



Salary Wizard

TKSQL

TKSQL 2013.01 SP2
March 31, 2013

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1 Overview

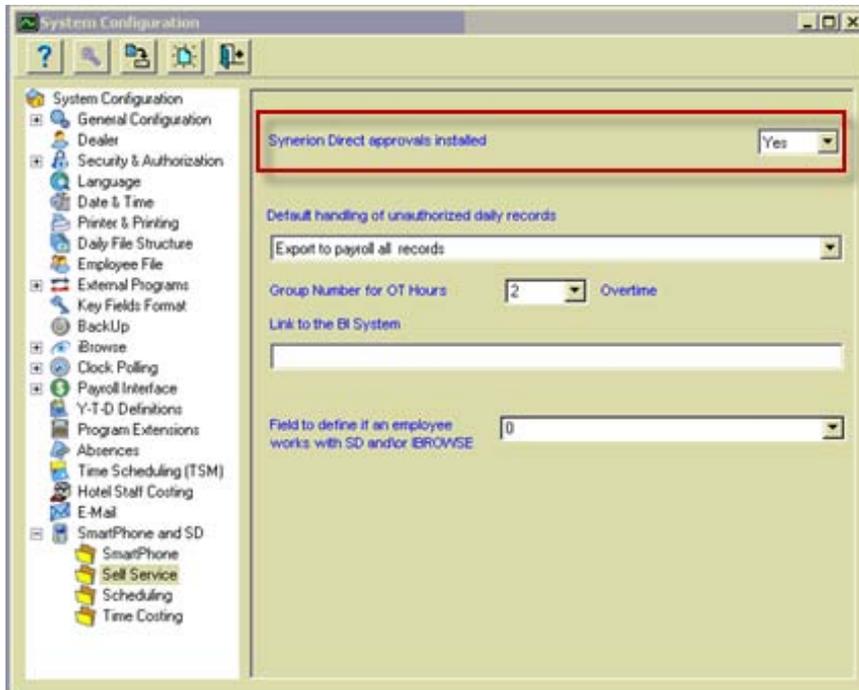
The **Salary Wizard** will support approvals and will prompt the user to treat unapproved employees' records prior to payroll export.

This program has some limitations:

- There is no support for **Export to Payroll** automation.
- The employees' data is exported to payroll at pay period level.
- It is not necessary that all daily records or all employees are exported. You can select some employees and/or some records to be exported.

2 Pre-Requisites

1. Synerion Direct must be enabled. To do so, in **System Configuration**, in **Self-Service**, ensure that **Synerion Direct Approvals Installed** is set to **Yes**.



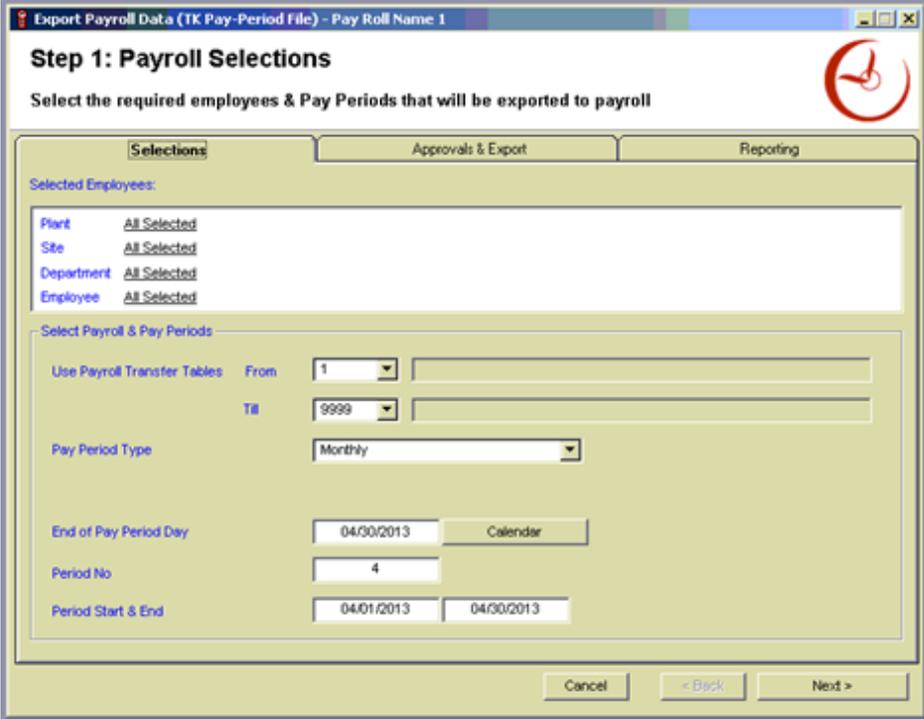
The **Default handling of unauthorized daily records** field sets in the **Approvals and Exports** tab the default action for all employees.

