payroll codes are being used to calculate an employee's pay, as well as the time and amounts entered on the timesheet for a pay date range; and review an employee's pay codes history in detail or view garnishment history information.

Overview of HR Reports

The system provides numerous report selections so you can satisfy the reporting needs in your organization. This reporting gives you the flexibility you need, with grouping and sorting and offers date ranges to customize the information presented. You control the output so you get just the reports you want.

HR Reports

The following is a list of reports available for the Human Resource Management module, along with a brief description of each report.

Report Name	Description
HR>Actions>	
Actions By Due Date	The report prints scheduled actions, entered on the Details>Employee Info>Actions tab, by Due Date. The report contains Employee Last Name, First Name, Employee ID, Action Date, Due Date, End Date, Action, Notes, Scheduled For, and Status. The report is sorted in ascending order by Due Date.
Actions By Employee	This report prints scheduled actions, entered on the Details>Employee Info>Actions tab, by Employee. The report contains Action Date, Due Date, End Date, Action Type, Notes, Scheduled For, and Status, and groups the information by Employee Last Name, First Name, and Employee ID.
Actions By Type	This report prints scheduled actions, entered on the Details>Employee Info>Actions tab, by Action Type. The report contains Employee Last Name, First Name, Employee ID, Action Date, Due Date, End Date, Notes, Scheduled For, and Status and

Report Name	Description
	groups the information by Action Type.
Actions By Scheduled For	This report prints scheduled actions, entered on the Details>Employee Info>Actions tab, by Employee for whom it is scheduled. The report contains Employee Last Name, First Name, Employee ID, Action Date, Due Date, End Date, Action Type, Notes, and Status and groups the information by Scheduled For Employee ID and Employee First Name, Last Name. For example, Dana Jeffries scheduled a performance review for Dave Aaron. The report groups the actions for Dana Jeffries (the person conducting the review).
Audit of Changes By Employee	This report is an audit of the changes made to an employee record by Employee ID. The report contains Action Type, Changed By, Action Date, Changed Field, Value Before Change, and After Change and groups the information by Employee Last Name, First Name, and Employee ID.
Audit of Changes By Type	This report is an audit of the changes made to an employee record by Action Type. This report contains Employee Last Name, First Name, Employee ID, Changed By, Action Date, Changed Field, Value Before Change, and After Change and groups the information by Action Type.
HR>Benefit Plans>	
Benefits By Employee	This report prints insurance benefit coverage by Employee. This report contains Benefit PlanID, Effective Date, Expiration Date, Plan Option, Monthly Premium, Employer's Cost, Employee Contribution, and Other Amount and groups the information by Employee Last Name, First Name, and Employee ID. This report includes Employee Totals for Monthly Premium, Total Employer's Cost, Total Employee Contribution, and Total Other Amount.
Benefits By Plan	This report prints insurance benefit coverage by Benefit Plans. This report contains Employee Last Name, First Name, Effective Date, Expiration Date, Plan Option, Monthly Premium, Employer's Cost,

Report Name	Description
	Employee Contribution, and Other Amount, and groups the information by Benefit PlanID. This report includes Total Monthly Premium, Total Employer's Cost, Total Employee Contribution, and Total Other Amount by Processing Group.
Benefit Plan Totals	This report prints the Benefit Plan totals for the organization. This report contains Benefit Plan, Plan ID, Number of Expired Plans, Monthly Premium, Employer's Cost, Employee Contribution, and Other Amount. This report includes Total Premium amounts and Total Employee counts by Benefit PlanID, and as a Grand Total.
Health Care Compliance	This report prints the average hours worked in a week when a date range is entered, for example, three months. This report contains Employee ID, Employee Last Name, First Name, Employee Type (Regular, Full Time/Part Time), Last Pay Date Worked, Total Hours worked, the number of Weeks the employee worked in the date range, and Average Hours worked per week. If you process payroll on a weekly basis, the report uses the EWS timesheet history to calculate the information.
HR>Certification>	
Certification Expiration	This report prints a list of employees who have Certifications that contain expiration dates. This report contains Employee Last Name, First Name, Employee ID, Effective Date, Expiration Date, Credit Number, and Authorization Type and groups the information by Credential Type.
HR>Compensation>	
Salary Analysis by Job Code	This report prints your organization's salary analysis by Job Code. This report contains Employee Last Name, First Name, Employee ID, Department, Pay Type, Pay Rate, Normal Hours, FTE, and Annual Salary and groups the information by Job Code. This report includes Total Employee counts, Total Annual Salary, and Average Annual Salary by Job Code.
Salary Analysis by Job Title	This report prints your organization's salary analysis by Job Title.

