

WELCOME TO  
**CONNECT**

# CONNECT 24

The logo for 'CONNECT 24' features the word 'CONNECT' in a bold, teal, sans-serif font. To its right, the numbers '24' are rendered in the same teal font. The '2' and '4' are partially enclosed by a dashed teal circle. Five small, colored dots (yellow, orange, pink, red, and teal) are positioned around the perimeter of this dashed circle.

E L I M I N A T I N G   K E Y S T R O K E S

**Time Saving Processes in HR**



# Lisa Wuersig

Sr. Implementation  
Consultant

“

“Workaholics aren't heroes. They don't save the day, they just use it up. The real hero is home because they figured out a faster way.” - *Jason Fried*

”

# Working Smarter



- Short Cuts



- Imports



- Calculation Processes

# Short Cuts

- ❖ Quick ways to enter dates
- ❖ What security permission is this?
- ❖ Add a value to a validation set without leaving your entry page
- ❖ Set defaults to see the information you use the most



### Employee Position Report

Load Saved Report  ▼

Distribution Group

Override Report Title

Email Group  ▼

As Of Date

Sort By  ▼

Position Status  ▼

Departments

Employee Status

Available Department(s): 51

- 001 - Council
- 002 - Clerk of Council
- 010 - Information Technology
- 011 - Mayor's Office
- 012 - City Sealer
- 020 - Auditor's Office
- 030 - Treasurer's Office
- 041 - Legal
- 042 - Prosecutor's Office
- 051 - Judicial - #1
- 055 - Judicial - #2

Selected Department(s): 0

- 

Print

Reset

Save

Save As

Delete

# Want Today's Date???



Simply click the letter  
“T”  
on your keyboard!



### Employee Position Report

Load Saved Report

Override Report Title

As Of Date

Sort By  ▼

Position Status  ▼

# Quick Date Range?

The screenshot shows the 'New World ERP' interface for a 'G/L Distribution Report'. The top navigation bar includes 'myFavorites', 'Financial Management', 'Human Resources', 'Utility Management', 'Community Development', and 'Maintenance'. The report title is 'G/L Distribution Report'. Below the title are tabs for 'General', 'Organizations', 'Hour Codes', 'Hour Categories', 'Benefits', 'Taxes', and 'Workers Comp'. The 'General' tab is active. The form contains several fields: 'Load Saved Report' (dropdown), 'Override Report Title' (text), 'Distribution Group' (dropdown with a refresh icon), 'Email Group' (dropdown), 'Check Date From' (calendar icon), 'Check Date To' (calendar icon), 'Pay Group' (dropdown), 'Batch' (dropdown with a refresh icon), and 'Sort By' (dropdown set to 'Position'). At the bottom are buttons for 'Submit', 'Save', 'Save As', 'Delete', and 'Reset'.

New World ERP Search



myFavorites | Financial Management | Human Resources | Utility Ma

### G/L Distribution Report

General Organizations Hour Codes Hour Categories

Load Saved Report

Override Report Title

Check Date From   


Check Date To

Sort By

- This Week
- This Month**
- This Year
- Year To Date
- Last Week
- Last Month
- Last Year

Submit Save Save As

*Clicking the double calendar allows you to choose common date ranges*

 **New World ERP**

myFavorites | Financial Management | Human Resources | Ut



### G/L Distribution Report



**General** | Organizations | Hour Codes | Hour Catego


Load Saved Report

Override Report Title

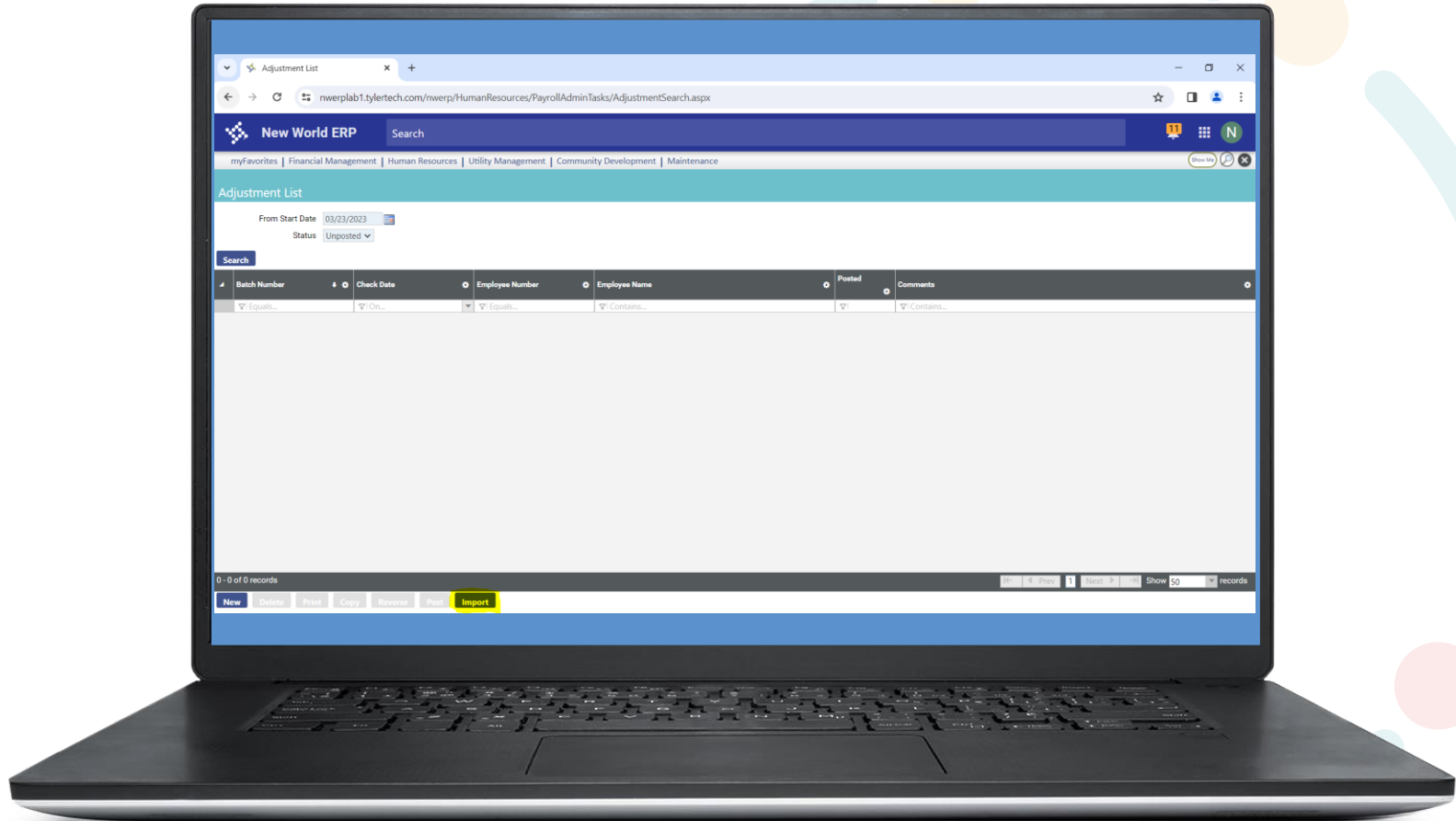
---

Check Date From   

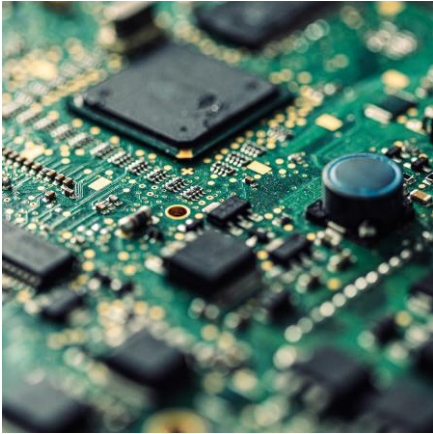
Check Date To   

Sort By  

*Choosing  
“This Month”  
populates the  
first day and  
last day of the  
current month*