2. In order to include the new **Salary Wizard**, add **DSALWIZ** to the menu (params = **0**).

3 Exporting to Payroll

To use the Salary Wizard, do as follows:

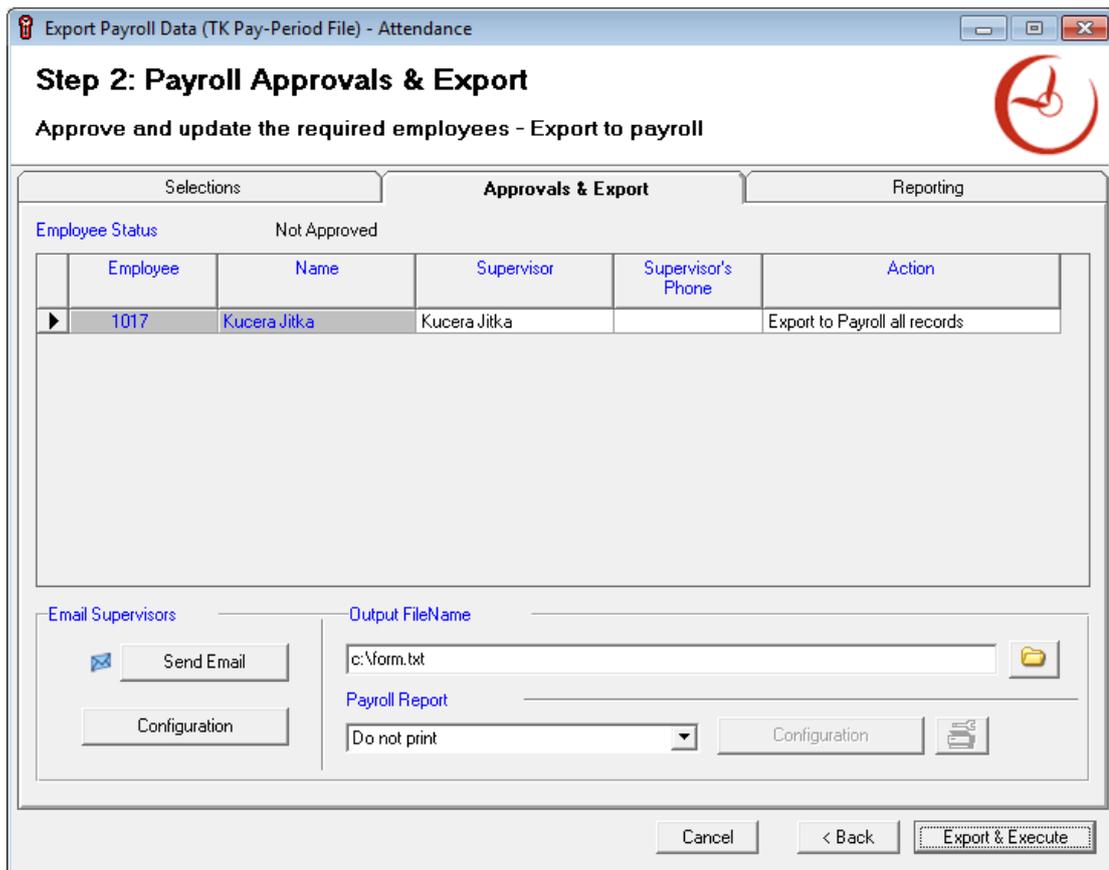
1. From the menu, open the **Salary Wizard**. The **Step 1: Payroll Selections** screen is displayed.