Report Name	Description
	This report contains Employee Last Name, First Name, Employee ID, Department, Pay Type, Pay Rate, Normal Hours, FTE, and Annual Salary and groups the information by Job Title. This report includes Totals Employee counts, Total Annual Salary, and Average Annual Salary by Job Title.
Salary Grade Exceptions	This report prints a list of salaries that are out of the salary grade range, for the Salary Grade assigned using Maintain> Job Code. This report contains Employee Last Name, First Name, Employee ID, Job Title, Process Group, Pay Type, Normal Hours, FTE, and Annual Salary and groups the information by Salary Grade Range, Pay Frequency, Minimum Salary, and Maximum Salary.
Statistics by Job Code	This report prints a summary of Job Code information. This report contains Job Code, Job Title, Employee Count, Average Annual Salary, and Total Annual Salary and groups this information by Job Code. This report includes Total Employee counts, Total Annual Salary, and Average Annual Salary.
Performance Review	This report prints the performance review fields for an employee, including Employee ID, Name, Department, Location, Job Title, Hire Date, FTE, Type, Exempt status, Overtime Eligibility status, Annual Salary, Review Date, Review Rating, Manager, Notes, wage Increase Date, Increase percentage, Next Review Date, and Employee Comments.
FTE	This reports prints the full-time equivalent rate (FTE) for each employee with their Name, Job Title, ID, Department, Hire Date, Manager, Location, Exempt status, OT eligibility, Pay Type, Pay Period, Hours, and Annual Salary. The FTE for the organization is also totaled, and the minimum FTE is displayed in the totals.
HR>Education>	
Education	This report prints the employee's education information, entered on the Details>Employee Info>Education tab. This report contains Employee Last Name, First Name, Employee ID, School name, Degree, and GPA.

Report Name	Description
Education by Job Code	This report prints the employee's education information by Job Code. This report contains Employee Last Name, First Name, Employee ID, School name, Degree, and GPA and groups the information by Job Code and Job Title.
HR>EEO Reports>	
EEO Analysis by Age	This report prints a count of the number of employees, by age group, in all EEO Levels. In order to report useful EEO information, you must have selected Gender and Ethnicity on the Details>Employee Info>Personal Tab and select a Job Code on the Details>Employee Info>Current Job tab that was assigned an EEO Class (Maintain>Job Codes) for every employee.
EEO Head Count Detail	This report prints a detailed list of employees in each EEO Class, grouped first by Gender and then by Ethnicity. This report contains Employee Last Name, First Name, Employee ID, and Job Title and groups the information first by EEO Class and Job Title, next by Gender and last by Ethnicity. This report also totals each EEO Class and includes a grand total. In order to report useful EEO information, you must have selected Gender and Ethnicity on the Details>Employee Info>Personal Tab and select a Job Code on the Details>Employee Info>Current Job tab that was assigned an EEO Class (Maintain>Job Codes) for every employee.
EEO New Hire Detail	This report prints a detailed list of employees in each EEO Class and Title, grouped first by Gender and then by Ethnicity. On the HR Dates tab, enter a Hire Date Range to determine the date of hire for new employees. This report contains Employee Last Name, First Name, Employee ID, Job Title, and Effective Date and groups the information first by Gender and then by Ethnicity. This report also totals each EEO Class and includes a grand total. In order to report useful EEO information, you must have selected Gender and Ethnicity on the Details>Employee Info>Personal Tab and select a Job Code on the Details>Employee Info>Current Job tab that was assigned an EEO Class (Maintain>Job Codes) for every employee.

Report Name	Description
EEO New Hire Summary	This report prints a summarized list of employees in each EEO Class, grouped by Ethnicity and Gender. On the HR Dates tab, enter a Hire Date Range to determine the date of hire for new employees. In order to report useful EEO information, you must have selected Gender and Ethnicity on the Details>Employee Info>Personal Tab and select a Job Code on the Details>Employee Info>Current Job tab that was assigned an EEO Class (Maintain>Job Codes) for every employee.
EEO1	This report prints a summary, listing number of employees in each EEO Class, Gender, and Ethnicity. In order to report useful EEO information, you must have selected Gender and Ethnicity on the Details>Employee Info>Personal Tab and select a Job Code on the Details>Employee Info>Current Job tab that was assigned an EEO Class (Maintain>Job Codes) for every employee.
EEO4	This report prints a summary, listing number of employees in each EEO Class, Gender, and Ethnicity. In order to report useful EEO information, you must have selected Gender and Ethnicity on the Details>Employee Info>Personal Tab and select a Job Code on the Details>Employee Info>Current Job tab that was assigned an EEO Class (Maintain>Job Codes) for every employee.
Crystal Reports	This menu is available if you have customized Crystal Reports.
HR>Leave>	
Leave Events	This report prints a detailed list of employee's currently on leave. On the HR Dates tab, enter a date range to determine the date leave was requested, the actual start leave date, the actual return date, and the scheduled return date for all leave events. This report contains Employee Last Name, First Name, Employee ID, Actual Start Date, Scheduled Return Date, and Notes.
FMLA Status	This report prints a list of employees currently on FMLA. This report contains Employee Last Name, First Name, Employee ID, Leave Type, Actual Start Date, Scheduled Return Date, Actual Return Date, Reason, and COBRA. On the HR Dates tab, enter an Actual

