



Texas Skyward User Group Conference

Qmlativ: Payroll Processing Tips & Tricks

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Qmlativ: Payroll Processing Tips & Tricks

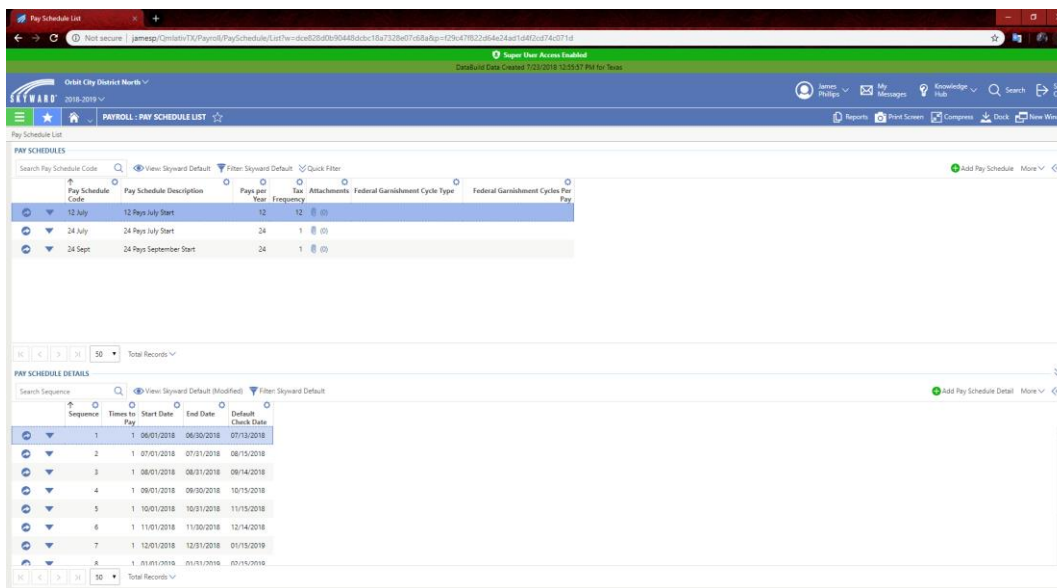


This session will discuss features designed to make processing payroll easier.

Some features to be covered include:

- Setting up Check Date defaults on Pay Schedules
- Using timesheets
- Reset versus purge
- Inserting reports to the payroll summary screen
- Use of browse views to assist in exception handling

Setup Check Date defaults on Pay Schedules.



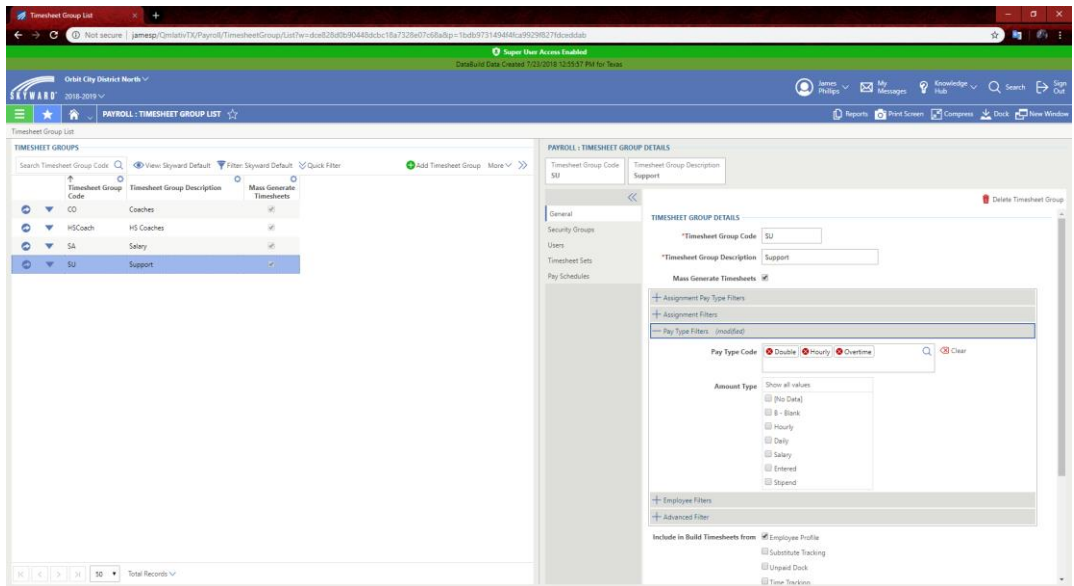
The screenshot displays the Skyward Payroll - Pay Schedule List interface. The main table lists three pay schedules:

