

## Employee Tracking & Reporting by Payroll Department/Group

Document #	3081	Product:	CenterPoint <sup>®</sup> Payroll				
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CenterPoint Payro example, you mig business.	oll departr ht have de	nents are used epartments for	to group employees into logical work units for payroll processing and reporting. For office work, field work, warehouse, or any title that represents a work crew in your				
<u>Step A - Cr</u>	eate Payr	oll Department	s/Groups				
<u>Step B - As</u>	Step B - Assign the Departments/Groups to the Employees (optional)						
Step C - Pr	ocessing	Pay Runs					

Step A - Create Payroll Departments/Groups:

Step D - Generating Reports

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

22 Payroll Depart	tments				- • ×
List Detail F	Filter Reports				
Search For			By	Abbreviation	•
Current Filter Cu	ustom	$\checkmark$ ×			
Abbreviation A	Name				
Corporate	Corporate				
Store	Store				
Tours	Tours and Lessons				
New	Edit Delete	Copy C	ombine		Close 🕜

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.

Payroll Departments		
List Detail Filter	Reports	
New		
General		
Department Informat	ion	
Abbreviation	Active	
Name	New	
Supervisor	P	
		Additional Notes
Save	incel	Close

- 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/approvalof 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.

Employees		- • ×
List Detail Filter Reports		
Douglas, Jeanne Z.		
General Addresses Payroll Employment	Education Taxes	Earnings Deductions & Benefits Leave 🕼 🔉
Employer Selection	Employment Informa	tion
Abbreviation A Name	Supervisor	P
Alpine Spo Alpin	Job Title	Store Manager
	Department	Store 🔎
	Status	Full Time 💌
	Original Hire Date	07/14/1999
	Hire Date	07/14/1999 [#]
	Termination Date	田 Reason
	Last Raise Date	06/27/2011 III Hours to Next Raise 0
Personal Information	Forms On File	
Birth Date 11/14/1962 (王)	Resume	05/11/1999 IE Link to Document
Gender Female -	Application	1 07/05/1999
EEOC Position Executive/Senior Lvl C -	W-4 Date	09/14/2009 () Link to Document
EEOC Class White -	I-9 Date	07/14/1999 番 Link to Document
Marital Status Single 👻	Other	Link to Document
Employee Photo Link to Photo		
Save Cancel		Close 🕐

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).

C Employee Ma	ss Update			
List Detail F	filter			
Search For			By Abbreviation	•
Current Filter Cu	istom	$\mathbf{M}$ $\times$		
Abbreviation 🔺	Last Name, First Name			
AppleS	Apple, Sam J			
AspenG	Aspen, George T			
BerryJ	Berry, Jerry S			
CedarS	Cedar, Stacey C			
CottonJ	Cottonwood, John Q			
DouglasJ	Douglas, Jeanne Z			
MapleT	Maple, Ted W			
OakG	Oak, Geraldine A			
PinonF	Pinon, Frank R			
RedwoodT	Redwood, Tim X			
SapS	Sap, Stella S			
SpruceJ	Spruce, Joanne A			
MassUpdate	Select All			Close 🕜

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

C Employee Mass Update		
List Detail Filter		
Category Payroll Information	Method Update Existing	Records Only 🔹
Employer Alpine Sports		
Selection	Detail	
Pay Informition	Job Title	
	Department	Store
	Status	Not Set 👻
	Pay Period	Not Set 👻
	Worker's Comp Class	P
	Pay Method	Not Set 👻
	Work Shift	$\square$
	Bilingual Pay Stub	
		Update
Back		Close

- 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.

Company Alpine Sports	Pay Date 1	5/23/2010	Pay Run N	Number 0005	0				
Select Employees 2. Enter	Pay 3. Special Adjustments	4. Totals	5. Prepayme	ent Reports	6. Print Checks				
ay Run Information									
Company	Alpine Sports	P Pa	y Period From	08/06/2010	吞				
Bank Account	Checking	0	To	08/19/2010	Æ				
Durk Account	chooning	(Jan 1)	10	00/13/2010					
Number	00050	12	Pay Date	08/23/2010	益				
Deduction/Benefit Frequency	1st Pay Period of the Month	P Ex	tra Frequency			P			
Memo Line									
mployees Search For Filtering	) is fea						By	Employee Ab	breviation
mployees Search For Filtering Payroll Department Ind Employee Abbreviation	✓ is Store						By (	Employee Ab	breviation
mployees Search For Filtering Payroll Department and Employee Abbreviation	<ul> <li>▼ is Store</li> <li>▼ is</li> </ul>						By (	Employee Ab	breviation
mployees Search For Payroll Department and Employee Abbreviation Employee Abbreviation + En	is Store     is     is     ployee Last Name, First Name	b Departmen		Employee	Abbreviation 🔺	Employee Last	By (	Employee Ab	breviation • ¶ 
mployees Search For Payroll Department Imployee Abbreviation Employee Abbreviation + Et AppleS Af	is Store is is nployee Last Name, First Name ple, Sam J	Departmen Store	nt^	Employee	Abbreviation 🔺	Employee Last	By (	Employee Ab	breviation • 9 G Department
Search For Search For Payroll Department Imployee Abbreviation File Employee Abbreviation + Et AppleS AppleS	is Store is is playee Last Name, First Name play, Sam J uglay, Jearne Z uglay, Jearne Z	Department Store Store		Employee	Abbreviation A	Employee Last	By (	Employee Ab	breviation G Department
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mployees           Search For           Filtering           Payroll Department           Employee Abbreviation           Rest           Spid           Outplace           Payroll           Spid           Outplace           SpipS	is Store     is sis     is sis     is sis     is, sis     is, sis     is, sis, s	Department     Store     Store     Store     Store     Store     Store		Employee	Abbreviation A	Employee Last	By (	Employee Ab	breviation P G Department
mployees Search For Planting	is Store     is Store     is	Department Store Store Store Store Store Store		Employee	Abbreviation A	Employee Last	By (	Employee Ab	breviation • 9 G Department
mployees Search For PyroII Department Employee Abbreviation Employee Abbreviation Employee Abbreviation Employee Abbreviation Employee Abbreviation Employee Abbreviation Abbreviation Abbreviation Content of the Abbreviation Ab	is Store is playse Last Name, First Name plays, Jearne Z My Geraldane A dwood, Tim X p, Stella S ruce, Joanne A ii	Department     Store     Store		Employee	Abbreviation A	Employee Last	By (	Employee Ab	breviation P G Department
mployees Search For Payroll Department Employee Abbreviation Employee Abbreviation Employee Abbreviation Employee Abbreviation Employee Abbreviation Payrol	is Store     is signal content of the second s	Department     Store     Store	Titler App	Employee	Abbreviation A	Employee Last	By (	Employee Ab	breviation P G Department