# What Permission is This?



**Ctrl**





**Shift**



**Left Click**

## Adjustment List

From Start Date  

Status  

Search

### Security Component Detail


#### Page

Name **Adjustment List**

URL /HumanResources/PayrollAdminTasks/AdjustmentSearch.aspx











#### Security Component

Name **Payroll Adjustment Processing**

Company Based 

ID 975

	<u>Available</u>	<u>Authorized</u>
--	------------------	-------------------

View		
Change		
Add		
Delete		
Print		

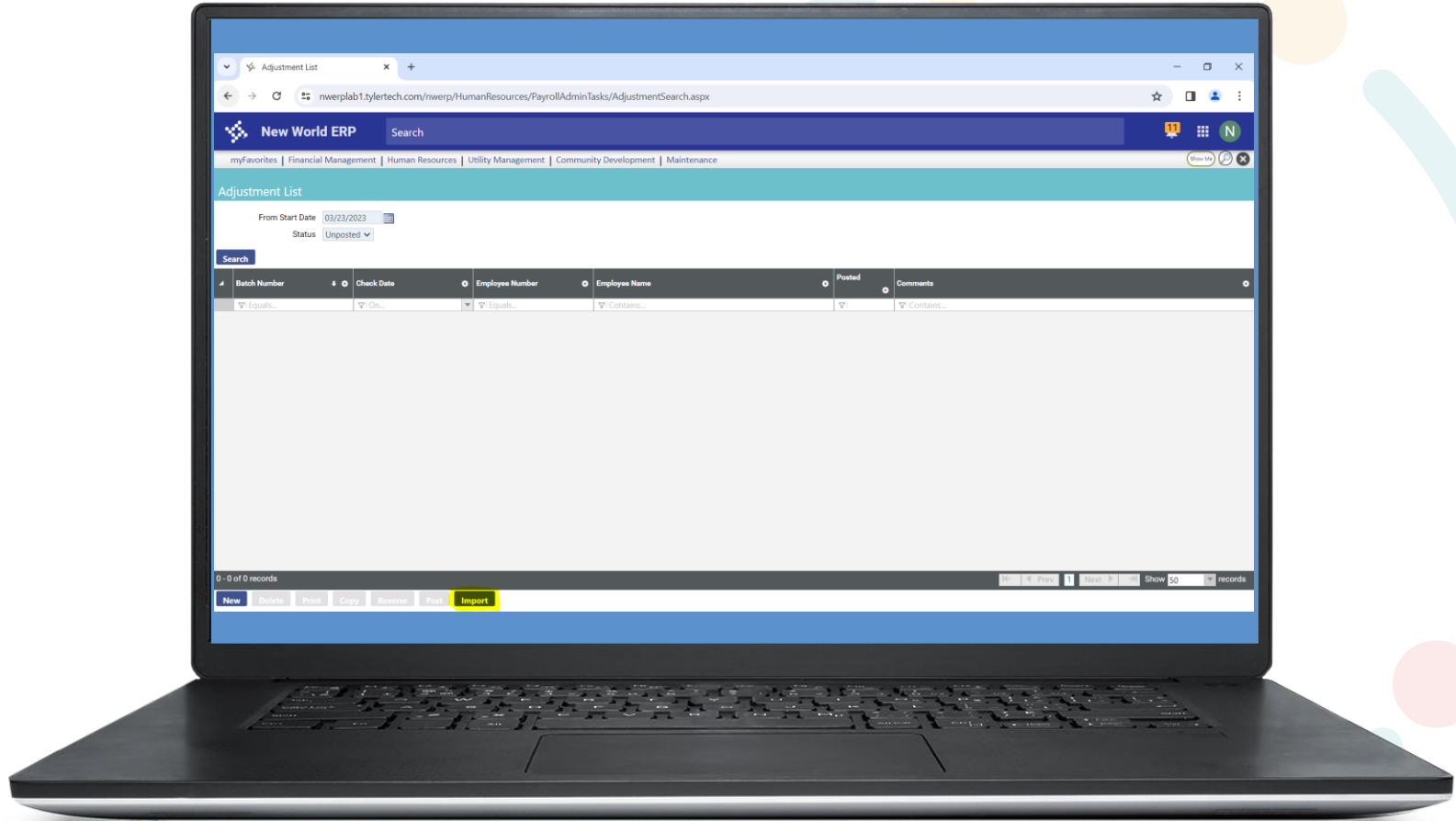
OK

Print Authorized Users

Ctrl + Shift + Left Mouse Click

## On the Item You Need!

The result returned is for Adjustment Processing, not the Adjustment Import.





## Adjustment List

From Start Date    
Status

Search

Batch   
Import

### Security Component Detail

---

**Page**

Name **Import Employee Adjustment**  
URL **/HumanResources/PayrollAdminTasks/AdjustmentImport.aspx**

---

**Security Component**

Name **Payroll Adjustment Import**

Company Based   
ID **3775**

	<b>Available</b>	<b>Authorized</b>
View	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Change	<input type="checkbox"/>	<input type="checkbox"/>
Add	<input type="checkbox"/>	<input type="checkbox"/>
Delete	<input type="checkbox"/>	<input type="checkbox"/>
Print	<input type="checkbox"/>	<input type="checkbox"/>

0 - 0 of 0 records



## Adjustment List

From Start Date    
Status

Search Import Adjustment

Import Employee Adjustment

Import Cancel

### Security Component Detail

**Page**  
Name Import Employee Adjustment  
URL /HumanResources/PayrollAdminTasks/AdjustmentImport.aspx

**Security Component**  
Name Payroll Adjustment Import  
Company Based   
ID 3775

	Available	Authorized
View	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Change	<input type="checkbox"/>	<input type="checkbox"/>
Add	<input type="checkbox"/>	<input type="checkbox"/>
Delete	<input type="checkbox"/>	<input type="checkbox"/>
Print	<input type="checkbox"/>	<input type="checkbox"/>

OK Print Authorized Users

Concerned about who has access?

# Report Lists Users and Templates



Security Component Report - Google Chrome

nwerplab1.tylertech.com/nwerp/LogosSuite/SQLReports/SQLReportViewer.aspx?ReportGUID=fafb5efd-a20e-46de-8431-32e6bf710f7b&ComponentID=3193&ReportTitle=Security+Component+Report

2 of 2 Find | Next

Send to myReports

## Security Component Report

by Security Component

User	Add	Change	Delete	View/Use	Print	Undo Checkout	Finalize
User223				Yes			
User250				Yes			
User334				Yes			
User40				Yes			
User42				Yes			
User79				Yes			
User86				Yes			
User89				Yes			
Total User Count				61			