Report Name	Description
	Start Date and Scheduled Return Date to determine which employees are currently on FMLA.
FMLA Balances	This report prints a list of employees currently on FMLA and their hours taken. This report contains Employee Last Name, First Name, Employee ID, Leave Type, Reason, Actual Start Date, Actual Return Date, Employee Type, and Hours Away. On the HR Dates tab, enter an Actual Start Date and Actual Return Date to determine which employees are currently on FMLA. This report includes Total Hours Away and calculates the Total Hours Remaining.
Leave Balances	This report prints a detailed list of leave balances by Leave Type. On the Payroll Dates tab, enter a Check Date range to determine the date range for the leave balances. This report contains Employee Last Name, First Name, Employee ID, Vacation Service Date, Hourly Rate, Beginning Balance, Last Accrued, Last Used, Ending Balance, Leave Value, and Last Pay Date and groups by Leave Type. This report includes a Total Leave Value column.
Leave Detail	This report prints a detailed list of leave taken by Leave Type. On the Payroll Dates tab, enter a Check Date range to determine the date range for the leave taken. This report contains Employee Last Name, First Name, Employee ID, Check Date, Leave Accrued, Leave Taken, and Running Total and groups by Leave Type.
Leave Taken	This report prints a detailed list of leave taken by Leave Type. On the Payroll Dates tab, enter a Check Date range to determine the date range for the leave taken. This report contains Employee Last Name, First Name, Employee ID, Check Date, and Leave Taken and groups by Leave Type.
HR>Personnel>	
Age List	This report prints a list of employee's ages. This report contains Age, Birthday, Employee Last Name, First Name, Job Title, and Location. The report is sorted in alphabetical order by Employee Last Name.

Report Name	Description
Anniversary List	This report prints a list of employee's anniversaries by month. This report contains Hire Date, Employee Last Name, First Name, Seniority date, and Years of Service. The report is sorted in calendar order by month.
Birthday List	This report prints a list of employee's birthdays by month. This report contains Birthday, Employee Last Name, First Name, Age, and Location. The report is sorted in calendar order by month.
Company Directory	This report prints the company directory. This report contains the Employee Last Name, First Name, their Work Phone number, Email address, and Job Title. The report is sorted in alphabetical order by the Employee Last Name.
Employee Information	This report prints the employee information. This report contains the Employee ID, Employee Last Name, First Name, Home Address including City, State, Zip, Marital Status, Emergency Contact: Name, Phone, and Relationship, Home, Work, and Cell Phone numbers, Email address, Driver's License Number including State, Class and Expiration date, Job Title, Last Hire Date, Location, Department, Manager, Supervisor, and Sec Supervisor, Processing Group, Pay Status, Hourly Rate, I9 Verified check box and Date, Salary Rate, Normal Hours, FTE, and Annual Salary.
Employee Labels	This report prints employee home address mailing labels and are sorted by the Employee Last Name.
Employee Labels Zip	This report prints employee home address mailing labels and are sorted by ZIP Code.
Employee List	This report prints a list of the employees including Employee ID, Title, Location, and Processing Group. This report includes Total Employee counts.
I-9 Verification	This report prints employees by I9 verification by verified or not. This report contains the Employee Last Name, First Name, Employee ID, Job Title, Location, Processing Group, and I9 Verification. (This was selected on the Details>Employee Info>Personal tab). This report includes Total Employee counts.

Report Name	Description
Job Anniversary List	This report prints a list of employee's job anniversary by month/. This report contains Job Start Month, Day, Employee Last Name, First Name, Hire Date, Job Start Date, and Years in Job. This report is sorted by Employee Last Name.
Job Code Assignments	This report prints employees by job code assignments. This report contains the Employee Last Name, First Name, Employee ID, Hire Date, Job Start Date, Processing Group, Location, and Department and groups by Job Code ID and description.
Open Positions	This report prints a list of positions defined in Maintain>Job Codes that are not assigned to an active employee. This report contains the Job Code ID, Job Code Title, Salary Grade, Minimum Salary, and Maximum Salary.
Organization	This report prints the organization information by Managers and their assigned employees. This report contains the Employee Last Name, First Name, Hire Date, Job Title, Location, and Department and groups this information first by Manager and then by Supervisor. This report includes Manager Staff Counts and Supervisor Staff Counts.
Managers	This report prints a list of Managers and their assigned employees. This report contains the Employee Last Name, First Name, Hire Date, Job Title, Location, and Department and groups the information by Manager. The report includes a Manager Staff count.
Supervisors	This report prints a list of Supervisors and their assigned employees. This report contains the Employee Last Name, First Name, Hire Date, Job Title, Location, and Department and groups the information by Supervisor. The report includes a Supervisor Staff count.
Work Phone List	This report prints a work phone list for employees. This report contains the Employee Last Name, First Name, Work Phone number, Title, Location, and Department. This report is sorted in alphabetical order by Employee Last Name.

