

Employee Tracking & Reporting by Payroll Department/Group

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| Document #: | 3081 | Product: | CenterPoint® Payroll |
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CenterPoint Payroll departments are used to group employees into logical work units for payroll processing and reporting. For example, you might have departments for office work, field work, warehouse, or any title that represents a work crew in your business.

[Step A - Create Payroll Departments/Groups](#)

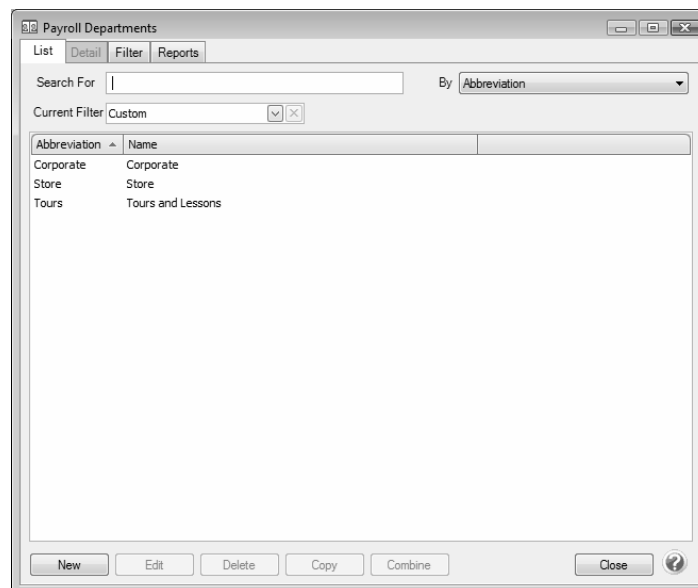
[Step B - Assign the Departments/Groups to the Employees \(optional\)](#)

[Step C - Processing Pay Runs](#)

[Step D - Generating Reports](#)

Step A - Create Payroll Departments/Groups:

1. Select **Setup > Payroll Details > Payroll Departments/Groups**.



2. Click **New**. If this department/group is similar to an existing department/group, select the similar department/group and click **Copy** instead of New.

3. Enter an **Abbreviation** and **Name** for the department/group.
4. In the optional **Supervisor** box, enter or select the supervisor responsible for department-level management/approval of employee time. If you use the online CenterPoint Time Clock, and the payroll department is assigned a Supervisor, employees assigned to the payroll department will display this supervisor in the Time Off Requests and Entered Time will be Approved by fields in the Approval section of Setup > Employees > Time Clock tab.
5. Click **Save**. Repeat step 2-5 for each department/group in your organization.

Step B - Assign the Departments/Groups to the Employees (optional)

A default department/group can be assigned to each employee. The department/group will then be assigned to the pay run transactions automatically (but can be changed) and you can group employees by department/group when doing payroll in Pay Employees. Below, we've addressed how the department/group can be assigned to one employee at a time and how to assign a department/group to multiple employees at once.

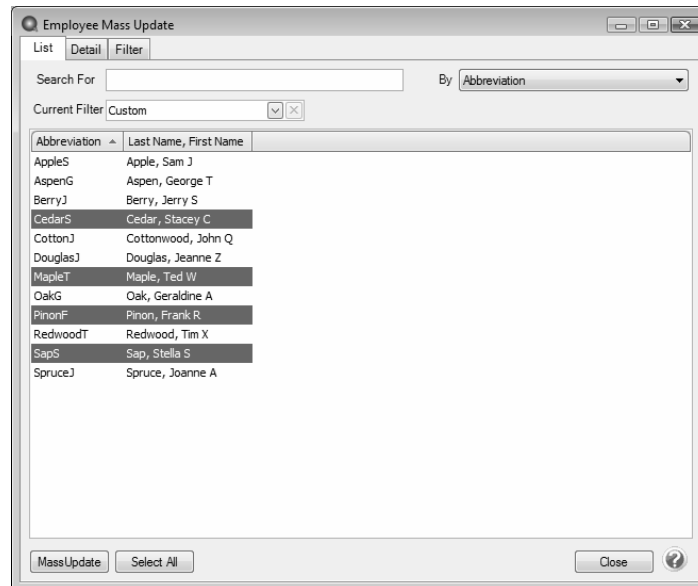
Assign a Department/Group to the Employee

1. Select **Setup > Payroll Details > Employees**.
2. Select an employee and click **Edit**.
3. Select the **Employment** tab. Enter the appropriate **Department/Group**.