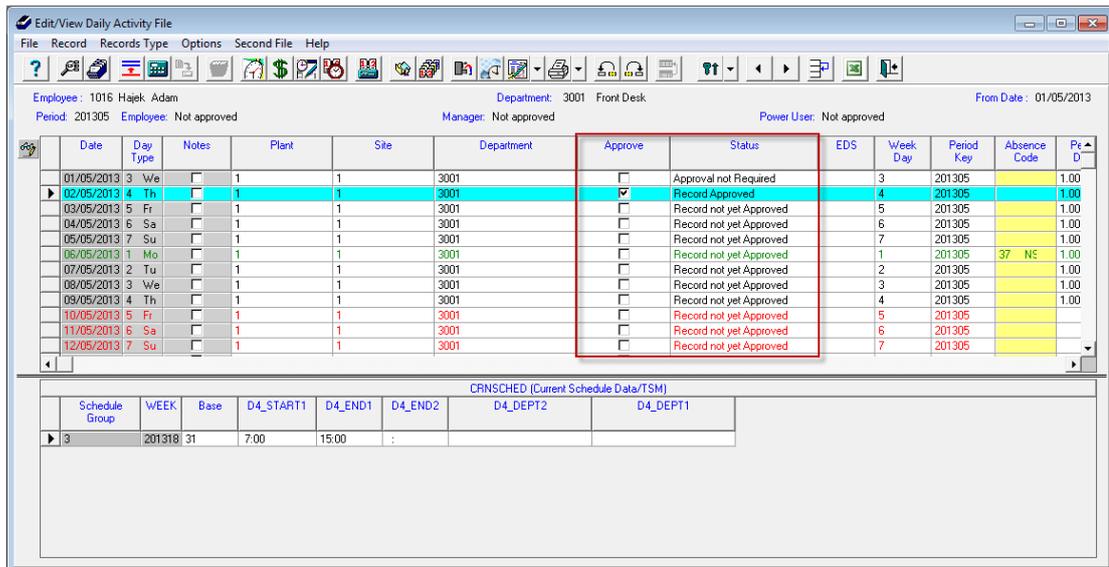
2. Perform the necessary hierarchy, pay periods, and payroll selections.
3. Click **Next**. The **Step 2: Payroll Approvals & Export** screen (**NOTE: Approvals & Export** tab) is displayed.

This table prompts you to treat the unapproved records prior to payroll export. In this table, employee records will be displayed only if the daily records are in either:

- Status **100** (record not yet approved), or
- Status **900** (record not for payroll)



NOTE: The Status column in the Daily Browser will be added if the approvals parameter in SYSCNF is applied (remember to add it to the browser configuration screen). In addition, the Approve column overrides the Supervisor Digital Signature (SDS).



The following are additional actions to be performed in this screen:

- a. Click the value in the **Supervisor** column. The **List of Supervisors** is displayed.

\$ Employee 1016 Hajek Adam

List of Supervisors

	Send Email	Employee	Last Name	First Name	Phone
▶	<input checked="" type="checkbox"/>	1017	Kucera	Jitka	
	<input type="checkbox"/>	1078	Novak	Krista	0545777685
	<input type="checkbox"/>	1122	KRATOCHVIL	Matej	0536622804

Head Supervisor: Kucera Jitka

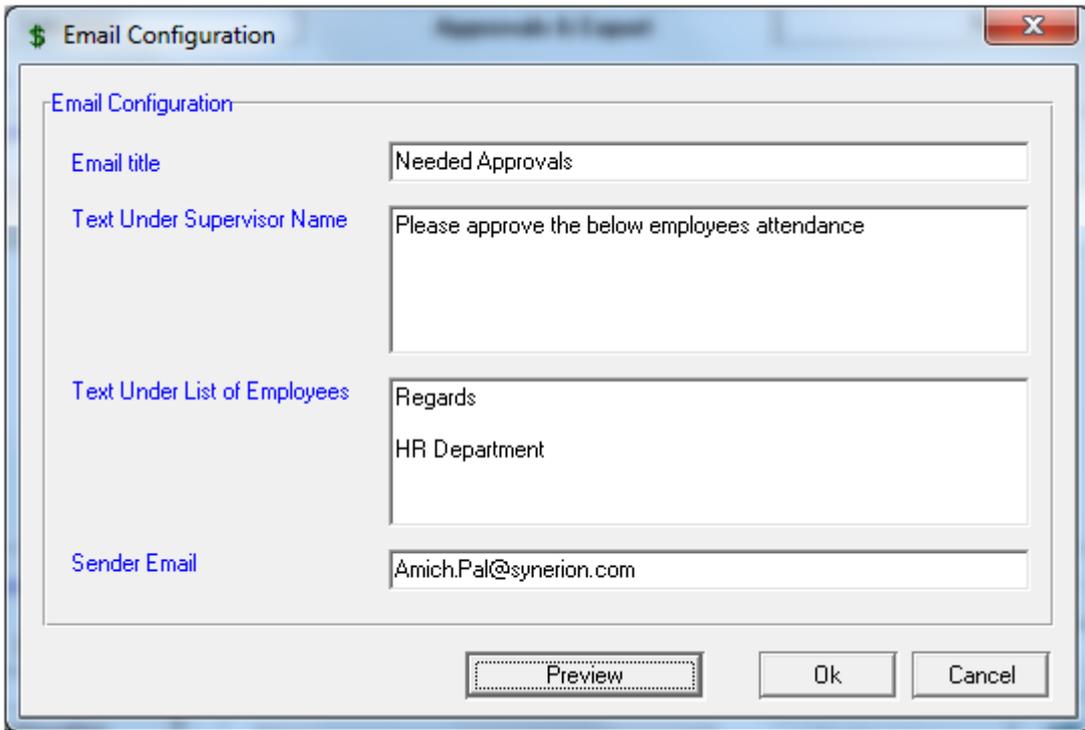
Ok Cancel

- Select the manager/s who will receive notifications about unapproved records.
- In **Head Supervisor**, select the supervisor who will be displayed in the **List of Supervisors**.

