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Contents

- 1 Overview 4
- 2 Pre-Requisites 5
- 3 Exporting to Payroll 6
- 4 Statuses 15



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**.

System Configuration		_ 🗆 ×
? 3 3 0 1		
System Configuration General Configuration Dealer General Configuration Dealer Generaty & Authorization Language Date & Time	Synerion Direct approvals installed	Yes 💌
Printer & Printing Daly File Structure Employee File External Programs Key Fields Format	Default handling of unauthorized daily records Export to payroll all records Group Number for OT Hours 2 Overtime	*
BackUp A Browse Cock Poling D Payrol Interface D Payrol Interface	Link to the BK System	
Program Extensions Absences Time Scheduling (TSM) Held Staff Costing E-Mai SmartPhone and SD SmartPhone Seat Service Scheduling	Field to define it an employee works with SD and/or IBROWSE	Ĭ
🏐 Time Costing		

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.

Export Payroll Data (TK Pay-Period File) - Pay Roll Name 1	X								
Step 1: Payroll Selections Image: Comparison of the second se										
Selections	Approvals & Export	Reporting								
Selected Employees:										
Plant All Selected Site All Selected Department All Selected Employee All Selected										
Select Payroll & Pay Periods										
Use Payroll Transfer Tables From	1									
Till Pay Period Type	19999 V Monthly V									
End of Pay Period Day	04/30/2013 Calendar									
Period No	4									
Period Start & End	04/01/2013 04/30/2013									
	Cancel	 Next >								

- 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)



Export Payroll Data (TK Pay-Period File) - Attendance											
Selections Approvals & Export Reporting											
Employee Status	Not Approved										
Employee	Name	Supervisor	Supervisor's Phone	Action							
• 1017	Kucera Jitka	Kucera Jitka		Export to Payroll all records							
Email Supervisors		liename		[
Configurati	ion Je. Montel Do not p	print	<u> </u>	Configuration							
			Cancel	< Back Export & Execute							

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).

۵ 🗳	💋 Edit/View Daily Activity File														
File	File Record Records Type Options Second File Help														
?	? ## ==== # 71\$ \$718 # @# Draw -# == n														
E	Employee: 1016 Hajek Adam Department: 3001 Front Desk From Date: 01/05/2013														
F	Period: 201305 Employee: Not approved Manager: Not approved Power User: Not approved														
69		Date I	Day jype	Notes	Plant	S	ite	Department	Approve	Status	EDS	Week Day	Period Key	Absence Code	Pe ▲ D
		01/05/2013 3	We		1	1	30	01		Approval not Required		3	201305		1.00
	▶	02/05/2013 4	Th		1	1	30	01		Record Approved		4	201305		1.00
		03/05/2013 5	Fr		1	1	30	01		Record not yet Approved		5	201305		1.00
		04/05/2013 6	Sa		1	1	30	01		Record not yet Approved		6	201305		1.00
		05/05/2013 7	Su		1	1	30	01		Record not yet Approved		7	201305		1.00
		06/05/2013 1	Mo	Г	1	1	30	01		Record not yet Approved		1	201305	37 NS	1.00
		07/05/2013 2	Tu		1	1	30	01		Record not yet Approved		2	201305		1.00
		08/05/2013 3	We		1	1	30	01		Record not yet Approved		3	201305		1.00
		09/05/2013 4	Th		1	1	30	01		Record not yet Approved		4	201305		1.00
		10/05/2013 5	Fr		1	1	30	01		Record not yet Approved	_	5	201305		
		11/05/2013 6	Sa		1	1	30	01		Record not yet Approved	_	6	201305		
		12/05/2013 7	Su		1	1	30	01		Record not yet Approved		7	201305		-
	4														•
								CRNSCHED (Current S	chedule Data/TSN	1)					
		Schedule Group	WEEK	Base	D4_START1	D4_END1	D4_END2	D4_DEPT2	D4_0	DEPT1					
	▶	3	20131	8 31	7:00	15:00	1								

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.





\$ E	mple	oyee 10	16 Hajek Adam	I			X
_ ^{Lis}	st of S	Superviso	ors				
		Send Email	Employee	Last Name	First Name	Phone	
	ÞĒ	T	1017	Kucera	Jitka		
			1078	Novak	Krista	0545777685	
			1122	KRATOCHVIL	Matej	0536622804	
	Hea	ad Super	visor	Kucera Jitka		•	
						Ok Ca	ancel

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

Emp	loyee Status	Not Approved			
	Employee	Name	_	Supervisor	Super Pho
▶	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.

