



Texas Skyward User Group Conference

Qmlativ: Payroll Processing Tips & Tricks

James Phillips

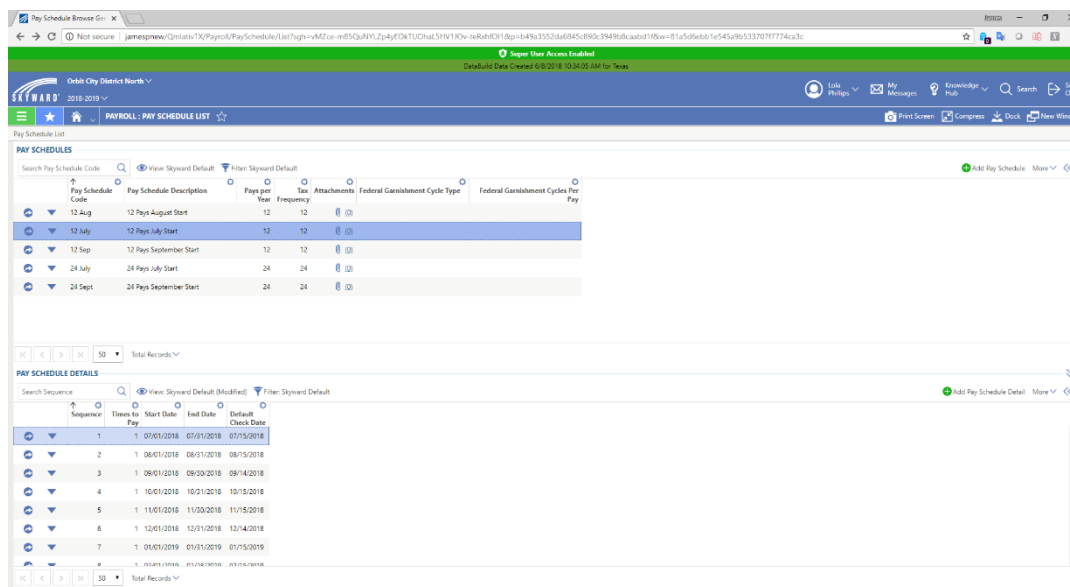


Qmlativ: Payroll Processing Tips & Tricks



This session will discuss features designed to make processing payroll easier. Some features include setting up Check Date defaults on Pay Schedules, using timesheets, reset versus purge, inserting reports to the payroll summary screen, and use of browse views to assist in exception handling.

Setup Check Date defaults on Pay Schedules.



The screenshot displays the Skyward Payroll system interface. The top navigation bar shows the user is logged in as 'Lita Phillips' and the system is for 'Orion City District North'. The main content area is divided into two sections: 'PAY SCHEDULES' and 'PAY SCHEDULE DETAILS'.