Pay Schedule Code	Pay Schedule Description	Pay per Year	Tax Attachments	Federal Garnishment Cycle Type	Federal Garnishment Cycles Per Pay
12 July	12 Pays July Start	12	12 (0)		
24 July	24 Pays July Start	24	1 (0)		
24 Sept	24 Pays September Start	24	1 (0)		

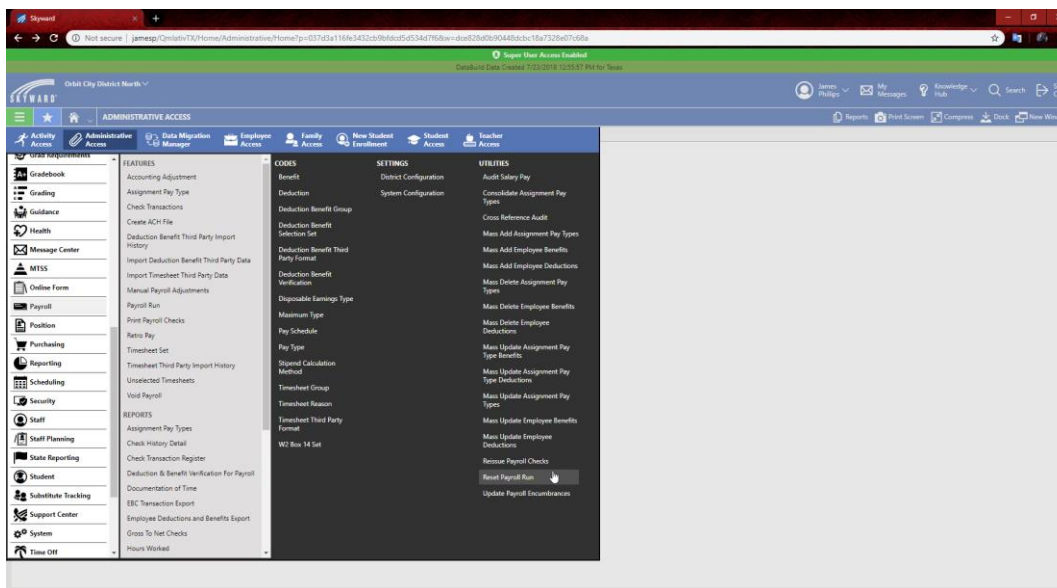
Below the main table, the 'PAY SCHEDULE DETAILS' section shows a table of sequence details for the selected schedule:

Sequence	Times to Pay	Start Date	End Date	Default Check Date
1	1	06/01/2018	06/30/2018	07/13/2018
2	1	07/01/2018	07/31/2018	08/15/2018
3	1	08/01/2018	08/31/2018	09/14/2018
4	1	09/01/2018	09/30/2018	10/15/2018
5	1	10/01/2018	10/31/2018	11/15/2018
6	1	11/01/2018	11/30/2018	12/14/2018
7	1	12/01/2018	12/31/2018	01/15/2019
8	1	01/01/2019	01/31/2019	02/15/2019

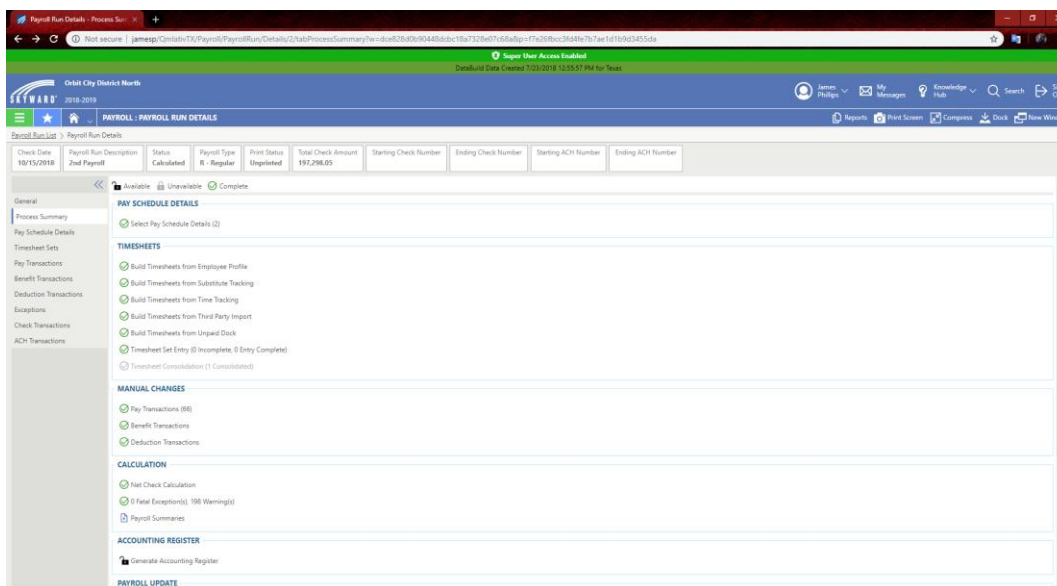
Using Timesheet Groups to group similar employee's pays for easier review during payroll.



