Employee Tracking & Reporting by Payroll Department/Group

Document #:	3081	Product:	CenterPoint® Payroll

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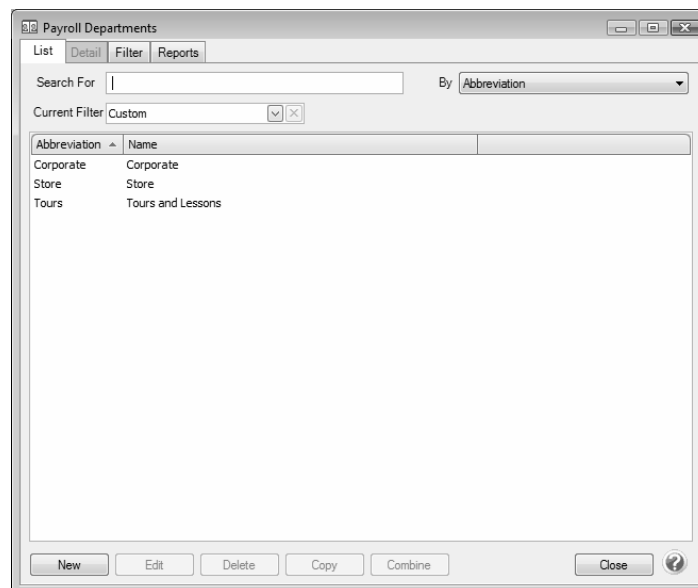
[Step A - Create Payroll Departments/Groups](#)

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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.

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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.

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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).
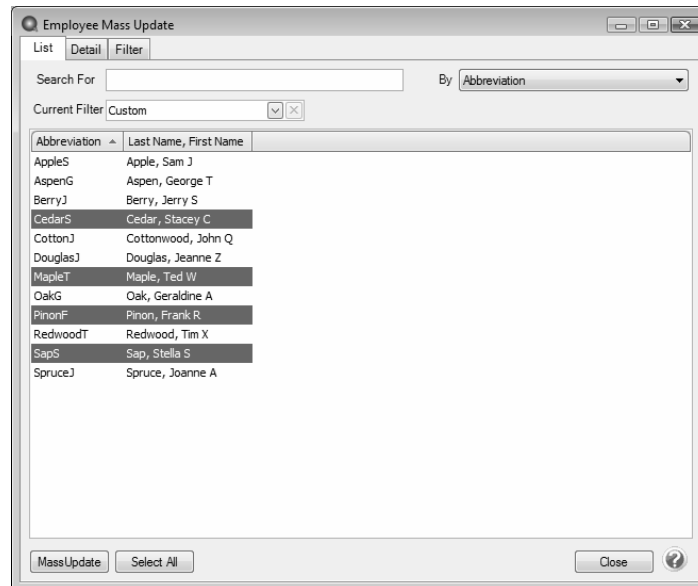
3. Click **Mass Update** at the bottom of the screen.
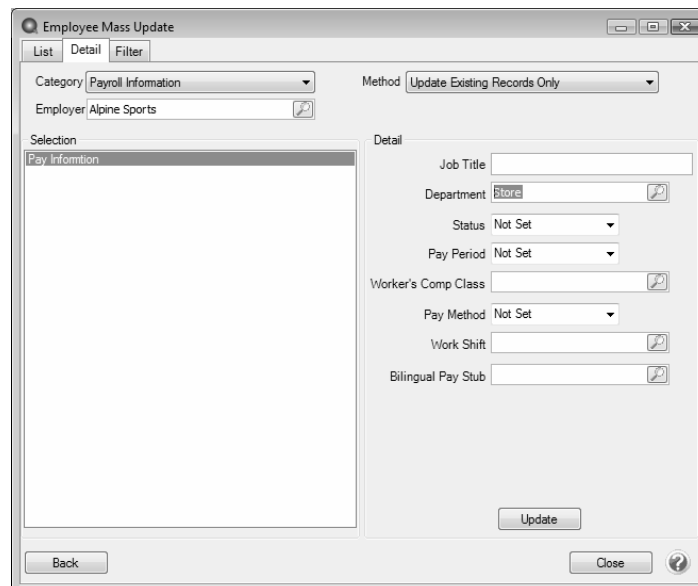
4. Select **Payroll Information** in the **Category** field.
5. Select the **Employer**.
6. Select the appropriate mass update **Method**:
   - » **Update Existing Records Only** updates only employees currently assigned to the item updated.
   - » **Update Existing/Add Missing Records** updates all 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.