Employee Status		Not Approved		
	Employee	Name	Supervisor	Super Phc
▶	1017	Kucera Jitka	Kucera Jitka	

NOTE: This step is most likely to take place by the TKSQL user/HR Manager/Payroll administrator a few days before the pay period ends.

- To define the email parameters, click **Configuration**. The **Email Configuration** screen is displayed.
- Enter the values relevant to your organization.



Email Configuration

Email title: Needed Approvals

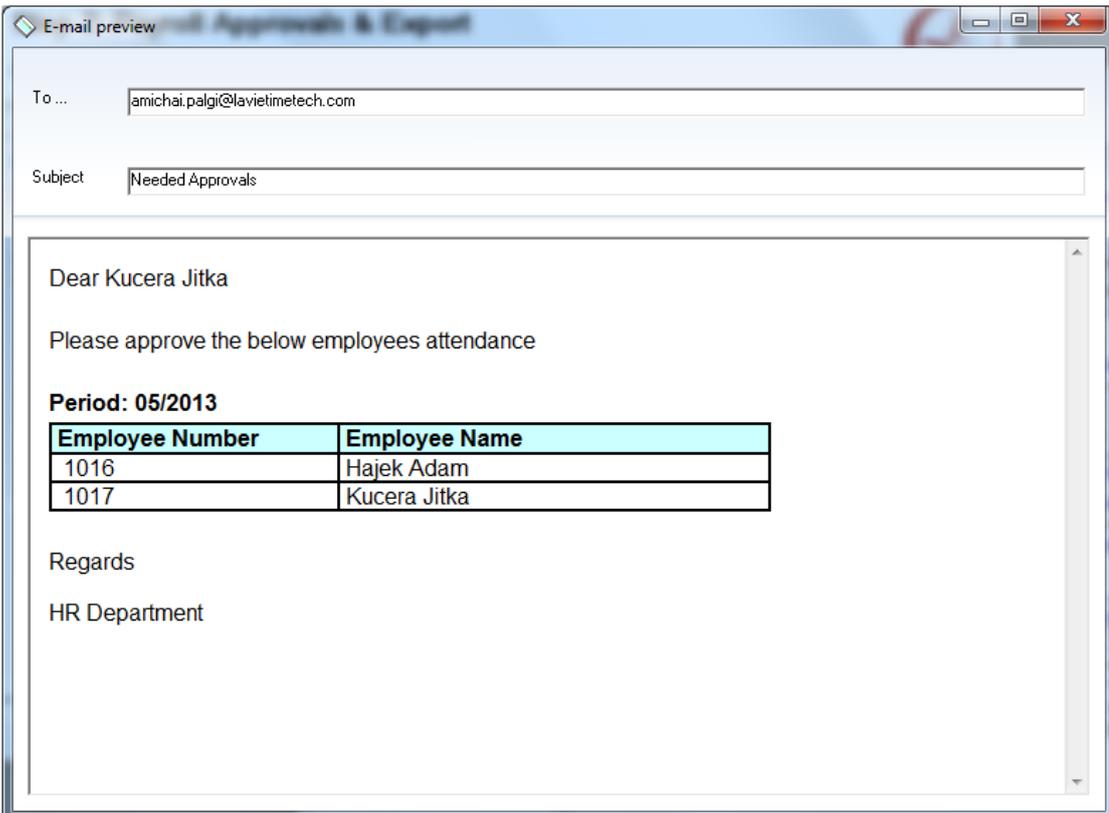
Text Under Supervisor Name: Please approve the below employees attendance

Text Under List of Employees: Regards
HR Department

Sender Email: Amich.Pal@synerion.com

Buttons: Preview, Ok, Cancel

- e. To preview the email, click **Preview**.