Report Name	Description
Web Settings	This report contains a detailed list, per employee, of the settings entered on all of the tabs of the Maintain>Timesheet Setup>Employee Timesheet Settings form. This report contains the Employee Last Name, First Name, Employee ID, Hire Date, Manager, Job Title, Department, and Location, and groups the information by Employee.
HR>Processes>	
Process List	This report contains a detailed list of the HR Processes for all of the Process Type and Task Options entered on the Maintain>HR Processes form. This report contains the Process Name, Title, Department, Location, New Hire, Job Change, Pay Change, FMLA, and Term, as well as, Order, Title, Process Group, Department Description, Location, Required, HR, Manager, Supervisor and Other. The information is grouped by Process Name.
Process by Employee	This report contains a detailed list of the HR Processes per employee for all of the processes assigned on the Details>Employee Info>HR Processes tab. This report contains the Employee Last Name, First Name, Employee ID, Process Type, Date Assigned, Task, Completed, Date Completed, Required, Web Approval or not, the Title of approver, their Last Name, First Name, and Date Approved.
HR>Vet 100>	
Vets 100 Detail	This report contains a detailed list of Employee Names and Veterans information, including Special Disabled Veterans, Vietnam Era Veterans, Other Protected Veterans, Medal Veterans, and denotes if they are hired in the previous 12 months.
Vets 100 Summary	This report is a summary of totals which include a detailed list of Employee Names and Veterans information, including Special Disabled Veterans, Vietnam Era Veterans, Other Protected Veterans, Medal Veterans, and denotes if they are hired in the previous 12 months.
HR>Termination>	

Report Name	Description
Terminated Employee Log	This report lists terminated employees. This report contains Employee Last Name, First Name, Employee ID, Job Title, Processing Group, Pay Status, Termination Date, Type, and Reason, Employee Hire Date, Employee Type, Longevity, Hours per pay period, Pay Rate, Pay Type, and Annual Salary and groups the information by Employee Last Name, First Name, and Employee ID. The report includes an Average Annual Salary, Total Annual Salary, and Total number of employees Terminated.
Terminated Statistics	This report prints statistical employee turnover information. The report contains Termination Type, Termination Date, Employee Last Name, First Name, Employee ID, Job Title and Service Length and groups the information by Termination Type. The report includes a total employee count for each Termination Type.

Payroll Reports

The following is a list of reports available for the Human Resource Management module, along with a brief description of each report.

Report Name	Description
Payroll>Timesheets>	
Timesheets Default, Regular, or Supplemental	This report prints Default Timesheet information per Employee. The reports contains Employee First Name, Last Name, Employee ID, Employee Type, Pay Type, Location, Department, Code ID, Hours, Rate, Amount, Current Balance, and Distribution Codes (if applicable) and groups the information by Benefits, Deductions, Earnings, Leave, and Workers' Compensation.
Timesheet Summary	This report prints Default Timesheet information such as Earnings, Benefits, Deductions, Leave, and Workers' Compensation and displays the Employee ID, Employee First Name, Last Name, Hours, Rate, Amount, and Distribution Code (if applicable) and groups the information by Code ID.
Timesheet Distribution	This report prints distribution of Earnings in Regular/Supplemental Timesheets by Employee First Name, Last Name, Employee ID, Employee Type, Pay Type Location, Department, Distribution Code, Cost Center number, Hours/Units, Rate, Percent, and Amount and groups the information by Processing Group. This report includes an Earnings Code Totals and Employee Totals for Hours/Units and Amount.
Web Expense Report	This report prints employee expenses. The report contains Expense Date, Cost Center, Expense Code, Miles, Rate, Amount, Description, and Approved. This report includes Total for Cost Center, as well as a grand total for Miles and Amount.
Web Expense Report Signoff	This report prints an employee expense report. The report contains Expense Date, Cost Center, Expense Code, Miles, Rate, Amount, Description, and Approved. This report includes totals for Miles and Amount, along with an Employee and Manager signature lines.
Web Timesheets	This report prints Web Timesheet Detail information per Employee