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



Salary Wizard TKSQL

\$ Email Configuration	
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
	Preview Ok Cancel

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

S E-mail preview	vals & Export	
To amichai.palgi@lavietime	ech.com	
Subject Needed Approvals		
Dear Kucera Jitka		*
Please approve the below	v employees attendance	
Period: 05/2013		
Employee Number	Employee Name	
1016	Hajek Adam	
1017	Kucera Jitka	
Regards		
HR Department		
1		

- 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.



Email Supervisors									
	Send Email	1							
	Configuration								

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

ail sending progress	Test	
Email sending progress Supervisor	Email	Status
Connecting mail interface Sending mail to supervisors		Success
Kucera Jitka	mich.plg@lavietimetech.com	Sent

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.



Salary Wizard TKSQL

r														
🥔 Ed	🖉 Edit/View Daily Activity File												• •	
File	File Record Records Type Options Second File Help													
?	<u>? 셰겔 코르함 및 귀\$12718 월 @@ Bard-d-ar ar i t</u> > 카 로 D													
Em	Employee: 1016 Hajek Adam Department: 3001 Front Desk From Date: 01/05/2013													
Pe	Period: 201305 Employee: Not approved Manager: Not approved Power User: Not approved													
60%	Date	Day Type	Notes	Plant	S	ite	Department	Approve	Status	EDS	Week Day	Period Key	Absence Code	Pe ▲ D
	01/05/201	3 3 We		1	1	3	1001		Approval not Required		3	201305		1.00
)2/05/201	34 Th		1	1	3	1001		Record Approved		4	201305		1.00
	03/05/201	3 5 Fr		1	1	3	001	v	Record Approved		5	201305		1.00
	04/05/201	36 Sa		1	1	3	001	V	Record Approved		6	201305		1.00
	05/05/201	3 7 Su		1	1	3	1001	<u> </u>	Record Approved		7	201305		1.00
	06/05/201	31 Mo		1	1	3	001		Record Approved		1	201305	37 NS	1.00
	07/05/201	3 2 Tu		1	1	3	001	M	Record Approved		2	201305		1.00
-	08/05/201	33 We		1	1	3	001	M	Record Approved		3	201305		1.00
-	09/05/201	34 Ih		1	1	3	001	N I	Record Approved		4	201305		1.00
-	10/05/201	5 Fr		1	-	3	001	▼	Hecord Approved		5	201305	I Un	1.00
-	12/05/201	3 6 5a		1	1	3	001		Record Approved	-	5	201305	1 Un	1.00
-	12/05/201	s 7 Su		<u></u>	1	3	001	<u> </u>	Hecord Approved		1	201305	I UN	1.00 -
														<u> </u>
							CRNSCHED (Current S	chedule Data/TSM)					
	Schedu Group	e WE	EK Base	D4_START1	D4_END1	D4_END2	D4_DEPT2	D4_D	EPT1					
	► 3	201:	318 31	7:00	15:00	:								
L														
_														

- Decline Unapproved Records Only transfers approved records of all employes 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 (1	Export Payroll Data (TK Pay-Period File) - Attendance											
Step 2: Payroll Approvals & Export												
Approve and upo	Approve and update the required employees - Export to payroll											
Selecti	ons	Approvals & Ex	port	Reporting								
Employee Status	C 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:

Export Payroll Data (TK Pay-Period File) - Attendance								
<u> </u>	Please note: Since the Decline Employee action has been chosen,some employees will not be exported to payroll							
	Export to Payrol Cancel							

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

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





Export Payroll Data (TK Pay-Period File) - Pay Roll Name 1 Step 2: Payroll Approvals & Export Approve and update the required employees - Export to payroll										
Selections	Approvals & Export	Reporting								
	All Employees have been approved correctly									
Email Supervisors	Output FileName									
pendizman	Payrol Report									
Configuration	Disk _	Configuration								
	Cancel	Sack Export & Execute								