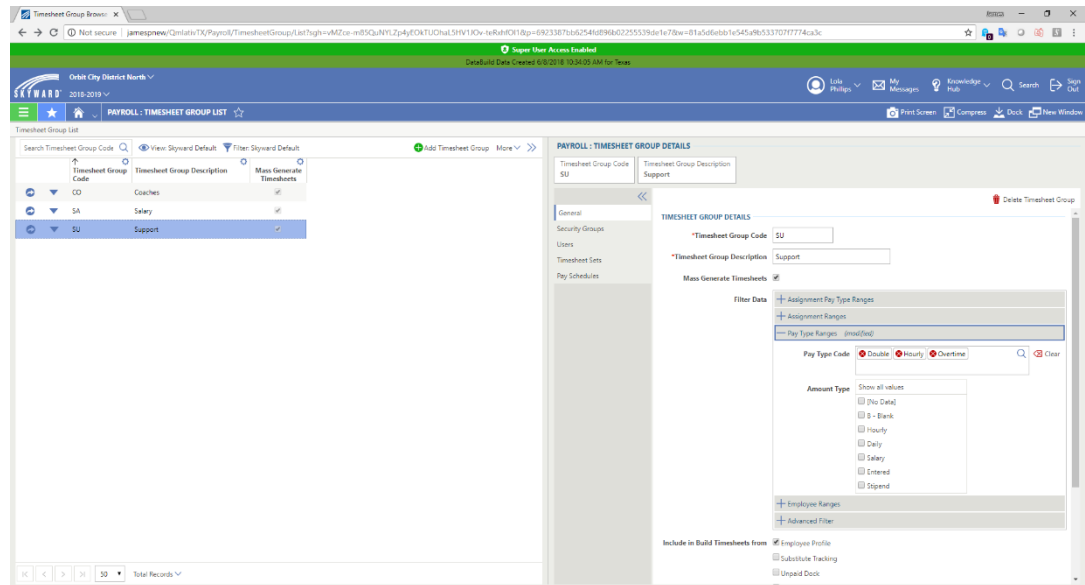
PAY SCHEDULES

Pay Schedule Code	Pay Schedule Description	Pays per Year	Tax Attachments	Federal Garnishment Cycle Type	Federal Garnishment Cycles Per Pay
12 Aug	12 Pays August Start	12	12	(0)	
12 July	12 Pays July Start	12	12	(0)	
12 Sep	12 Pays September Start	12	12	(0)	
24 July	24 Pays July Start	24	24	(0)	
24 Sept	24 Pays September Start	24	24	(0)	

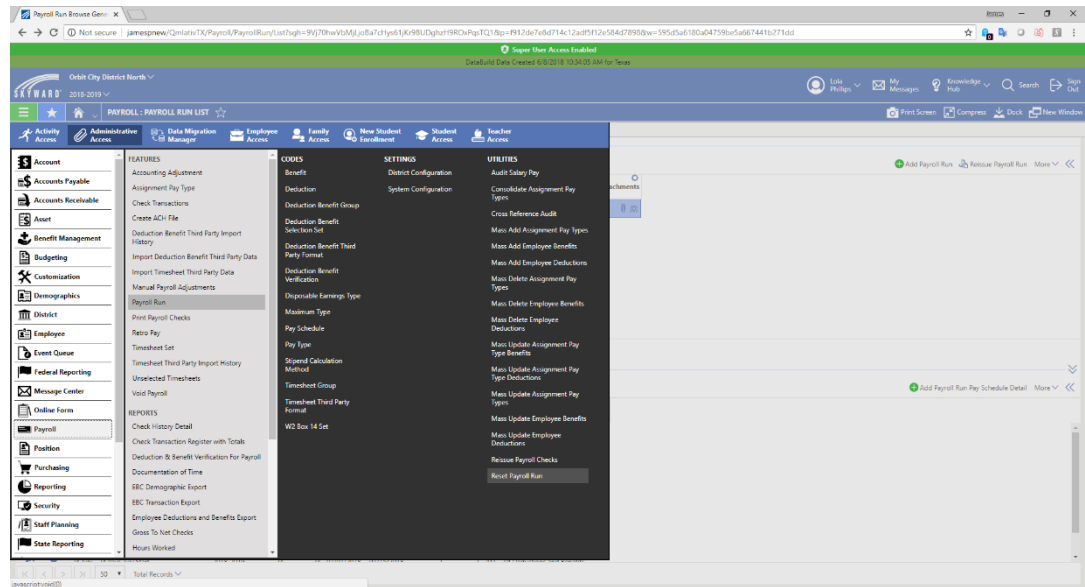
PAY SCHEDULE DETAILS

Sequence	Times to Pay	Start Date	End Date	Default Check Date
1	1	07/01/2018	07/31/2018	07/15/2018
2	1	08/01/2018	08/31/2018	08/15/2018
3	1	09/01/2018	09/30/2018	09/14/2018
4	1	10/01/2018	10/31/2018	10/15/2018
5	1	11/01/2018	11/30/2018	11/15/2018
6	1	12/01/2018	12/31/2018	12/14/2018
7	1	01/01/2019	01/31/2019	01/15/2019

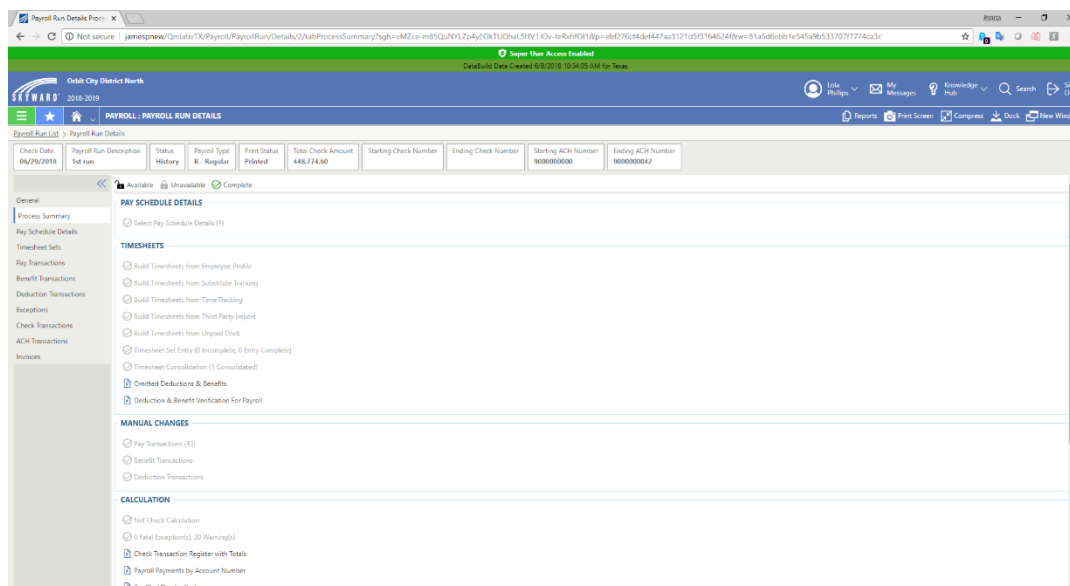
Using Timesheet Groups to group similar employee's pays for easier review during payroll.