Report Name	Description
	without clock in/out times. The report contains Employee Last Name, First Name, Employee ID, Pay Type, Processing Group, Department, Location, Work Date, Cost Center, Earnings (Code ID and Hours), Leave (Code ID and Hours), Description, and Approved. This report includes Employee Totals.
Web Timesheet Summary	This report prints Default Web Timesheet summary information including Employee ID, Employee Name, and Hours.
Web Timesheets Signoff	This report prints a Sign-off sheet for the Manager and each Employee to sign. The report contains Employee Last Name, First Name, Employee ID, Pay Type, Processing Group, Department, Location, Work Date, Cost Center, Earnings (Code ID and Hours), Leave (Code ID and Hours), Description, and Approved. This report includes Employee Totals, along with a Manager and Employee signature lines.
Web Timesheets by Cost Center	This report prints a summary of cost center information. This report contains Employee First Name, Last Name, Employee Type, Pay Type, Location, Department, and Hours/Units. This report includes Totals for Hours/Units and a Grand Total for all cost centers.
Web Timeclock Detail	This report prints Web Timesheet Detail information, including clock in/out times per page for each Employee. The report contains Employee ID, Employee Last Name, First Name, Pay Type, Processing Group, Department, Location, Work Date, Cost Center, Earnings (Code ID and Hours), Leave (Code ID and Hours), Description, and Approved. This report includes Employee Totals.
Invalid Account Code Combinations	This report only prints if you have Account Code Combinations setup and have invalid account code combinations. The report contains summary information including Cost Center, Used in Current Timesheets, Account Code, Used in Earnings, Used in Leave, and Used in Expenses. It is recommended that you run this report before processing payroll.
Payroll>Processing>	

Report Name	Description
Calculation Cross Tab	This reports prints the payroll history detail information for each employee by Pay Code Type and includes each Pay Code and Amount. This report contains Employee ID, Employee First Name, Last Name, Pay Code Type, Pay Codes, and Amount.
Calculated Garnishments	This report prints the calculated garnishment history detail information for each employee.
Garnishment Info	This report prints the garnishment information, for each employee, entered on the Details>Employee Info>Garnishments Tab. This report contains Employee ID, Employee First Name, Last Name, Department, Location, Job Title, Hire Date, Priority Type, Order Date, End Date, Amount, Percentage, Max Amount, Deduction Code, Creditor Name, and Contact Phone.
Payroll>History>	
History Cross Tab	This report prints the payroll history detail information within a specified date range for each employee by Pay Code Type and includes each Pay Code and Amount. This report contains Employee ID, Employee First Name, Last Name, Pay Code Type, Pay Codes, and Amount.
Garnishments History	This report prints the garnishment history information within a specified date range for each employee.

Chapter 7: Query

Use the Query form to run queries on anything in the HR Management and Payroll modules.

Run Query

Access this form using Query>Run Query.

Use this form to run queries to report on anything in the Human Resource Management and Payroll modules, such as Actions, Benefit History, Benefit Plans, Cost Centers, Credentials, Deduction History, Dependent Benefits, Dependents, Earnings History, Education, Employee Info, Form 1095-C, Garnishments, HR Processes, Job History, Leave History, Leave Request, Notifications Log, Other Tax Info, Payroll History, Performance Review, Process Log, Timesheets, Web Timesheets Log, Web Timesheet Submit Log, Web Timesheets, and Work Comp History.

Fields

Query Drop-Down List: Select one of the following to begin building your query: Actions, Benefit History, Benefit Plans, Cost Centers, Credentials, Deduction History, Dependent Benefits, Dependents, Earnings History, Education, Employee Info, Form 1095-C, Garnishments, HR Processes, Job History, Leave History, Leave Request, Notifications Log, Other Tax Info, Payroll History, Performance Review, Process Log, Timesheets, Web Timesheets Log, Web Timesheet Submit Log, Web Timesheets, and Work Comp History.

Active Employees Only: Select this check box to only display active employees.

From: Select the default date or enter a beginning date. This will filter your data records to display only the information that is within the date range.

To: Select the default date or enter an ending date. This will filter your data records to display only the information that is within the date range.

Select Criteria: After you have selected a group of information from the Query Drop-Down list, the appropriate fields display. Select the check box to include the field information in the Query Table.

Query Table: This is where the selected criteria of the query displays.

How Do I Run a Query?

Complete the following steps to run a query:

1. In the **Query** form, select the group of information that you want to query using the drop-down list.
2. Select the **Active Employees Only** check box, or clear this check box to see all employees.
3. Check the box next to any fields you want to include in your query.
   - To sort your records, click the Filter next to the column header.
   - To group your records, drag and drop the grouping field to the top of the form.
4. Use the **Excel** button Excel to export your query to Excel.
5. Use the **Save Layout** button Save Layout to save a query format.
6. Use the **Load Layout** button Load Layout to open a saved query.

Run Query Buttons

Load Layout	**Load Layout:** Use this button to open a saved query.
Save Layout	**Save Layout:** Use this button to save the query format.
Excel	**Excel:** Use this button to export the query data to a *.xls file format and open it into Microsoft Excel.
Print	**Print:** Use this button to print the query.