Template	Add	Change	Delete	View/Use	Print	Undo Checkout	Finalize
HR ALL				Yes			

Run by NWS on 03/23/2024 14:19:04 PM

Page 2 of 2

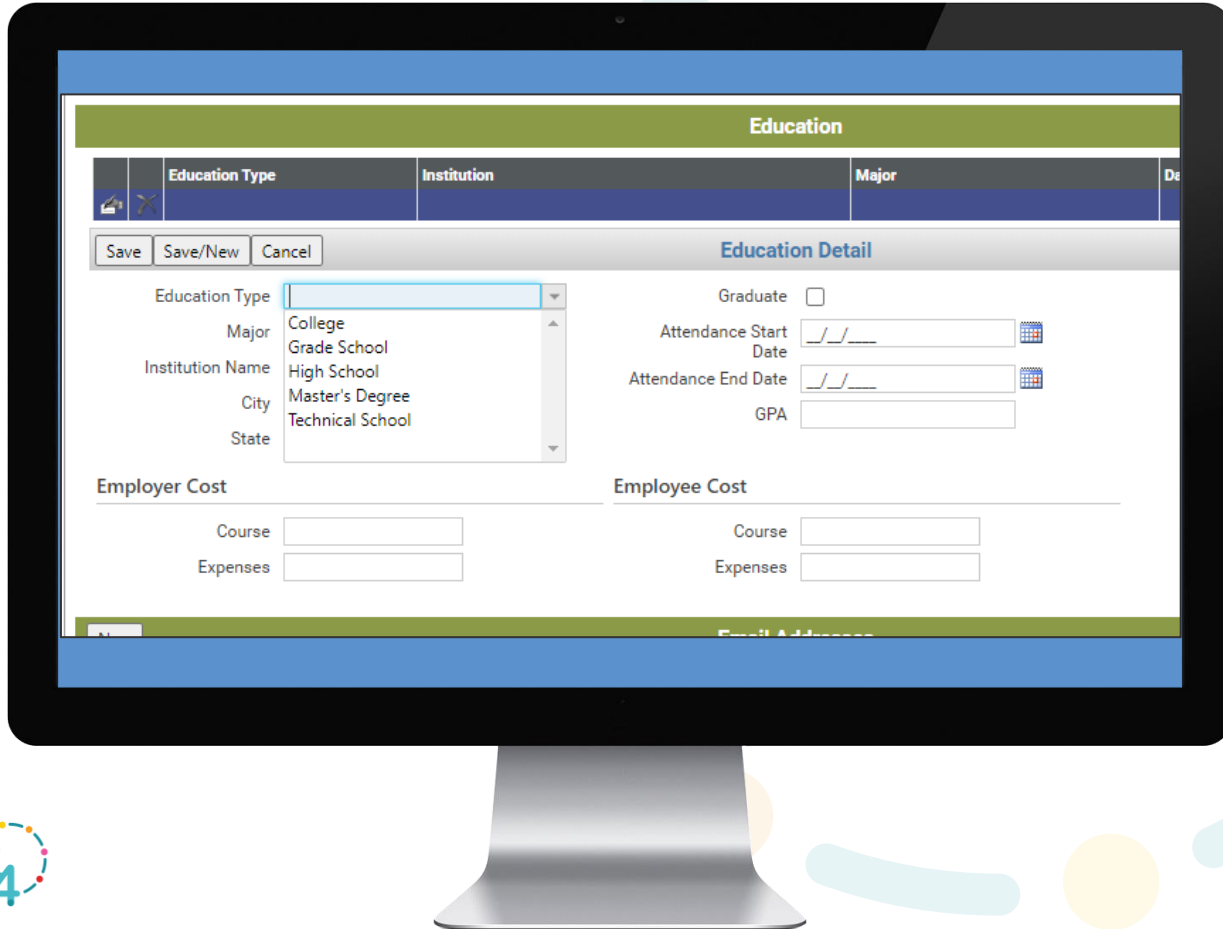
“

“Do the best you can until you know better. Then when you know better, do better.” -*Maya Angelou*

”

# Quick Link to Add a Value to a Validation Set





ent | Maintenance

- new world ERP Suite
- Financial Management
- Human Resources
- Utility Management
- Community Development
- About new world ERP

Education

Major

Education Detail

Graduate

- Security
- System
  - System Settings
  - new world ERP Settings
  - G/L Account Mask Settings
  - Company Suite Settings
  - Form Layout
  - Validation Sets
    - Validation Set List
    - Validation Set Contexts
    - Validation Set Merge
  - Reports
  - Record Locks
  - Master File Cache
  - Error Processing
  - Mail Merge Templates
  - Import/Export
  - Counters
  - Email Templates
  - ePay Management
- Process Manager
- Approval Manager
- Notifications
- Chart of Accounts
- Procurement
- Banks
- Revenue Collection
- Miscellaneous Definitions
- Arc GIS Server Setup
- Address Certification

Timeline Filter Employee

03/27/2024

Attendance Graduate

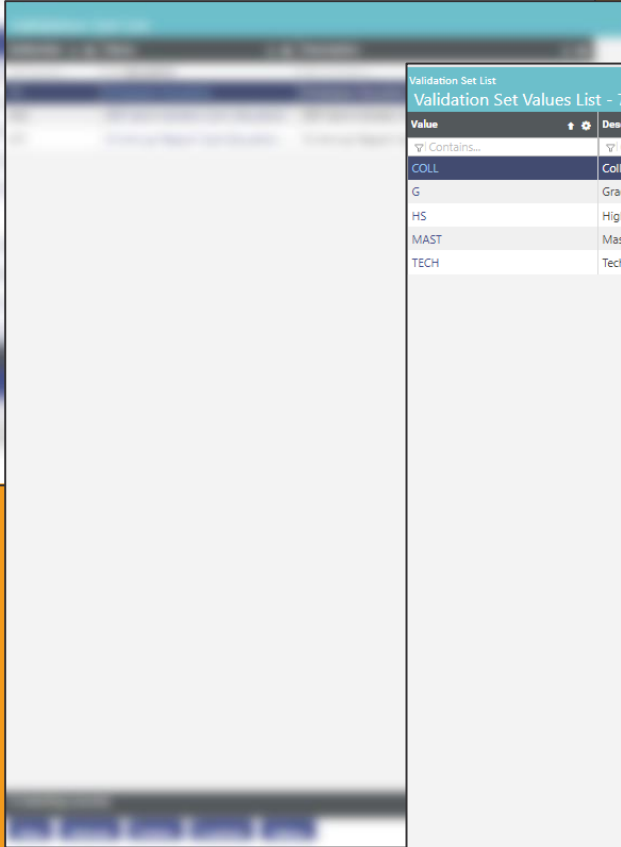
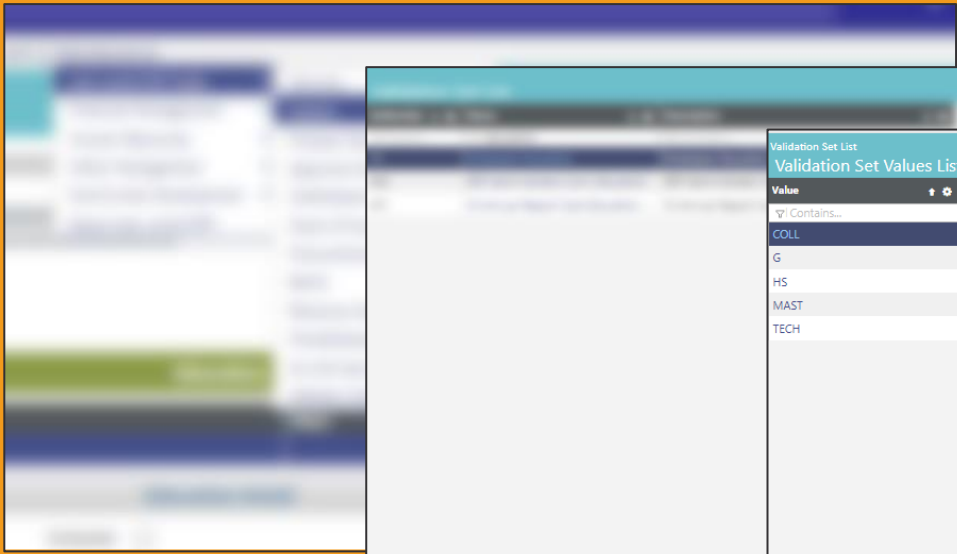
### Validation Set List

SetNumber	Name	Description
71	Employee Education	Employee Education
402	REP Administrator Cont. Education	REP Administrator Cont. Education
471	IN Annual Report Card Education ...	IN Annual Report Card Education Level

3 matching records

[New](#) [Refresh](#) [Delete](#) [Context](#) [Values](#)