E-mail preview

To ...: amichai.palgi@lavietimetech.com

Subject: Needed Approvals

Dear Kucera Jitka

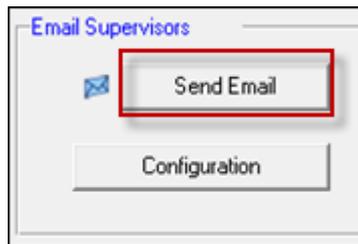
Please approve the below employees attendance

Period: 05/2013

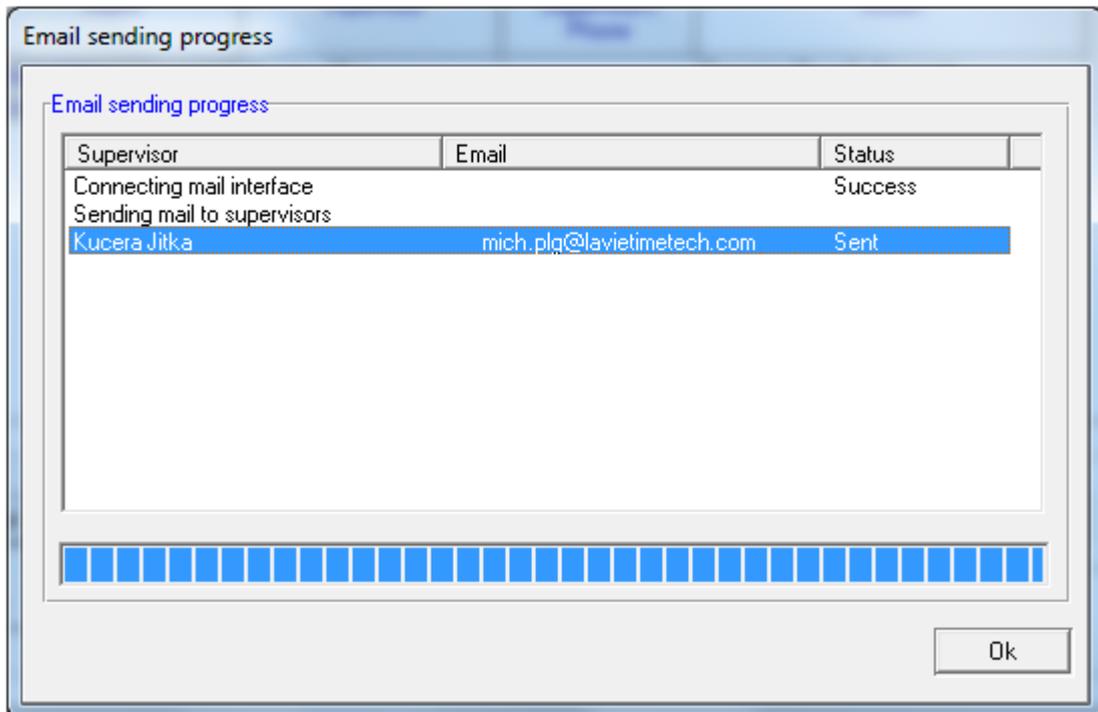
Employee Number	Employee Name
1016	Hajek Adam
1017	Kucera Jitka

Regards
HR Department

- f. Close the preview and then click **OK**.
- g. In order to send a notification email after it was configured, click **Send Email** at this step.



- h. Once you do that, you will see the **Email Sending progress** screen.



4. At the end of the pay period, you return to **Step 2: Payroll Approvals & Export**. For each employee, decide which action to take place in order to export his data to payroll.

The options are:

- **Export to Payroll All Records** - Ignores the record's status in Daily and transfers all data to payroll.

NOTE: Presumably, managers have most likely not yet updated all employees' records and the policy is to export all data.

- **Approve all Records** - In the Daily Browser, changes the status of the records to **Record Approved**.

Edit/View Daily Activity File

File Record Records Type Options Second File Help

Employee: 1016 Hajek, Adam Department: 3001 Front Desk From Date: 01/05/2013
 Period: 201305 Employee: Not approved Manager: Not approved Power User: Not approved

Date	Day Type	Notes	Plant	Site	Department	Approve	Status	EDS	Week Day	Period Key	Absence Code	Px D
01/05/2013	3 We		1	1	3001	<input type="checkbox"/>	Approval not Required		3	201305		1.00
02/05/2013	4 Th		1	1	3001	<input checked="" type="checkbox"/>	Record Approved		4	201305		1.00
03/05/2013	5 Fr		1	1	3001	<input checked="" type="checkbox"/>	Record Approved		5	201305		1.00
04/05/2013	6 Sa		1	1	3001	<input checked="" type="checkbox"/>	Record Approved		6	201305		1.00
05/05/2013	7 Su		1	1	3001	<input checked="" type="checkbox"/>	Record Approved		7	201305		1.00
06/05/2013	1 Mo		1	1	3001	<input checked="" type="checkbox"/>	Record Approved		1	201305	37 NS	1.00
07/05/2013	2 Tu		1	1	3001	<input checked="" type="checkbox"/>	Record Approved		2	201305		1.00
08/05/2013	3 We		1	1	3001	<input checked="" type="checkbox"/>	Record Approved		3	201305		1.00
09/05/2013	4 Th		1	1	3001	<input checked="" type="checkbox"/>	Record Approved		4	201305		1.00
10/05/2013	5 Fr		1	1	3001	<input checked="" type="checkbox"/>	Record Approved		5	201305	1 Un	1.00
11/05/2013	6 Sa		1	1	3001	<input checked="" type="checkbox"/>	Record Approved		6	201305	1 Un	1.00
12/05/2013	7 Su		1	1	3001	<input checked="" type="checkbox"/>	Record Approved		7	201305	1 Un	1.00