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		- • ×
List Pay Employees Filter Reports		
Company Alpine Sports Pa	y Date 8/23/2010 Pay Run Number 00050	
1. Select Employees 2. Enter Pay 3. Special Ar	djustments 4. Totals 5. Prepayment Reports 6. Print Checks	
Employee Last Name, First Name 🔺 Net Pay		
Oak, Geraldine A 2884.62	Weeks Worked 1	
Redwood, Tim X 2884.62	Gross Earnings 0.00 Total Hours 0.00	
Sap, Stella S 0.00	Beaular Faminos 0.00	
Spruce, Joanne A 0.00		
	Completions Add/Remove Columns	
	Hourly Pay 01 a so t	
	Paid Time Off - H 0.1	
	Vacation - Hourly 0.1 Delete Row	
	Set Artise Fields	
	Time Sheet Earni U.UU	
	Deductions	
	Employing Taxing 0.00	
Leave Available	Employee raxes 0.00	
Leave Available / Used	Employer Benefit U.UU	
Vacation 72.00 0.00	Employer Taxes 0.00	
Paid Time Off 163.10 0.00		
Detail	Calculate Recall Options 🔻	
Save Cancel		Close 👔

2. Select Department/Group and Click OK.

Adjust Displayed Columns		x
	_	
Eaming	<b>^</b>	
V Hours		
Rate		
Amount		_
V Detail	Ξ	
Department		_
Coffered		
Pieces		
Week 📃		
Pay Default		
Project		
🔲 Work Shift		
Tax State		
SUTA State	Ŧ	
OK Cancel		

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

Earning         Hours         Rate         Amount         Detail         Departme           Commissions         0.00         0.00         0.00         Store           Hourly Pay         20.00         14.00         280.00         Tors and Le           Vacation - Hourly Pay         0.00         14.00         0.00         Store           Vacation - Hourly         0.00         14.00         0.00         Store           Time Sheet Earni         0.00         14.00         840.00         Store           Deductions         0.00         14.00         840.00         Store           Employee Taxes         245.89         Employer Benefit         0.00           Employer Taxes         85.99         85.99         Store	e Re	egular Earning	gs	1,120.00				
Commissions         0.00         0.00         0.00         Store           Houfy Pay         20.00         14.00         280.00         Tours and Le           Paid Time Off - H         0.00         14.00         0.00         Store           Vacation - Hourly 0.00         14.00         0.00         Store           Time Sheet Earni         0.00         14.00         840.00         Store           Time Sheet Earni         0.00         Employee Taxes         245.89         Store           Employer Taxes         85.99         85.99         Store         Store		Earning	- Z	Hours	Rate	Amount	Detail	Department
Hourly Pay         20.00         14.00         280.00         Tours and Le           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         0.00         Store           Time Sheet Earni         0.00         14.00         840.00         Store           Deductions         0.00         Employee Taxes         245.89         Employer Taxes         85.99		Commissio	ns	0.00	0.00	0.00		Store
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         14.00         840.00         Store           Deductions         0.00         Employee Taxes         245.89         Employer Taxes         85.99		Hourly Pay		20.00	14.00	280.00		Tours and Lessor
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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		Vacation - H	lourly	0.00	14.00	0.00		Store
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Time Sheet Earni     0.00       Deductions     0.00       Employee Taxes     245.89       Employer Benefit     0.00       Employer Taxes     85.99								
Deductions     0.00       Employee Taxes     245.89       Employer Benefit     0.00       Employer Taxes     85.99	Ti	me Sheet Ear	ni	0.00				
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Employer Taxes 85.99	Emplo	yer Benefit		0.00				
	Emplo	yer Taxes		85.99				

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## 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.

Report Selections	
Item	Selected Criteria
Pay Date	02/01/10 to 02/28/10
Employee	<all></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.