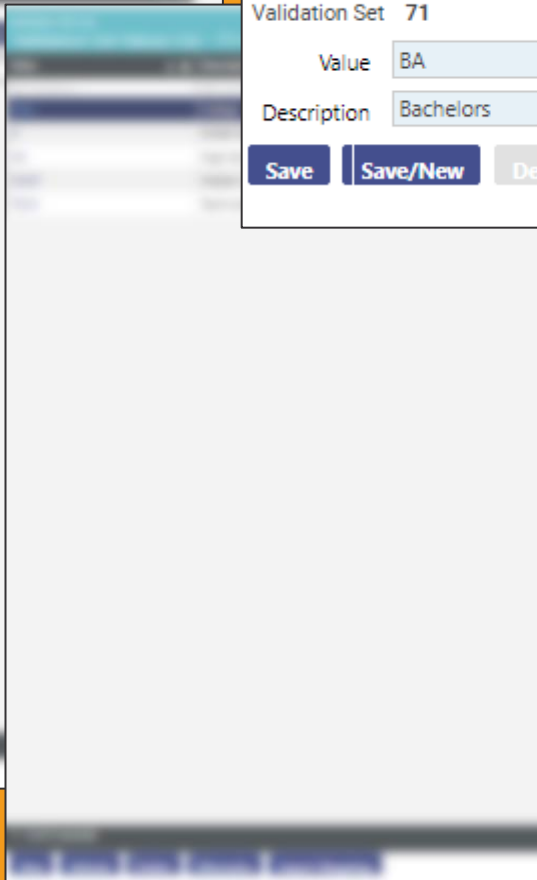
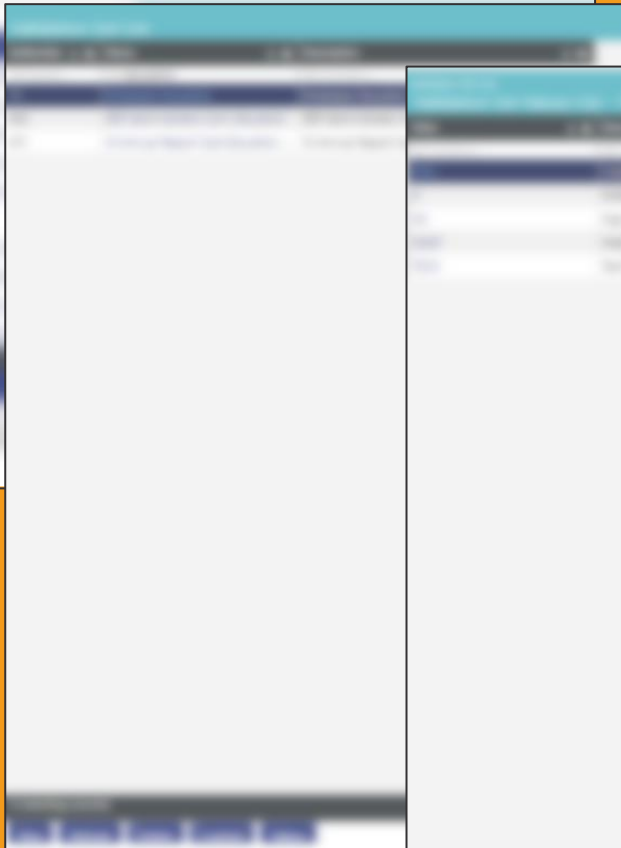
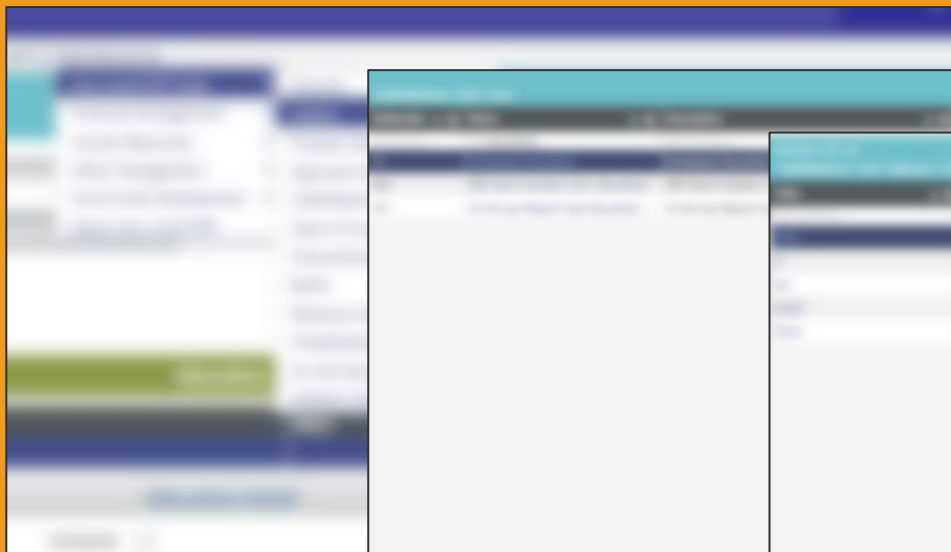
Validation Set List

Validation Set Values List - 71 Employee Education

Value	Description
TV Contains...	TV Contains...
COLL	College
G	Grade School
HS	High School
MAST	Master's Degree
TECH	Technical School

1 - 5 of 5 records

[New](#) [Refresh](#) [Delete](#) [Alternates](#) [Import Mappings](#)



Validation Set List > Validation Set Value List

### Validation Set Value - 71

Validation Set 71

Value

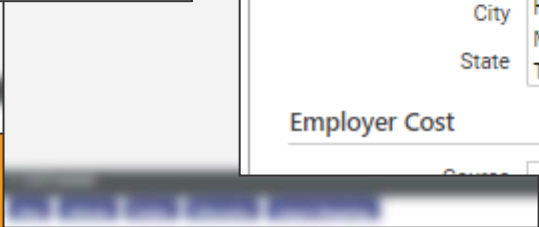
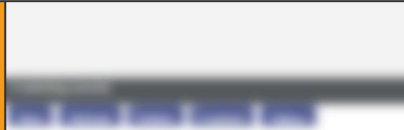
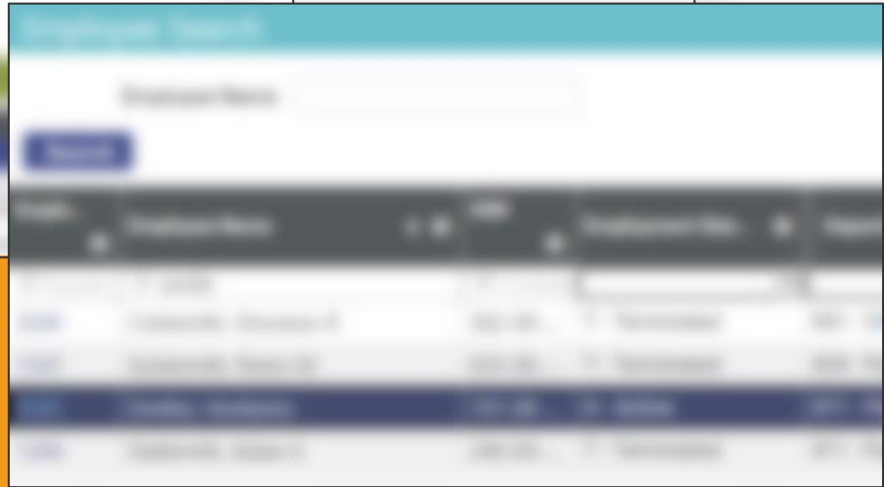
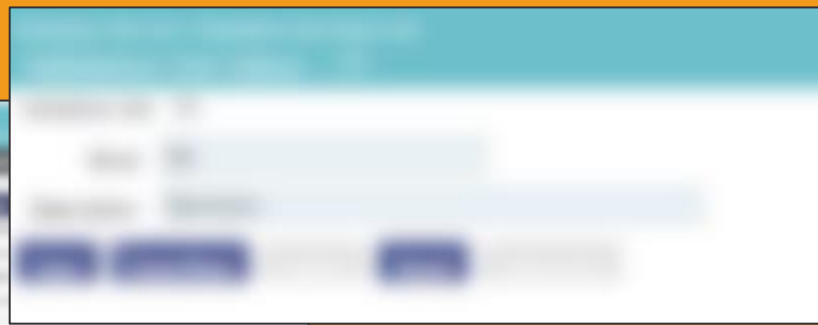
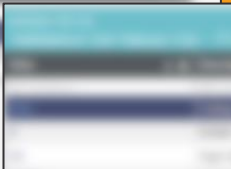
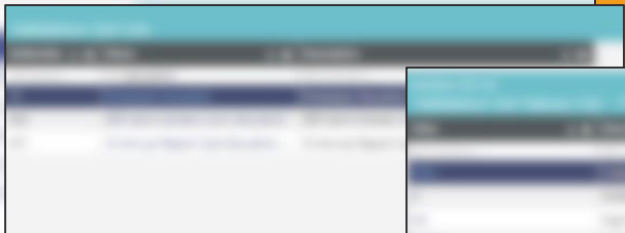
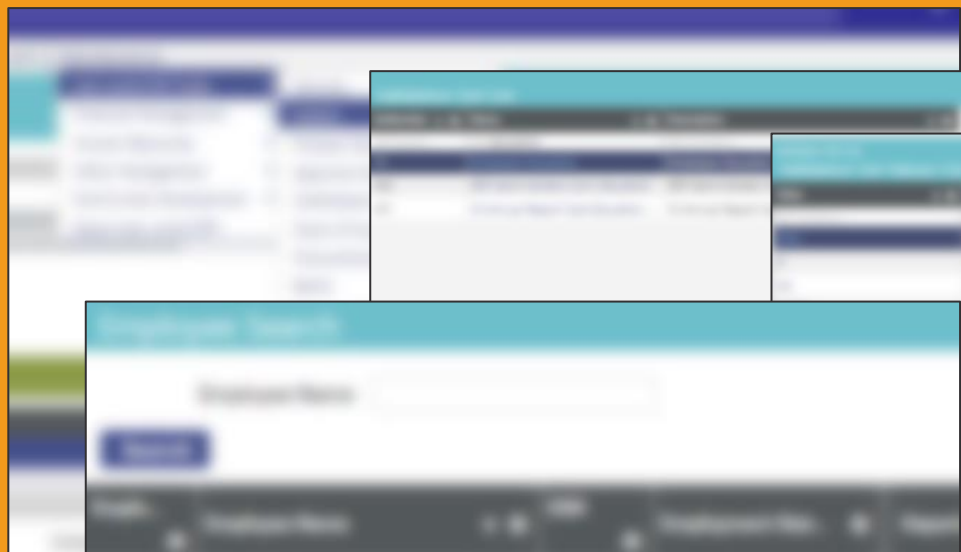
Description