CRNSCHED (Current Schedule Data/TSM)

Schedule Group	WEEK	Base	D4_START1	D4_END1	D4_END2	D4_DEPT2	D4_DEPT1
3	201310	31	7:00	15:00	:		

- **Decline Unapproved Records** - Only transfers approved records of all employees in range
- **Do Not Export Employee to Payroll** - Selected when the user does not know how to handle the employee, therefore leaving the employee out of payroll. The employee can still be handled.

Export Payroll Data (TK Pay-Period File) - Attendance

Step 2: Payroll Approvals & Export

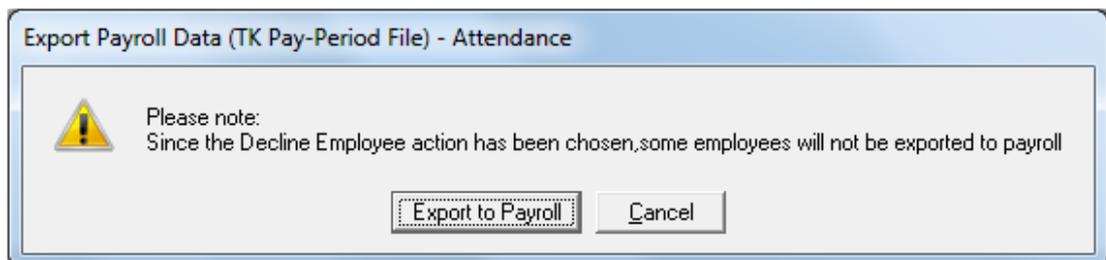
Approve and update the required employees - Export to payroll

Selections Approvals & Export Reporting

Employee Status Not Approved Not for Payroll

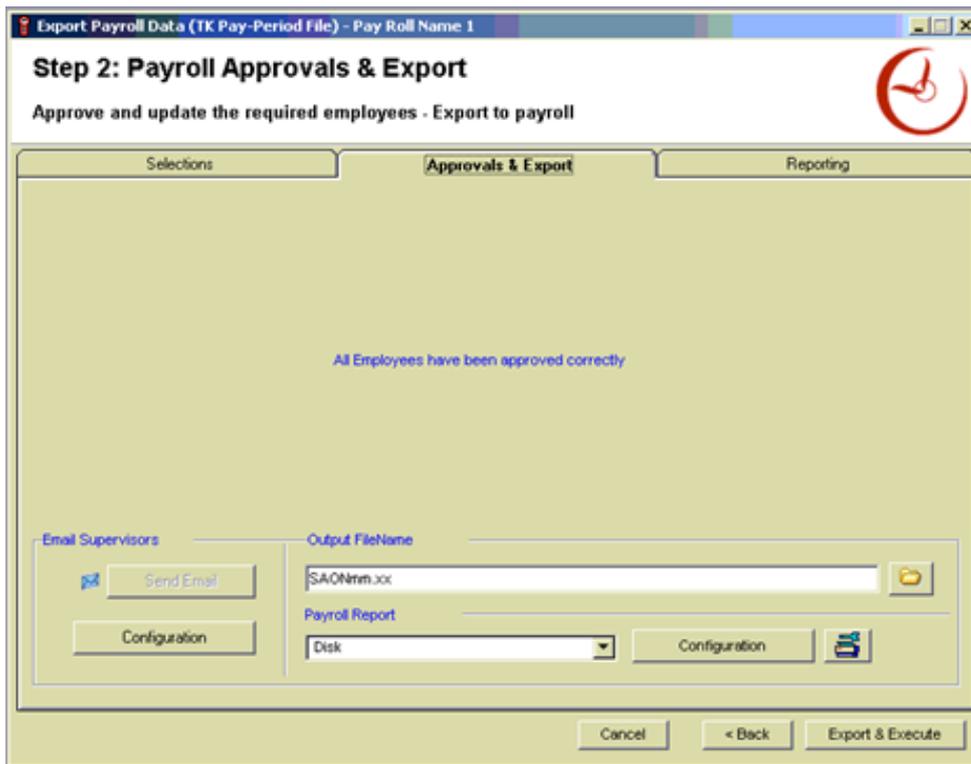
Employee	Name	Supervisor	Supervisor's Phone	Action
1016	Hajek, Adam	Kucera Jitka		Do not Export Employee to Payroll