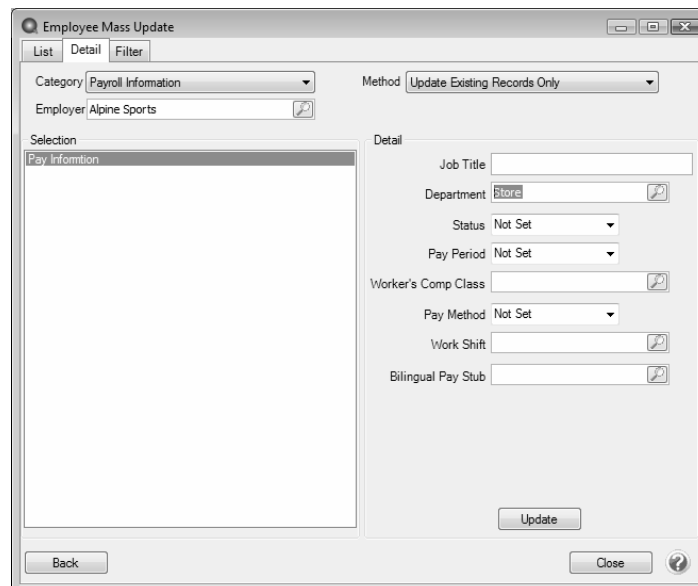
4. Click **Save**. Repeat for each employee.

Assign a Department/Group to Multiple Employees at Once

1. Select **Setup > Payroll Details > Employee Mass Update**.
2. All employees will be displayed on the List tab. Select all the employees in one department/group (select multiple employees by pressing the **CTRL** key while you make your selections).



3. Click **Mass Update** at the bottom of the screen.



4. Select **Payroll Information** in the **Category** field.
5. Select the **Employer**.
6. Select the appropriate mass update **Method**:
 - » **Update Existing Records Only** updates only employees currently assigned to the item updated.
 - » **Update Existing/Add Missing Records** updates all selected employees with the details. If the department/group is not assigned to an employee, it is added. If the department/group is currently assigned, it updates the details.
 - » **Only Add Record if Missing** updates all selected employees that currently are NOT assigned to a department/group. If the employee is currently assigned, no changes are made.
7. In the **Detail** section on the right, select the appropriate **Department/Group** for this group of employees.

8. Click **Update**.
9. The **Mass Update Review** screen will display all changes. Click **Accept** to save the changes. Click **Reject** to cancel the changes.
10. Repeat the step 2-9 for each department/group until all employees are assigned to a department/group.
11. Select **Payroll Information** in the **Category** field.
12. Select the **Employer**.
13. Select the appropriate mass update **Method**:
 - » **Update Existing Records Only** updates only employees currently assigned to the item updated.
 - » **Update Existing/Add Missing Records** updates all selected employees with the details. If the department/group is not assigned to an employee, it is added. If the department/group is currently assigned, it updates the details.
 - » **Only Add Record if Missing** updates all selected employees that currently are NOT assigned to a department/group. If the employee is currently assigned, no changes are made.
14. In the **Detail** section on the right, select the appropriate **Department/Group** for this group of employees.
15. Click **Update**.
16. The **Mass Update Review** screen will display all changes. Click **Accept** to save the changes. Click **Reject** to cancel the changes.
17. Repeat the step 2-9 for each department/group until all employees are assigned to a department/group.

Step C - Processing Payroll

If the department/group assigned to each employee is the only department/group they work in, nothing in the process you currently use to pay employees will change. Although you can use the new Filter option to select employees to be paid by department/group:

1. While selecting which employees to pay. Select the **+** button next to **Filtering**.
2. In the **Click Here to Filter List** field, select **Payroll Department/Group**. Then to the right of that field, select the department/group to be selected to be paid.