## Employee Search

Employee Name

Search

Empl...	Employee Name	SSN	Employment Stat...	Depart
▽   Equals...	▽   smith	▽   Contain		
3640	Coldsmith, Vincenzo R	582-00-...	T - Terminated	061 - C
1547	Goldsmith, Pedro M	655-00-...	T - Terminated	424 - P
4285	Smithe, Heriberto	191-00-...	A - Active	411 - P
1284	Stallsmith, Aidan K	246-00-...	T - Terminated	411 - P



Personal | Employment | Jobs | Payroll Data | Contracts

Education Type	Institution

Save | Save/New | Cancel

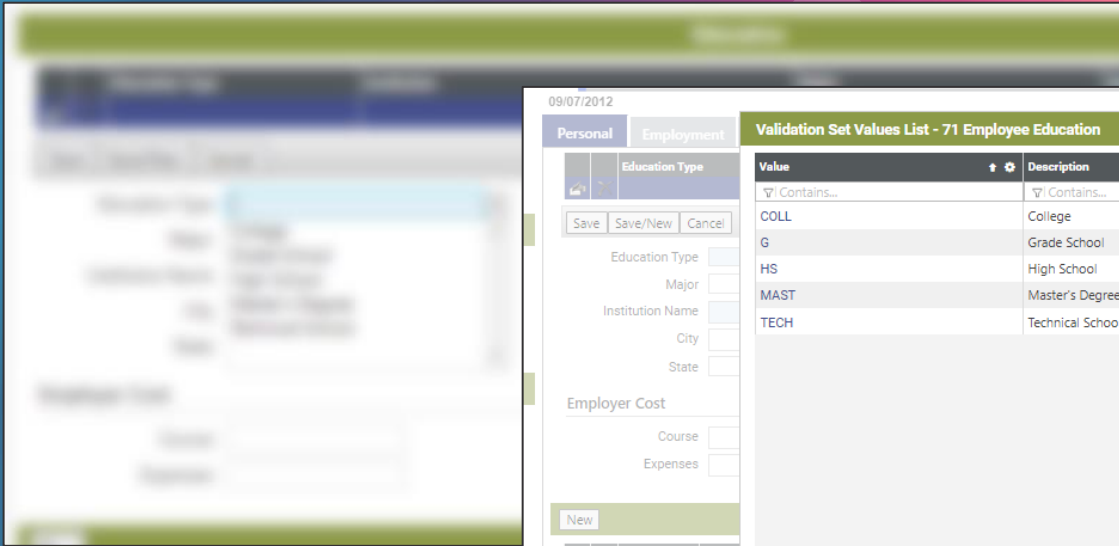
Education Type |  
Major Bachelors  
Institution Name College  
City Grade School  
State High School  
Technical School

Employer Cost

Education				
	Education Type	Institution	Major	De
Save Save/New Cancel				
Education Detail				
Education Type	<input type="text"/>	Graduate	<input type="checkbox"/>	
Major	College	Attendance Start Date	<input type="text"/>	<input type="text"/>
Institution Name	Grade School	Attendance End Date	<input type="text"/>	<input type="text"/>
City	High School	GPA	<input type="text"/>	
State	Master's Degree			
	Technical School			
Employer Cost		Employee Cost		
Course	<input type="text"/>	Course	<input type="text"/>	
Expenses	<input type="text"/>	Expenses	<input type="text"/>	

With your cursor in the field you need a new validation value:

Hold the Ctrl key on your keyboard and Left Click with your mouse



09/07/2012

Personal Employment

Education Type

Save Save/New Cancel

Education Type

Major

Institution Name

City

State

Employer Cost

Course

Expenses

New

Primary Email T

New

Primary Phone

New

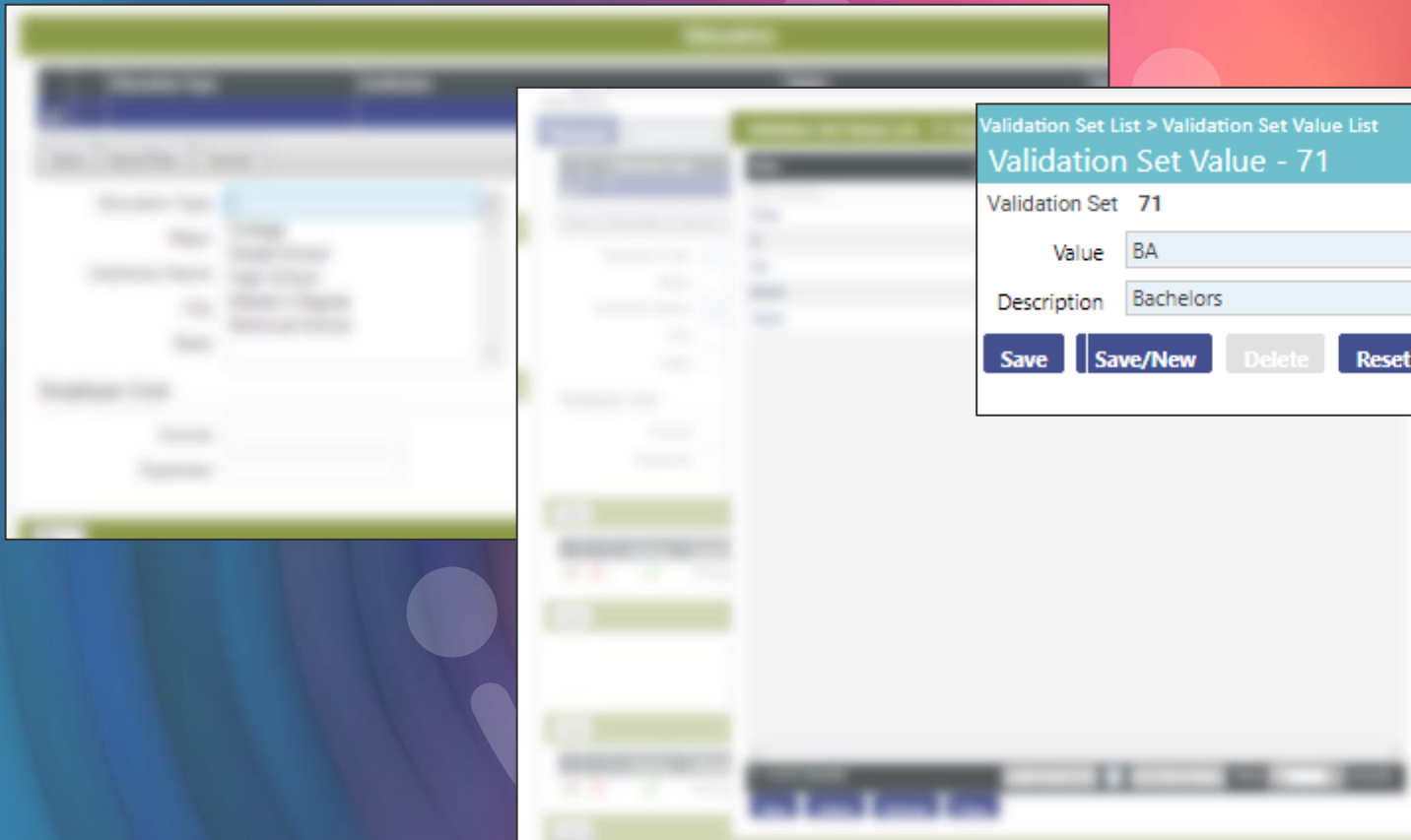
Validation Set Values List - 71 Employee Education