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

Export Payroll Data (TK Pay-Peri Step 3: Reporting View payroll files & repor	od File) - Attendance			
Selections		Approvals & Export	Repo	ting
-View Payroll files	View Employe	e list		
	×	View file		
🖳 Output file	19/05/201	13 11:25	•	
		Date and Time	User name	
		19/05/2013 11:25	9999	
		19/05/2013 11:20	9999	
💙 Undaid file		19/05/2013 11:16	9999	
	View Payrol	19/05/2013 11:13	9999	
		19/05/2013 11:11	9999	
Period Errors		View Report		
	C:\TKSQL	_SOX\payroll.rep		
	I			
		6		
		Lanc		Finish



- 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:

- C:\T	KSQL_SOX\	UNPAID.TXT	Canal State	and the second	_			- 0 X
<u>F</u> ile S	earch <u>R</u> e	port						
?	Ľ		н ≽ 🗞	5 🗗 🦻	र 💿 📭			
Plant	Site	Department	Employee	Employee's Name		Exceptions\Errors	System	<u> </u>
	1 1	L 3001	1016	Hajek	Adam	Employee not approved for payroll	TK	
	3 1	L 4001	1043	Svoboda	Martina	Record not found in selected period	TK	
	3 1	L 4001	1051	Vesely	Max	Record not found in selected period	TK	
	1 1	1 3001	1078	Novak	Krista	Record not found in selected period	TK	
	1 1	L 3001	1119	Wilkins	Dominik	Record not found in selected period	TK	
	1 1	L 3001	1122	KRAIUCHVIL	Matej	Record not found in selected period	1 K	
	1 1	L 3001	1129	DOVODNY	Vojta	Record not found in selected period	TK	
	1 1	L 3001	1131	PUCDAY	Viadimir	Record not found in selected period	TK	
	1 1	L 3001	1133	DVORAK NADEV	Lenka	Record not found in selected period	TK	
	1 1	L 3001	1130	FIAREK FIATA	Igor	Record not found in selected period	TK	
	1 1	L 4001	1138	FIALA WAROUTCRA	Ivana	Record not found in selected period	IK	
	1 1	L 4001	1140	MECTIN	Patrik	Record not found in selected period	TU	
	1 1	L 1	1141	DIATEN	Mashata	Record not found in selected period	TU	
	1 1	4001	1142	BLAZEK	Zurreta	Record not found in selected period	TU	
	1 1	L 4001	1144	71UDIDNIU	Dotr	Record not found in selected period	TV	
	1 1	L 6002	1140	TANECEV	Parrol	Record not found in selected period	TV	
	1 1	4001	1577	Voot	Furen	Record not found in selected period	TV	
I		4001	1000	NOSI	EVZEN	Record not round in selected beriod	IK	<u> </u>
								Page 1 of 1 //

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.

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Clip	board 🖬	Font	6	Alignment	5 N	lumber 🗔	Styles	Cells	Editi	ng	
	J3	- (f _x								~
	Α	В	С	D	Е	F	G	Н	I.	J	
1	Employ	ee Payr	oll Expo	ort - Stati	us						
2											
3	Employee	User name	Period	Acc. code	Date	Hour	Action	Up to date			_
4	1016	9999	201305	4	19/05/201	311:20	Do not Export Employee to Payroll	Yes			≡
5	1017	9999	201305	4	19/05/201	11:20	Export to Payroll all records	Yes			
6											
7											
8	► ► Shee	t1 Sheet2	Sheet3	/ •							
Rea	dy							I I I 1009	% 🗩	0	÷ .::



Salary Wizard TKSQL

	Book2 - Microsoft Excel												
F	ile Hom	e Insert	Page Layo	ut Formul	as Data	Review	View					۵ 🕜	
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	A1	• (Jx	Employee	Payroll Exp	ort - Status	1						×
	A	В	C	D	E	F	G		-			J	K
1	Employ	ee Payr	oll Expo	ort - Stat	us								
2													
3	Employee	User name	Period	Acc. code	Date	Hour	Action	Up to) date				
	1016	9999	201305	4	19/05/2013	11:16	Decline	No					_
							Records						
4							1000103						
	1017	9999	201305	4	19/05/2013	11:16	Export to Payroll	No					
							all records						
_													
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	Shee	e t1 / Sheet2	2 / Sheet3 /	<u> </u>				6					
Rea	ady									<u> </u>	• 🕀		

• 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