Reset Payroll Run versus Purge Payroll



Reports inserted in Payroll Summary screen.

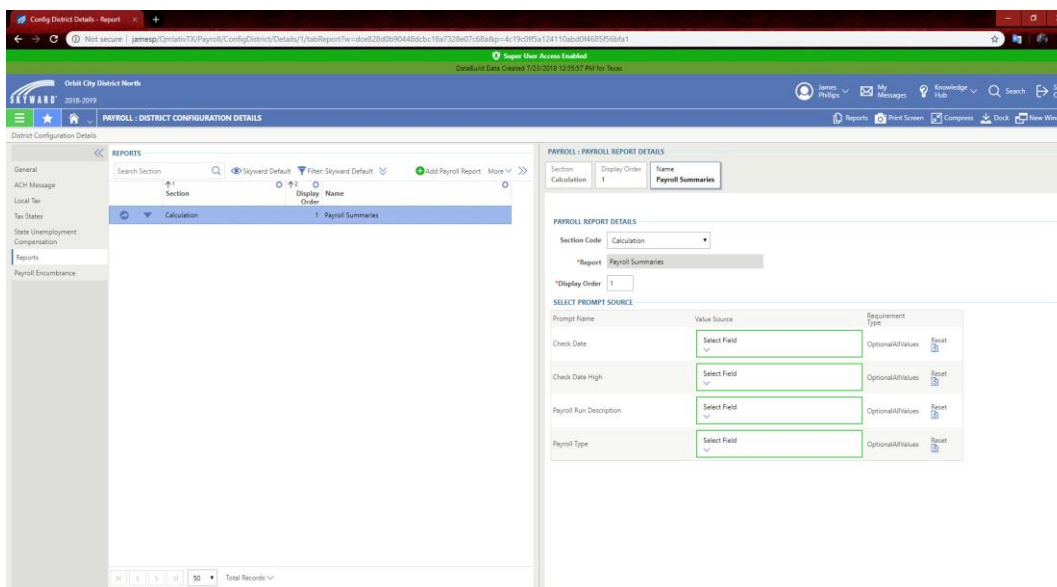


The screenshot displays the 'PAYROLL: PAYROLL RUN DETAILS' screen in the Skyward system. At the top, there is a navigation bar with the Skyward logo and user information. Below this is a table with columns for 'Check Date', 'Payroll Run Description', 'Status', 'Payroll Type', 'Print Status', 'Total Check Amount', 'Starting Check Number', 'Ending Check Number', 'Starting ACH Number', and 'Ending ACH Number'. The first row shows a check date of 10/15/2018 for '2nd Payroll' with a status of 'Calculated' and a total check amount of 197,298.05.