Value	Description
▽ Contains...	▽ Contains...
COLL	College
G	Grade School
HS	High School
MAST	Master's Degree
TECH	Technical School

1 - 5 of 5 records

Show 50 records

New Delete Refresh Close



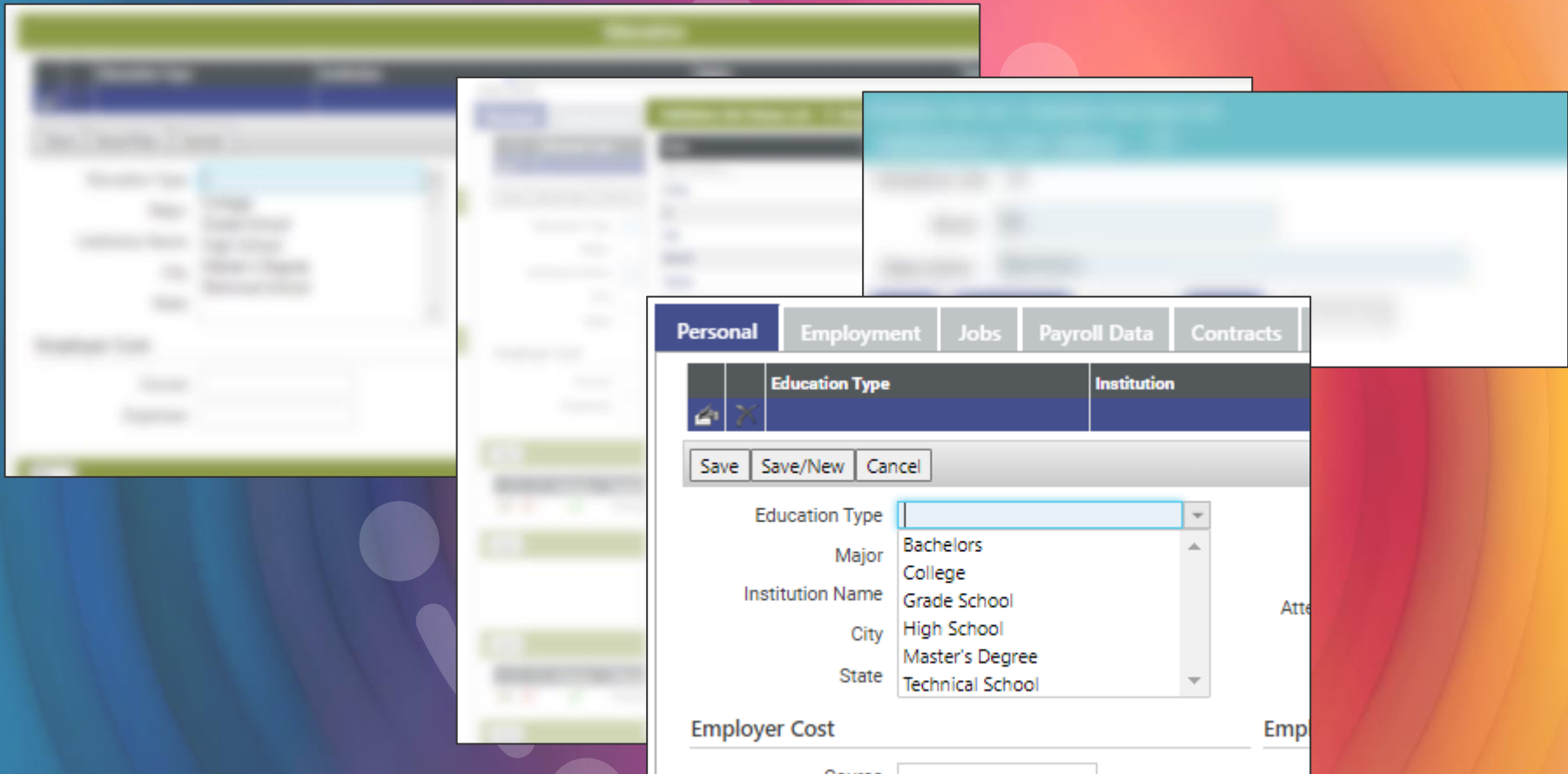
Validation Set List > Validation Set Value List

## Validation Set Value - 71

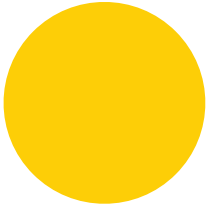
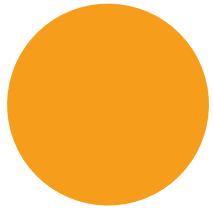
Validation Set 71

Value

Description







# Using Grids to Maximize Your Time

## Why?

- ❖ Quick way to see information
- ❖ Retain filters while making mass changes
- ❖ Export a list

## Where?

- ❖ Workforce
- ❖ Deduction & Benefit Codes
- ❖ Positions
- ❖ Many More!



Employee Search

Employee Name

Search

Employee N...	Employee Name	Employment Status	Department	Title	Benefit Group	Status
2865	Abarca, Leticia	A - Active	170 - Street Department	170-026-002 - Working Crew Leader	11 - USW Local 6621	
254	Abare, Amos E	R - Retired	061 - Clerk of Courts	Grade 17	99 - Part Time Employees	
468	Abare, Lucy J	R - Retired	130 - Police Officers	Patrolman A	99 - Part Time Employees	
2435	Abboud, Adrian	T - Terminated	190 - Building Department	Chief Building Official	99 - Part Time Employees	
3894	Abboud, Adrian	T - Terminated	203 - Building Maintenance	203-133-001 - Seasonal	99 - Part Time Employees	
1300	Abela, Syed K	T - Terminated	424 - Parks - Summer Playground	\$6.00 hourly rate	99 - Part Time Employees	
210	Abela, Syed M	R - Retired	061 - Clerk of Courts	Grade 14	8 - Reg emp - Personal bonus	
2333	Abelman, Barbara	T - Terminated	020 - Auditor's Office	020-024-002 - Asst Deputy Aud 2 - Fin Report	1 - Regular Employees	
4267	Abes, Maranda	A - Active	190 - Building Department	190-026-005 - Housing Inspector	11 - USW Local 6621	
3769	Abigantus, Darian E	T - Terminated	411 - Parks - Auxiliary Police	Auxiliary	99 - Part Time Employees	
2334	Aboullissan, Stuart	T - Terminated	501 - Block Grant	minimum wage	99 - Part Time Employees	
402	Abram, Antwan F	R - Retired	140 - Fire Department	Firefighter - 102 hrs.	2 - Firemen	
1862	Abramek, Paula	T - Terminated	424 - Parks - Summer Playground	\$6.00 hourly rate	99 - Part Time Employees	
1403	Abramek, Paula F	T - Terminated	423 - Parks - Umpires & Referees	\$10.00 per game	99 - Part Time Employees	
2821	Acedo, Malia	T - Terminated	312 - UT Distribution	minimum wage	99 - Part Time Employees	
3413	Acey, Cindy E	A - Active	170 - Street Department	170-026-006 - Working Crew Leader	11 - USW Local 6621	
3595	Achille, Johanna	T - Terminated	410 - Parks - General Administratio	410-123-001 - Seasonal	99 - Part Time Employees	
4061	Achzet, Triston	RES - Resigned	501 - Block Grant	501-916-001 - Director	12 - Mgt. Group	
4077	Ackerley, Lorena	RES - Resigned	LMHA - Police Other	LMHA	LMHA - Sntztd metropolitan Housin	
3082	Ackermann, Alexandro	T - Terminated	170 - Street Department	minimum wage	99 - Part Time Employees	
2240	Ackins, Everett	T - Terminated	424 - Parks - Summer Playground	\$7.00 hourly rate	99 - Part Time Employees	

# Grid Columns

Employee Search

Employee Name

Search

Emplo...	Employee Name	SSN	Employment Stat...	Department	Title	Benefit Group	Status
▽   Equals...	▽   Contains...	▽   Contain			▽   Contains...		