Chapter 8: Options

Use the Options forms to set up system -wide preferences for saving table layouts, user-defined field setups, and automatic mapping of Class and Position fields.

Preferences

Access this form using Options>Preferences.

Use this form to customize table layout saving options and reset the User ID password.

Fields

Grid Options

- **Save Layout on Exit:** Select this check box to save your form settings—the size and/or position of a form or the width or order of columns. The next time you open the form, it is the same size and position when you last opened it.

  Note: Save Layout on Exit also saves the current view of the **Payroll Timesheets**  form. Any subentries that are selected will be shown the next time you launch the form.

- **Reset Layouts:** Click this button to reset the column width and column order to the original system default for all forms.

User Credentials

User ID: The system displays the User ID.

Change Password: Click this button to assign a new password or change an existing password for both the Abila MIP and HR Management systems.

User Password

Access this form using the Options>Preferences>Change Password button.

Use this form to assign a new password or change an existing password for both the Abila MIP and HR Management systems.

If the Force Password Reset check box is selected using Abila MIP>Options>System Preferences, the system will require that users change their password within the number of days defined.

Fields

Old Password: Enter the user's existing password, so it can be changed to a new password.

New Password: Enter a new password. The system displays asterisks as it is entered.

Confirm: Retype the new password to confirm it.

Field Setup

Use the Field Setup form to set up User Defined Fields.

Field Setup - Credential Text Tab

Access this tab using Options>Settings>Field Setup.

Use this form to set up multiple User Defined Fields (UDF) for the **Details>Employee Information>Certification** and **Education** tabs. Be sure to click the **Save** button once all of the Field Setup tabs are completed, if applicable. See Credential Field Masking for entering field masking when creating credential text.

Use this tab to create **Drop-Down List UDF** field types for the **Details>Employee Information>Certification** tab.

Fields

Standard Fields Dropdown1, Dropdown2, Text 1: Enter the name of the field you want to be added to the **Details>Employee Information>Certification** tab.

Show fields for employee name on credential if name is different: Select this check box to show the employee name on the **Credential** field if the name is different than the employee's current last name.

Optional Fields Cred01 - Cred20: Enter the **Title** and **Mask Edit** to create a drop-down field on the **Details>Employee Information>Certification** tab; you can create up to 20 fields. Remember to set up the codes for the drop-down list using **Maintain>Code** Table.

Field Setup - Credential Yes/No Tab

Access this tab using Options>Settings>Field Setup.

Use this tab to create UDF field types of **Yes/No** check boxes for the **Details>Employee Information>Certification** tab. Be sure to click the **Save** button once all of the Field Setup tabs are completed, if applicable.

Fields

Optional Fields Cred01 - Cred60: Enter the **Title** to create a **Yes/No** check box on the **Details>Employee Information>Certification** tab; you can create up to 60 fields.

Field Setup - Credential Dates Tab

Access this tab using Options>Settings>Field Setup.

Use this tab to create **Date** UDF field types for the **Details>Employee Information>Certification** tab. Be sure to click the **Save** button once all of the Field Setup tabs are completed, if applicable.

Fields

Optional Fields Cred01 - Cred05: Enter the **Title** to create a **Date** field on the **Details>Employee Information>Certification** tab; you can create up to five fields.

Field Setup - Education Text Tab

Access this tab using Options>Settings>Field Setup.

Use this tab to create **Text** UDF field types for the **Details>Employee Information>Education** tab. Be sure to click the **Save** button once all of the Field Setup tabs are completed, if applicable.

Fields

Optional Fields Edu01 - Edu05: Enter the **Title** to create a **Text** field on the **Details>Employee Information>Education** tab; you can create up to five fields.

Field Setup - Education Yes/No Tab

Access this tab using Options>Settings>Field Setup.

Use this tab to create UDF field types of **Yes/No** check boxes for the **Details>Employee Information>Education** tab. Be sure to click the **Save** button once all of the Field Setup tabs are completed, if applicable.

Fields

Optional Fields Edu01 - Edu05: Enter the Title to create a **Yes/No** check box on the **Details>Employee Information>Education** tab; you can create up to five fields.

Credential Field Masking

The input mask can consist of the following characters:

Character	Description
#	Digit placeholder. Character must be numeric (0-9) and entry is required.
.	Decimal placeholder. The actual character used is the one specified as the decimal placeholder by the system's international settings. This character is treated as a literal for masking purposes.
,	Thousands separator. The actual character used is the one specified as the thousands separator by the system's international settings. This character is treated as a literal for masking purposes.
:	Time separator. The actual character used is the one specified as the time separator by the system's international settings. This character is treated as a literal for masking purposes
/	Date separator. The actual character used is the one specified as the date separator by the system's international settings. This character is treated as a literal for masking purposes.
\	Treat the next character in the mask string as a literal. This allows you to include the '#', '&', 'A', and '?' as well as other characters with special meanings in the mask. This character is treated as a literal for masking purposes.
&	Character placeholder. Valid values for this placeholder are ANSI characters in the following ranges: 32-126 and 128-255 (keyboard and foreign symbol characters).