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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.

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

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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.

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

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

Step D - Generating Reports

General Terms Used On Payroll Reports:

> **Pay Department/Group:** Refers to the department/group assigned in the payroll records.
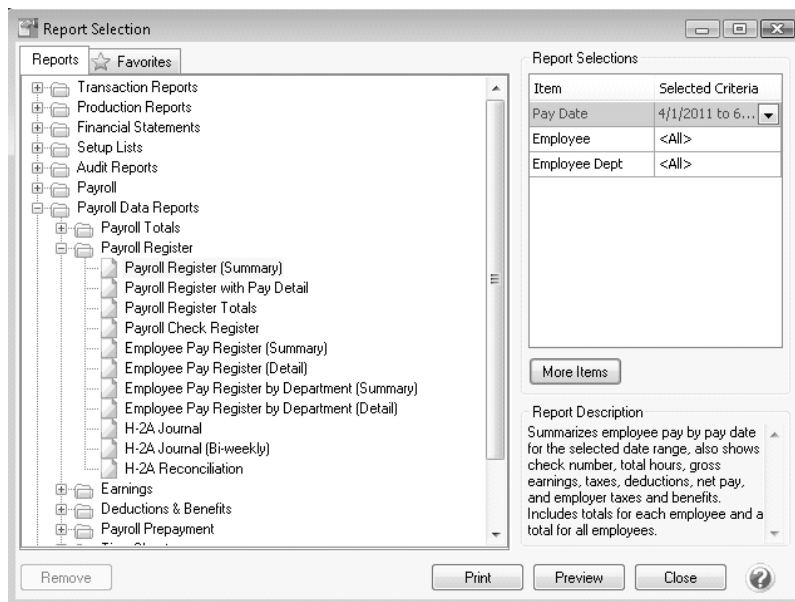> **Department/Group:** Refers to the department/group assigned in the employee setup.

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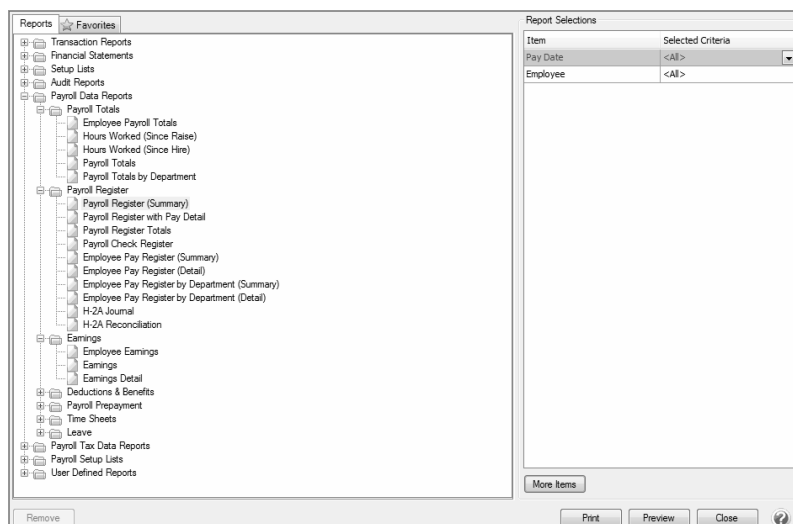
2. If **Department/Group** is not listed, click on the **More Items** button.
3. Select **Employee Dept** and click **OK**.

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**.

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.

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