- If an employee is selected not to be exported to payroll, the **Not for Payroll** field at the top is added. Once export is executed, this message will appear:

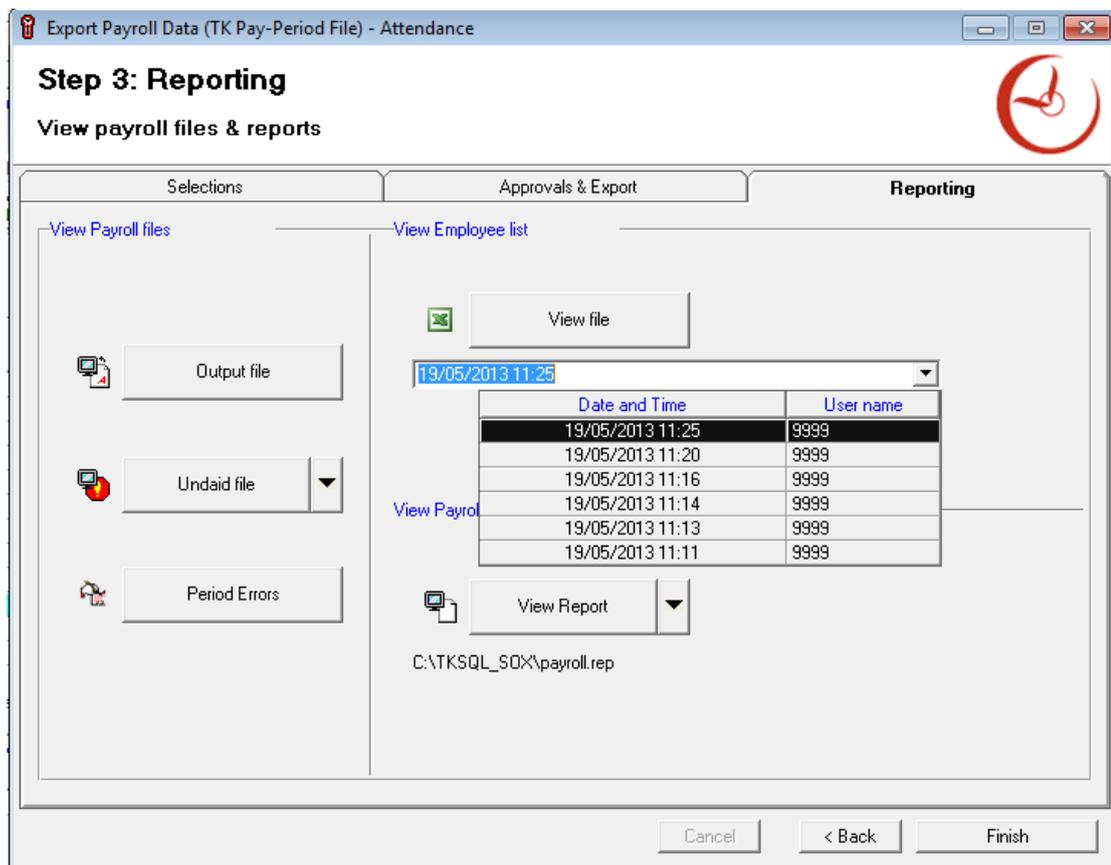


If so, click **Export to Payroll** to continue with the process.

After all employees have been approved, the screen will appear as so:



- Optional: Click **Reporting** to report and monitor errors. The **Step 3: Reporting** screen (NOTE: **Reporting** tab) is displayed.