Reset Payroll Run versus Purge Payroll



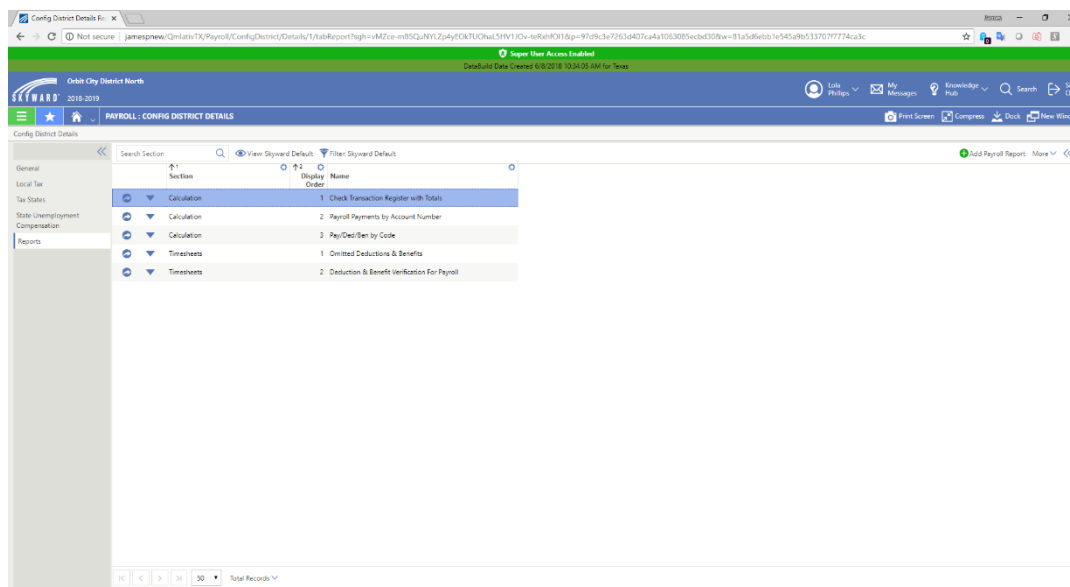
Reports inserted in Payroll Summary screen.



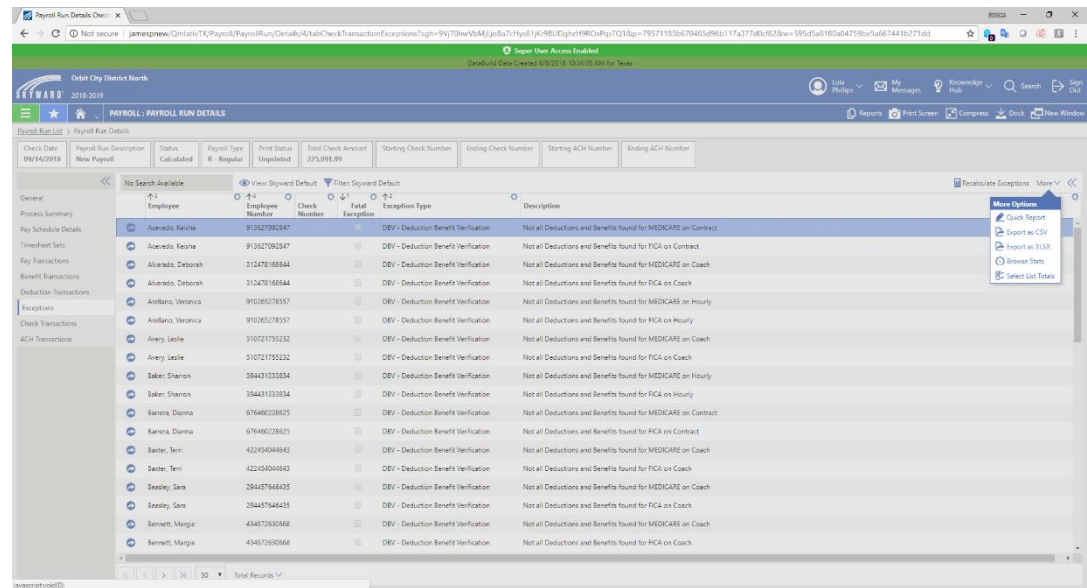
The screenshot displays the 'PAYROLL: PAYROLL RUN DETAILS' screen in a web browser. The interface includes a navigation menu on the left and a main content area with several sections:

- Payroll Run List:** A table with columns for Check Date, Payroll Run Description, Status, Payroll Type, Print Status, Total Check Amount, Starting Check Number, Ending Check Number, Starting ACH Number, and Ending ACH Number. The first row shows a run on 06/29/2018 with a total check amount of 448,774.90.
- General:** A sidebar menu with options like Process Summary, Pay Schedule Details, Timesheet Sets, Pay Transactions, Benefit Transactions, Deduction Transactions, Exceptions, Check Transactions, ACH Transactions, and Invoices.
- PAY SCHEDULE DETAILS:** A section for selecting pay schedule details.
- TIMESHEETS:** A list of options to build timesheets from various sources such as Employee Profile, Substitute Tracking, Time Tracking, Third Party Import, Unpaid Dock, and Incomplete entries.
- MANUAL CHANGES:** Options to manually change pay transactions, benefit transactions, and deduction transactions.
- CALCULATION:** Options to recalculate checks, handle exceptions, check registers, and view payroll payments by account number.

Payroll District Configuration is where to set the inserted reports.



Exceptions browse view



The screenshot displays the 'Exceptions' section within the 'PAYROLL: PAYROLL RUN DETAILS' interface. The main table lists various exceptions for different employees, including details like Employee Number, Check Number, Exception Type, and Description. A 'More Options' menu is visible on the right side of the table.

Employee	Employee Number	Check Number	Fatal	Exception Type	Description
Azevedo, Karine	913827902847			DEV - Deduction Benefits Verification	Not all Deductions and Benefits found for MEDICARE on Contract
Azevedo, Karine	913827902847			DEV - Deduction Benefits Verification	Not all Deductions and Benefits found for FICA on Contract
Alexandro, Deborah	312478168544			DEV - Deduction Benefits Verification	Not all Deductions and Benefits found for FICA on Coach
Alexandro, Deborah	312478168544			DEV - Deduction Benefits Verification	Not all Deductions and Benefits found for MEDICARE on Coach
Ambiano, Veronica	910265278357			DEV - Deduction Benefits Verification	Not all Deductions and Benefits found for MEDICARE on Hourly
Ambiano, Veronica	910265278357			DEV - Deduction Benefits Verification	Not all Deductions and Benefits found for FICA on Hourly
Avery, Leslie	31072175232			DEV - Deduction Benefits Verification	Not all Deductions and Benefits found for FICA on Coach
Avery, Leslie	31072175232			DEV - Deduction Benefits Verification	Not all Deductions and Benefits found for FICA on Coach
Baker, Sharon	384431333834			DEV - Deduction Benefits Verification	Not all Deductions and Benefits found for MEDICARE on Hourly
Baker, Sharon	384431333834			DEV - Deduction Benefits Verification	Not all Deductions and Benefits found for FICA on Hourly
Barera, Dianra	676460228825			DEV - Deduction Benefits Verification	Not all Deductions and Benefits found for MEDICARE on Contract
Barera, Dianra	676460228825			DEV - Deduction Benefits Verification	Not all Deductions and Benefits found for FICA on Contract
Baxter, Terri	422454046643			DEV - Deduction Benefits Verification	Not all Deductions and Benefits found for MEDICARE on Coach
Baxter, Terri	422454046643			DEV - Deduction Benefits Verification	Not all Deductions and Benefits found for FICA on Coach
Beasley, Sara	284457646435			DEV - Deduction Benefits Verification	Not all Deductions and Benefits found for MEDICARE on Coach
Beasley, Sara	284457646435			DEV - Deduction Benefits Verification	Not all Deductions and Benefits found for FICA on Coach
Bennett, Margie	434872630568			DEV - Deduction Benefits Verification	Not all Deductions and Benefits found for MEDICARE on Coach
Bennett, Margie	434872630568			DEV - Deduction Benefits Verification	Not all Deductions and Benefits found for FICA on Coach



Texas Skyward User Group Conference

THANK YOU FOR ATTENDING!