The screenshot shows the 'Pay Employees' window. At the top, there are tabs for 'List', 'Pay Employees', 'Filter', and 'Reports'. The 'Pay Employees' tab is active. Below the tabs, there are fields for 'Company' (Alpine Sports), 'Pay Date' (8/23/2010), and 'Pay Run Number' (00050). There are also buttons for '1. Select Employees', '2. Enter Pay', '3. Special Adjustments', '4. Totals', '5. Prepayment Reports', and '6. Print Checks'. The 'Pay Run Information' section includes fields for 'Company', 'Bank Account', 'Number', 'Pay Period From', 'To', 'Pay Date', 'Deduction/Benefit Frequency', '1st Pay Period of the Month', and 'Extra Frequency'. The 'Employees' section has a 'Search For' field and a 'By' dropdown menu set to 'Employee Abbreviation'. The 'Filtering' section is expanded, showing a dropdown menu with 'Payroll Department' selected. Below it, a table lists employees with columns for 'Employee Abbreviation', 'Employee Last Name, First Name', and 'Department'. The 'Department' column shows 'Store' for all listed employees. A 'Filter Applied' button is visible at the bottom right of the table area.

3. The employees displayed will then only be those assigned to that department/group. Click on the **green double arrow** to the right to select all employees in that department/group.

If your employees work in various departments/groups during the same pay period, or change departments/groups from one period to another, then you will want to specify on their pay run transactions, which hours are for each department/group. This can easily be done by adding the department/group field to the Pay

screen:

1. While on the **2. Enter Pay** tab in **Pay Employees**, right-click in the grid and select **Add/Remove Columns**.



Note: If you are using Time Sheets, this same process can be followed to add the department/group column to Time Sheets.

Pay Employees

Company: Alpine Sports Pay Date: 8/23/2010 Pay Run Number: 00050

1. Select Employees 2. Enter Pay 3. Special Adjustments 4. Totals 5. Prepayment Reports 6. Print Checks

| Employee Last Name, First Name | Net Pay |
|--------------------------------|---------|
| Oak, Geraldine A | 2884.62 |
| Redwood, Tim X | 2884.62 |
| Sap, Stella S | 0.00 |
| Spruce, Joanne A | 0.00 |

Weeks Worked: 1

Gross Earnings: 0.00 Total Hours: 0.00

Regular Earnings: 0.00

Earning / Hours / Rate / Amount / Detail

Commissions 0.00

Hourly Pay 0.00

Paid Time Off - H 0.00

Vacation - Hourly 0.00

Time Sheet Earni 0.00

Deductions: 0.00

Employee Taxes: 0.00

Employer Benefit: 0.00

Employer Taxes: 0.00

Leave Available

| Leave | Available | Used |
|---------------|-----------|------|
| Vacation | 72.00 | 0.00 |
| Paid Time Off | 163.10 | 0.00 |

Calculate Recall Options

Save Cancel Close

2. Select **Department/Group** and Click **OK**.

Adjust Displayed Columns

☒ Earning

☒ Hours

☒ Rate

☒ Amount

☒ Detail

☒ Department

☐ Offered

☐ Pieces

☐ Week

☐ Pay Default

☐ Project

☐ Work Shift

☐ Tax State

☐ SUTA State

OK Cancel

3. The normal pay screen will now include a Department/Group field where you can specify hours for each employee/department/group.

Gross Earnings

1,120.00

Total Hours

80.00

Regular Earnings

1,120.00

| Earning / | Hours | Rate | Amount | Detail | Department |
|-------------------|-------|-------|--------|--------|------------------|
| Commissions | 0.00 | 0.00 | 0.00 | | Store |
| Hourly Pay | 20.00 | 14.00 | 280.00 | | Tours and Lesson |
| Paid Time Off - H | 0.00 | 14.00 | 0.00 | | Store |
| Vacation - Hourly | 0.00 | 14.00 | 0.00 | | Store |
| Hourly Pay | 60.00 | 14.00 | 840.00 | | Store |
| | | | | | |

Time Sheet Earni

0.00

Deductions

0.00

Employee Taxes

245.89

Employer Benefit

0.00

Employer Taxes

85.99

Step D - Generating Reports

General Terms Used On Payroll Reports:

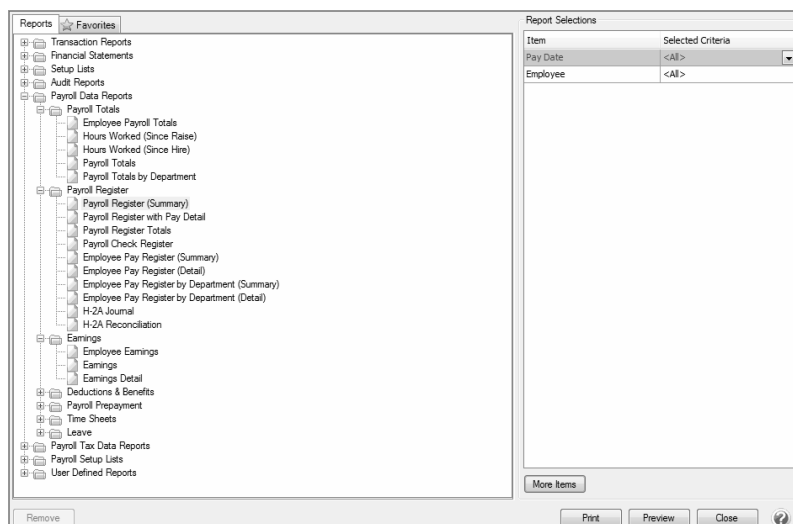
Pay Department/Group: Refers to the department/group assigned in the payroll records.