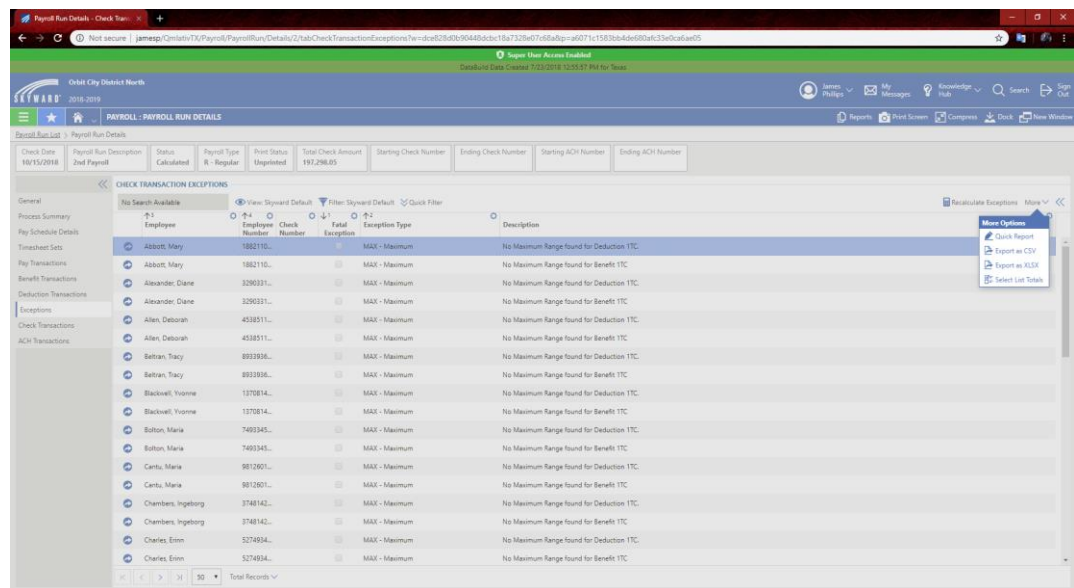
On the left side, there is a sidebar menu with options like 'Process Summary', 'Pay Schedule Details', 'Timesheet Sets', 'Pay Transactions', 'Benefit Transactions', 'Deduction Transactions', 'Exceptions', 'Check Transactions', and 'ACH Transactions'. The main content area is divided into several sections:

- PAY SCHEDULE DETAILS:** Includes 'Select Pay Schedule Details (2)'.
- TIMESHETS:** Lists tasks such as 'Build Timesheets from Employee Profile', 'Build Timesheets from Substitute Tracking', 'Build Timesheets from Time Tracking', 'Build Timesheets from Third Party Import', 'Build Timesheets from Unpaid Dock', and 'Timesheet Set Entry (2) Incomplete, 0 Entry Completed'.
- MANUAL CHANGES:** Lists 'Pay Transactions (0)', 'Benefit Transactions', and 'Deduction Transactions'.
- CALCULATION:** Lists 'Net Check Calculation', '0 Faxed Exceptions (0) Warning(s)', and 'Payroll Summaries'.
- ACCOUNTING REGISTER:** Includes 'Generate Accounting Register'.
- PAYROLL UPDATE:** A section at the bottom of the main content area.

Payroll District Configuration is where to set the inserted reports.



Exceptions browse view



Payroll Run Details - Check Transaction Exceptions

Check Date	Payroll Run Description	Status	Payroll Type	Post Status	Total Check Amount	Starting Check Number	Ending Check Number	Starting ACH Number	Ending ACH Number
10/15/2018	2nd Payroll	Calculated	R - Regular	Unprinted	197,298.05				

CHECK TRANSACTION EXCEPTIONS

Employee	Check Number	Fatal Exception	Exception Type	Description
Albott, Mary	1802150.		MAX - Maximum	No Maximum Range found for Deduction 1TC
Albott, Mary	1802150.		MAX - Maximum	No Maximum Range found for Benefit 1TC
Alexander, Diane	3290331.		MAX - Maximum	No Maximum Range found for Deduction 1TC
Alexander, Diane	3290331.		MAX - Maximum	No Maximum Range found for Benefit 1TC
Allen, Deborah	4538511.		MAX - Maximum	No Maximum Range found for Deduction 1TC
Allen, Deborah	4538511.		MAX - Maximum	No Maximum Range found for Benefit 1TC
Baltran, Tracy	8939306.		MAX - Maximum	No Maximum Range found for Deduction 1TC
Baltran, Tracy	8939306.		MAX - Maximum	No Maximum Range found for Benefit 1TC
Blackwell, Yvonne	1270814.		MAX - Maximum	No Maximum Range found for Deduction 1TC
Blackwell, Yvonne	1270814.		MAX - Maximum	No Maximum Range found for Benefit 1TC
Bolton, Maria	7493345.		MAX - Maximum	No Maximum Range found for Deduction 1TC
Bolton, Maria	7493345.		MAX - Maximum	No Maximum Range found for Benefit 1TC
Cantu, Maria	9812601.		MAX - Maximum	No Maximum Range found for Deduction 1TC
Cantu, Maria	9812601.		MAX - Maximum	No Maximum Range found for Benefit 1TC
Chambers, Ingeborg	3748142.		MAX - Maximum	No Maximum Range found for Deduction 1TC
Chambers, Ingeborg	3748142.		MAX - Maximum	No Maximum Range found for Benefit 1TC
Charles, Eron	5274934.		MAX - Maximum	No Maximum Range found for Deduction 1TC
Charles, Eron	5274934.		MAX - Maximum	No Maximum Range found for Benefit 1TC



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THANK YOU FOR ATTENDING!