6. This screen enables the following:

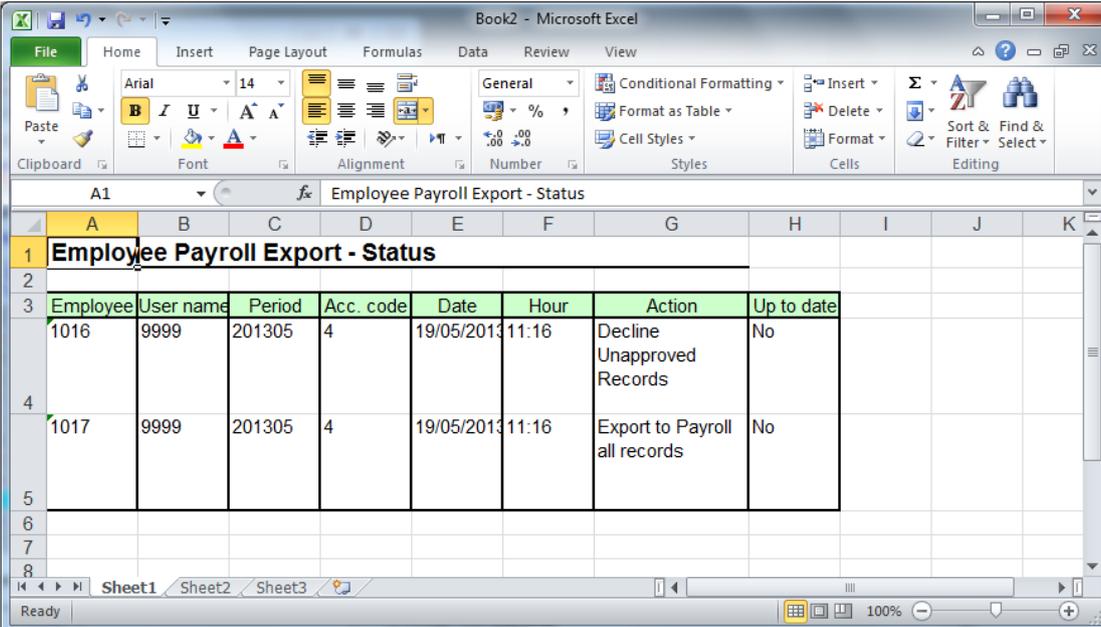
- In **Output File**, view the actual payroll file that was created
- In **Unpaid File**, view the unpaid records (not transferred to payroll)
- In **Period Errors**, view a text file of all errors/exceptions:

Plant	Site	Department	Employee	Employee's Name	Exceptions/Errors	System
1	1	3001	1016	Hajek Adam	Employee not approved for payroll	TK
3	1	4001	1043	Svoboda Martina	Record not found in selected period	TK
3	1	4001	1051	Vesely Max	Record not found in selected period	TK
1	1	3001	1078	Novak Krista	Record not found in selected period	TK
1	1	3001	1119	Wilkins Dominik	Record not found in selected period	TK
1	1	3001	1122	KRATOCHVIL Matej	Record not found in selected period	TK
1	1	3001	1129	CERNY Vojta	Record not found in selected period	TK
1	1	3001	1131	POKORNY Vladimir	Record not found in selected period	TK
1	1	3001	1133	DWORAK Lenka	Record not found in selected period	TK
1	1	3001	1136	HAREK Igor	Record not found in selected period	TK
1	1	4001	1138	FLAJA Ivana	Record not found in selected period	TK
1	1	4001	1140	MAKOVICKA Patrik	Record not found in selected period	TK
1	1	1	1141	MESTAN Anela	Record not found in selected period	TK
1	1	1	1142	BLAZEK Marketa	Record not found in selected period	TK
1	1	4001	1144	MARKOVIC Zuzana	Record not found in selected period	TK
1	1	6002	1146	ZAHRADNIK Petr	Record not found in selected period	TK
1	1	4001	1599	JANECEK Pavel	Record not found in selected period	TK
1	1	4001	1600	Kost Evzen	Record not found in selected period	TK

Note that in the **Exceptions/Errors** column, an employee not approved for payroll is defined as a separate and unique error.

- Each time **Export and Execute** is performed, the date, time, and user that was exported is written to a log. The **Up to Date** column notifies you if the export is the most recent one that was performed for a specific employee. In **View File**, generate an MS Excel spreadsheet produced from that log.

Employee	User name	Period	Acc. code	Date	Hour	Action	Up to date
1016	9999	201305	4	19/05/2013	11:20	Do not Export Employee to Payroll	Yes
1017	9999	201305	4	19/05/2013	11:20	Export to Payroll all records	Yes



The screenshot shows a Microsoft Excel spreadsheet titled "Book2 - Microsoft Excel". The active sheet is "Sheet1" and the active cell is "A1". The spreadsheet contains a table with the following data:

Employee	User name	Period	Acc. code	Date	Hour	Action	Up to date
1016	9999	201305	4	19/05/2013	11:16	Decline Unapproved Records	No
1017	9999	201305	4	19/05/2013	11:16	Export to Payroll all records	No

- In **View Payroll**, view all exports done for that pay period.

4 Statuses

There are three statuses for records taken from **ABS11_Manual_Line**.

- Status **100** = record not yet approved
- Status **900** = record not for payroll
- Status **200** = record approved