Deduction List

Active	Code	Description	Last Processed Date	Calculation Method
▽	▽   Contains...	▽   Contains...	▽   Contains...	▽   Contains...

Hours Codes List

Active	Hours Code	Description	Hours Category	Pay Type	Last Processed Date
▽	▽   Contains...	▽   Contains...	▽   Contains...	▽   Contains...	▽   On...



Employee Name  

Employee Name  
▼   Contains...
Atzhorn, Bryanna
Aumann, Silas I
Aurrichio, Kaila Junior
Ausmus, Cecelia
Auxilien, Duane J
Avon, Julianne
Ax, Quinten
Ayala, Aylin
Ayala, Aylin A
Aydelott, Imani
Ayersman, Quinten
Ayo, Ann
Batz, Chandler M
Babauta, Frank A

# Sort



**Benefit Group**

5 - Elected Officials

- 48HR - 48 Hour Em
- 48NL - 48 Hour Em
- 5 - Elected Officials
- 5C - Elected Officia
- 6 - 60 Hr.\Pay emp
- 6NL - 60 Hr.\Pay N
- 7 - Court city/cnty

**Employment Stat...**

A - Active,

- A - Active
- I - Inactive
- R - Retired
- RES - Resigned
- T - Terminated

# Filter on One or More

# Employee Search

Employee Name

**Search**

Employ...	Employee Name	Employment Status	Department	Title	Benefit Group	Status
▽   Equals...	▽   Contains...	A - Active		▽   Contains...	5 - Elected Officials	
4170	Beecken, Marlon	A - Active	001 - Council	001-059-002 - Council Person	5C - Elected Officials paid	
186	Cutrell, Keith	A - Active	001 - Council	001-059-005 - Council Person	5C - Elected Officials paid	
3741	Debeaumont, Dayana	A - Active	001 - Council	001-059-003 - Council Person	5C - Elected Officials paid	
3021	Difranco, Tori D	A - Active	041 - Legal	041-057-001 - Law Director	5 - Elected Officials	
246	Eversmeyer, Kacey A	A - Active	020 - Auditor's Office	020-064-001 - City Auditor	5 - Elected Officials	
2183	Gonzalez, Nadine	A - Active	011 - Mayor's Office	011-067-001 - Mayor	5 - Elected Officials	
4169	Kreamalmeyer, Armani J	A - Active	001 - Council	001-059-004 - Council Person	5C - Elected Officials paid	
3536	Leeks, Destini	A - Active	001 - Council	001-059-008 - Council Person	5C - Elected Officials paid	
4018	Maiello, Johanna J	A - Active	001 - Council	001-059-011 - Council Person at La...	5C - Elected Officials paid	
529	Narvaiz, Dominique J	A - Active	051 - Judicial - #1	051-001-001 - Judge	5 - Elected Officials	
3956	Stank, Jaime T Third	A - Active	061 - Clerk of Courts	061-063-001 - Clerk of Courts	5 - Elected Officials	
2034	Thuman, Meagan J	A - Active	055 - Judicial - #2	055-001-001 - Judge	5 - Elected Officials	
1205	Tolin, Fidel M	A - Active	030 - Treasurer's Office	030-058-001 - Treasurer	5 - Elected Officials	
3017	Tueller, Misty P	A - Active	001 - Council	001-060-001 - Council President	5C - Elected Officials paid	
3858	Washabaugh, Adolfo	A - Active	001 - Council	001-059-001 - Council Person	5C - Elected Officials paid	

15 matching records

## Scenario:

Your Elected Officials will be receiving a new Life Insurance benefit effective June 1st. The benefit code is created and must be added to the appropriate employees.



## Employee Search

Employee Name

Search

Empl...	Employee Name	SSN	Employment Stat...	Department	Title	Benefit Group
▼   Equals...	▼   Contains...	▼   Contain	A - Active		▼   Contains...	5 - Elected Offici
3021	Difranco, Tori D	583-00-...	A - Active	041 - Legal	041-057-001 - Law Director	5 - Elected Officials
246	Eversmeyer, Kacey A	861-00-...	A - Active	020 - Auditor's Office	020-064-001 - City Auditor	5 - Elected Officials
2183	Gonzale, Nadine	542-00-...	A - Active	011 - Mayor's Office	011-067-001 - Mayor	5 - Elected Officials
529	Narvaiz, Dominique J	140-00-...	A - Active	051 - Judicial - #1	051-001-001 - Judge	5 - Elected Officials
3956	Stank, Jaime T Third	149-00-...	A - Active	061 - Clerk of Courts	061-063-001 - Clerk of Courts	5 - Elected Officials
2034	Thuman, Meagan J	083-90-...	A - Active	055 - Judicial - #2	055-001-001 - Judge	5 - Elected Officials
1205	Tolin, Fidel M	375-00-...	A - Active	030 - Treasurer's Office	030-058-001 - Treasurer	5 - Elected Officials

7 matching records

← Prev 1 Next → Show

Employee Search

Diffrancisco, Tori D (3021) ▼

- Diffrancisco, Tori D (3021)
- Eversmeyer, Kacey A (246)
- Gonzale, Nadine (2183)
- Narvaiz, Dominique J (529)
- Stank, Jaime T Third (3956)
- Thuman, Meagan J (2034)
- Tolin, Fidel M (1205)

Common Links

- Documents

02/29/2008 02/26/2010 07/

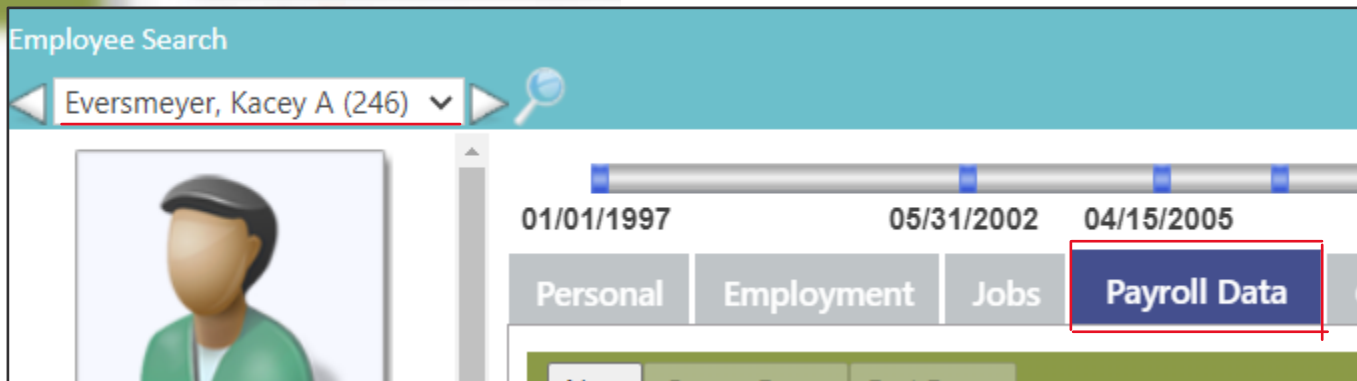
Personal Employment Jobs

New Create Event End Event

			Deduction	Sequ
<input type="checkbox"/>			10 - Deduction 5	11
<input type="checkbox"/>			7 - Deduction 60	7