Character	Description
>	Convert all the characters that follow to uppercase.
<	Convert all the characters that follow to lowercase.
A	Alphanumeric character placeholder. For example: a-z, A-Z, or 0-9. Character entry is required.
a	Alphanumeric character placeholder. For example: a-z, A-Z, or 0-9. Character entry is not required.
9	Digit placeholder. Character must be numeric (0-9) but entry is not required.
-	Minus sign when followed by a number section defined by series of 'n's (like in "-nn,nnn.nn") indicates that negative numbers are allowed. When not followed by a series of 'n's, it's taken as a literal. Minus sign will only be shown when the number is actually negative.
+	Plus sign when followed by a number section defined by series of 'n's (like in "-nn,nnn.nn") indicates that negative numbers are allowed. However, it differs from '-' in the respect that it will always show a '+' or a '-' sign depending on whether the number is positive or negative.
C	Character or space placeholder. Character entry is not required. This operates exactly like the '&' placeholder, and ensures compatibility with Microsoft Access.
?	Letter placeholder. For example: a-z or A-Z. Character entry is not required.
n	Digit placeholder. A group of n's can be used to create a numeric section where numbers are entered from right to left. Character must be numeric (0-9) but entry is not required.
mm, dd, yy	Combination of these three special tokens can be used to define a date mask. mm for month, dd for day, yy for two digit year and yyyy for four digit year. Examples: mm/dd/yyyy, yyyy/mm/dd, mm/yy.
hh, mm, ss, tt	Combination of these three special tokens can be used to define a time mask. hh for hour, mm for minute, ss for second, and tt for AP/PM. Examples: hh:mm, hh:mm tt, hh:mm:ss.

Character	Description
{date}	**{date}** token is a place holder for short date input. The date mask is derived using the underlying culture settings.
{time}	**{time}** token is a place holder for short time input. Short time typically does not include the second's portion. The time mask is derived using the underlying culture settings.
{longtime}	**{longtime}** token is a place holder for long time input. Long time typically includes the second's portion. The long time mask is derived using the underlying culture settings.
{double:i.f:c}	**{double:i.f:c}** is a place holder for a mask that allows floating point input where **i** and **f** in **i.f** specify the number of digits in the integer and fraction portions respectively. The **:c** portion of the mask is optional and it specifies that the inputting of the value should be done continuous across fraction and integer portions. For example, with **:c** in the mask, in order to enter 12.34 the user types in "1234". Notice that the decimal separator character is missing. This alleviates the user from having to type in the decimal separator.
{double:-i.f:c}	Same as **{double:i.f:c}** except this allows negative numbers.
{currency:i.f:c}	Same as **{double:i.f:c}** except the mask is constructed based on currency formatting information of the underlying format provider or the culture. It typically has the currency symbol and also displays the group characters.
{currency:-i.f:c}	Same as **{currency:i.f:c}** except this allows negative numbers.
Literal	All other symbols are displayed as literals; that is, they appear as themselves.

You can also escape the mask with {LOC} character sequence to indicate that symbols in the following table should be mapped to the associated symbols in the underlying culture settings.

Character	Description
$	Currency symbol.
/	Date separator.

Character	Description
:	Time separator.
,	Thousands separator.
.	Decimal separators.
+	Positive sign.
-	Negative sign.

System Preferences

Access this form using Options>Settings>System Preferences.

Use this form to automatically map the **Class** and **Position** fields.

Fields

Map Class Field: Select **<Blank>**, **Department**, **Location**, or **Supervisor** from the drop-down list to automatically update the Class field (**Details>Employee Info>Current Job**) to reflect the entry in the **Department**, **Location** or **Supervisor** field.

Map Position Field: Select **<Blank>**, **Job Code**, or **Job Title** from the drop-down list to automatically update the Position field (**Details>Employee Info>Current Job**) to reflect the entry in the **Job Code** or **Job Title** field.

Disable Action Records: Select this check box to disable the automatic generation of Action Records (**Details>Employee Info>Actions**). This is recommended if you are setting up your database for the first time.

Build Distribution using Dollars Earned: If you use shift differential pay options, overtime, or a combination of earning rates, select this check box to make distributions based on the dollars earned in a pay period rather than on the hours worked. You can override this setting if necessary by using the **Use dollars earned for distribution codes** check box when you load or edit the timesheets.

HR Contact

Name: Enter the Human Resource contact's name.

Phone: Enter the Human resource's phone number

Email: Enter the Human resource's email address. If using HR Notifications, this email address is use as the From email address.