Department/Group: Refers to the department/group assigned in the employee setup.

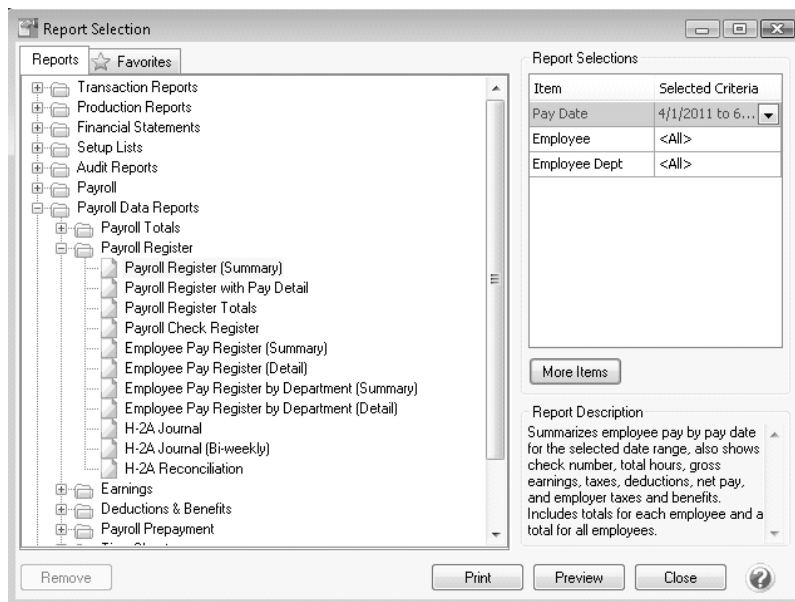
Using Department/Group as Selection Criteria on Reports

Although it's not displayed by default, department/group can be added to the selection criteria for the majority of Payroll Data Reports. The department/group shown on the Payroll Data reports is the department/group assigned to the employee. To add the selection criteria to a report:

1. After selecting Payroll Data Reports, the default Report Selections are displayed on the right.



2. If **Department/Group** is not listed, click on the **More Items** button.
3. Select **Employee Dept** and click **OK**.



Total Labor Costs by Department/Group


For payrolls where multiple departments/groups have been used for individual employees, a payroll register detail can be run that will sort the earnings by the Pay Department/Group. This example steps through applying a group/sort by pay department/group and how to filter the report by a department/group.

1. Select **Reports > Reports > Payroll Data Reports > Payroll Register > Payroll Register with Pay Detail**.
2. In the **Report Selections**, select the appropriate **Pay Date** range.
3. Select **No** for: **Include Benefits**, **Include Deductions**, **Include Employee Taxes**, and **Include Employer Taxes**.
4. Select **Yes** for: **Include Earnings** and **Include the check detail for each employee**.

| Item | Selected Criteria |
|-----------------------------------|----------------------|
| Pay Date | 02/01/10 to 02/28/10 |
| Employee | <All> |
| Include Benefits | No |
| Include Deductions | No |
| Include Earnings | Yes |
| Include Employee Taxes | No |
| Include Employer Taxes | No |
| Include the check detail for e... | Yes |
| Status | Posted |

5. Click **Preview**.
6. From the preview screen, click on the **Group & Sort** tab on the left.
 - a. Select **Pay Department/Group** and use the green up arrow to move Pay Department/Group up after Company Name.
 - b. Verify that Pay Department/Group has a check in both the **Group** and **Sort** column.
 - c. Click **Refresh**.
7. The payroll records will now be grouped and subtotaled by the department/group assigned in the pay run records.



Note: For easy access to this customized report, simply select the Favorites  button to save the customized report on the Favorites tab.