Process Group Setup

Access this form using Options>Settings>Process Group Setup.

Use this form to modify the number of hours in a pay period or the number of pay periods in a year by processing group if they do not conform to a 40 hour work week or 52 weeks calendar year pay cycle but want 100 percent coverage. For example, if you have a processing group that’s full time but has a work week of 37 hours. Your change will set the **FTE Rate** to 100% for a 37 hour work week. Also, if you have a processing group that does not work 12 months of the calendar year. Your change will set the **FTE Rate** to 100% for a 10-month work year.

These changes will affect the **FTE Rate** displayed on the **Details>Employee Info>Current Pay** tab.

Enter the **Normal Hours per Pay Period** and the **Number of Regular Payroll** for each Processing Group that does not conform to a 40-hour work week in a 52-week pay cycle per year.

Fields

Process Group: The system displays the processing group available in the system. This was assigned to the employee in the Payroll module using the **Maintain>Employee Information** form. The column shows the code's name, such as **Admin** or **PartTime**.

Pay Cycle: The system displays the pay cycle. This was assigned to the employee in the Payroll module using the **Maintain>Employee Information** form. The column shows the code's name, such as **W (Weekly)**, **B (Biweekly)**, **S (Semimonthly)**, or **M (Monthly)**.

Normal Hours per Pay Period: Enter the number of hours the employees in the Processing Group normally work during a Pay Period. The system defaults to 40 hours weekly and 80 hours biweekly.

Number of Regular Payrolls: Enter the number of regular pay cycles the employees in the Processing Group normally work. The system defaults to 52 payrolls weekly and 26 payrolls biweekly.

Chapter 9: Help Resources

Use the **Help** forms to access the online help system, check for system updates, update your activation code and license allocations, and to view the What's New document.

Contents and Index

Access the online help system using Help>Contents or Help>Index.

The help is divided into two panes: the navigation pane and the topic pane. The Contents tab of the navigation pane displays menu items in a collapsed ( ) format. By expanding ( ) any topic, you can view the subtopics available for each menu selection. You can also use the Index and Search tabs to quickly find topics and save shortcuts to your most frequently visited topics.

- If you want to print a topic from the User's Guide, click the topic, then select **File>Print** from the top menu.
- Remember, you can use the right-click menu throughout the help system to perform a variety of tasks.

Download HR Notifications

Access this menu selection using Help>Download HR Notifications.

By choosing this menu selection, your browser is launched to the HR Notifications article on the Abila Knowledgebase page. This page outlines the link to download the HR Notifications product.

What's New

Access this menu selection using Help>What's New.

By choosing this menu selection, your browser is launched to the What's New in the HR Management page. This page outlines the newest version changes to the product.

Activation Wizard

Use the Activation Wizard to store your activation code and to allocate the employee count by database name and processing group for the HR Management and Employee Web Services modules.

Activation Wizard - Activation Code Panel

Access this tab using Help>Activation Wizard.

Use the Activation Wizard to store your activation code for the HR Management and Employee Web Services modules. The activation code is determined by the system’s license. The system uses the activation code to determine which modules you own, how many additional databases you have purchased, and how many users and employees you have available. Later, if you decide to increase your users or employees, you need to enter a new activation code. On this panel, enter the activation code you received when you purchased the HR Management module.

Fields

Serial Number: This is the unique number assigned to your system for identification purposes. If you need to refer to this serial number later, you can view it using Help>About.

Activation Code: Enter an activation code, and then click OK. The first dash of the activation code is required. The activation code is case sensitive, so it must be entered exactly as it appears on the activation card included with the system.

Tip: The activation code is case sensitive, so it must be entered exactly as it appears on the notification included with the system. (Store the activation code in a safe place in case your system needs to be reinstalled.)

Activation Wizard - License Allocation Panel

Access this tab using Help>Activation Wizard.

Use the Activation Wizard to allocate the employee count by database name and processing group for the HR and EWS modules.

The Human Resource and Employee Web Services Employee Counts display. These are associated with the employee count available in the Activation code.

On the first line of the License Allocation table, your current Database Name displays. Enter a Processing Group and the number of HR and EWS employees associated to that processing group.

On the next line, enter the database name and a different processing group. Enter the number of HR and EWS employees associated to that processing group.

Continue adding lines until you have allocated the employees, to every processing group, on every database.

Fields

Human Resource Employee Count: The HR Management employee count displays.

Employee Web Services Employee Count: The EWS employees count displays.

License Allocation: Use the following table to allocate your employee count between your databases (if multiple databases are owned) using processing groups.

- **Database Name:** Enter your database name or accept the default.
- **Process Group:** Enter a processing group.
- **HR Count**: Enter the number of employees using the Human Resource Management module in that processing group.
- **EWS Count:** Enter the number of employees using the Employee Web Services module in that processing group.

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