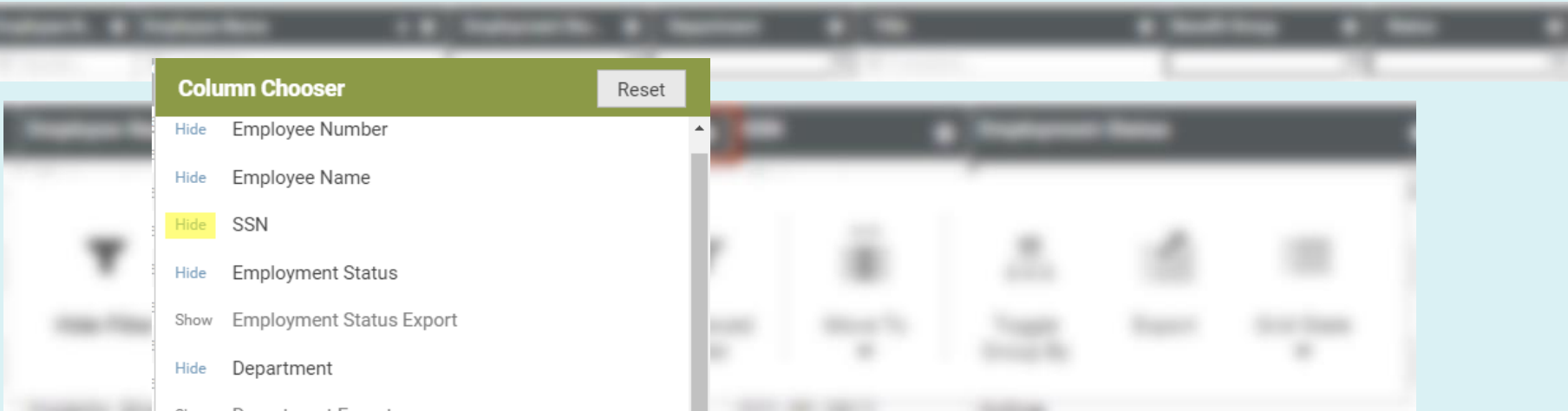
The results of the filter from the Employee Search grid are retained.

You also retain the tab you last worked in for less “clicking”.



# Feature Chooser





# Hide Columns

**Column Chooser** Reset

- Hide Employee Number
- Hide Employee Name
- Hide** SSN
- Hide Employment Status
- Show Employment Status Export
- Hide Department
- Show Department Export
- Hide Title
- Hide Benefit Group
- Show Benefit Group Export
- Hide Status
- Hide Hire Date

**Apply** **Cancel**

# Employee Search

Employee Name

**Search**

Employ...	Employee Name	Employment Status	Department	Title	Benefit Group	Status
▽   Equals...	▽   Contains...	A - Active		▽   Contains...	5 - Elected Officials	
4170	Beecken, Marlon	A - Active	001 - Council	001-059-002 - Council Person	5C - Elected Officials paid	
186	Cutrell, Keith	A - Active	001 - Council	001-059-005 - Council Person	5C - Elected Officials paid	
3741	Debeaumont, Dayana	A - Active	001 - Council	001-059-003 - Council Person	5C - Elected Officials paid	
3021	Difranco, Tori D	A - Active	041 - Legal	041-057-001 - Law Director	5 - Elected Officials	
246	Eversmeyer, Kacey A	A - Active	020 - Auditor's Office	020-064-001 - City Auditor	5 - Elected Officials	
2183	Gonzalez, Nadine	A - Active	011 - Mayor's Office	011-067-001 - Mayor	5 - Elected Officials	
4169	Kreamalmeyer, Armani J	A - Active	001 - Council	001-059-004 - Council Person	5C - Elected Officials paid	
3536	Leeks, Destini	A - Active	001 - Council	001-059-008 - Council Person	5C - Elected Officials paid	
4018	Maiello, Johanna J	A - Active	001 - Council	001-059-011 - Council Person at La...	5C - Elected Officials paid	
529	Narvaiz, Dominique J	A - Active	051 - Judicial - #1	051-001-001 - Judge	5 - Elected Officials	
3956	Stank, Jaime T Third	A - Active	061 - Clerk of Courts	061-063-001 - Clerk of Courts	5 - Elected Officials	
2034	Thuman, Meagan J	A - Active	055 - Judicial - #2	055-001-001 - Judge	5 - Elected Officials	
1205	Tolin, Fidel M	A - Active	030 - Treasurer's Office	030-058-001 - Treasurer	5 - Elected Officials	
3017	Tueller, Misty P	A - Active	001 - Council	001-060-001 - Council President	5C - Elected Officials paid	
3858	Washabaugh, Adolfo	A - Active	001 - Council	001-059-001 - Council Person	5C - Elected Officials paid	

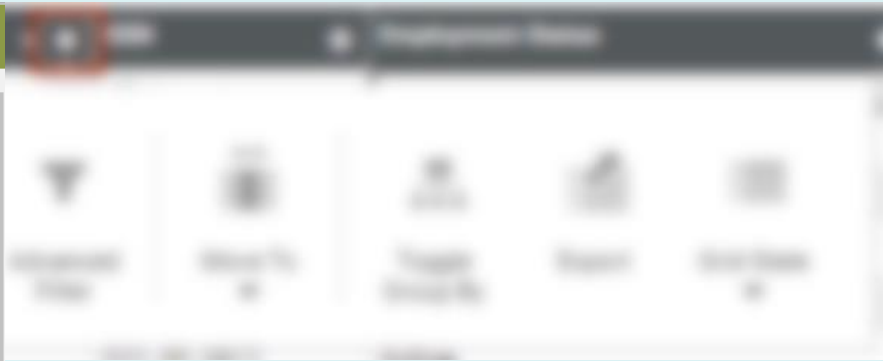
15 matching records

←
◀ Prev
1
Next ▶
→
Show 50
▼
records

**Column Chooser** Reset

- Hide Employee Number
- Hide Employee Name
- Show **SSN**
- Show Employment Status
- Show Employment Status Export
- Hide Department
- Show Department Export
- Hide Title
- Show Benefit Group
- Show Benefit Group Export
- Show Status
- Show Hire Date

Apply Cancel

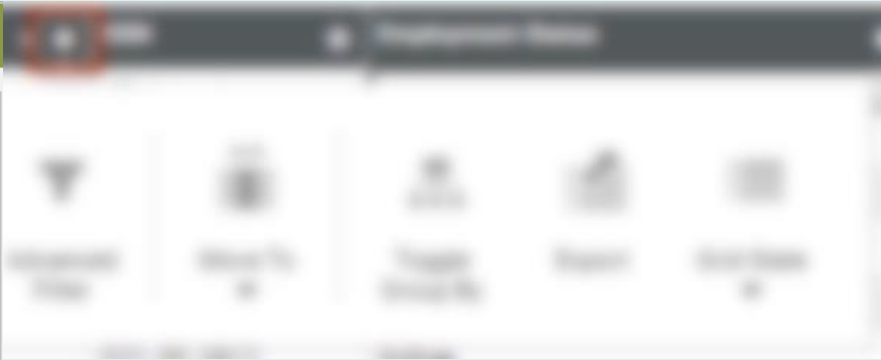


Click Show to bring  
the column back into  
the list or...

**Column Chooser** Reset

- Hide Employee Number
- Hide Employee Name
- Show SSN
- Show Employment Status
- Show Employment Status Export
- Hide Department
- Show Department Export
- Hide Title
- Show Benefit Group
- Show Benefit Group Export
- Show Status
- Show **Hire Date**

Apply Cancel



# To Add Hire Date to Your Grid



# Employee Search

Employee Name

**Search**

Empl...	Employee Name	Employment St...	Department	Title	Benefit Group	Status	Hire Date
▽  Equals	▽  Contains...	A - Active		▽  Contains...	5 - Elected Offic		▽  On...
4170	Beecken, Marlon	A - Active	001 - Council	001-059-002 - Council Person	5C - Elected Officials		01/01/2022
186	Cutrell, Keith	A - Active	001 - Council	001-059-005 - Council Person	5C - Elected Officials		01/23/1974
3741	Debeaumont, Dayana	A - Active	001 - Council	001-059-003 - Council Person	5C - Elected Officials		01/01/2016
3021	Difranco, Tori D	A - Active	041 - Legal	041-057-001 - Law Director	5 - Elected Officials		03/01/2008
246	Eversmeyer, Kacey A	A - Active	020 - Auditor's Office	020-064-001 - City Auditor	5 - Elected Officials		05/19/1986
2183	Gonzale, Nadine	A - Active	011 - Mayor's Office	011-067-001 - Mayor	5 - Elected Officials		02/16/1999
4169	Kreamalmeyer, Armani J	A - Active	001 - Council	001-059-004 - Council Person	5C - Elected Officials		01/01/2022
3536	Leeks, Destini	A - Active	001 - Council	001-059-008 - Council Person	5C - Elected Officials		01/01/2014
4018	Maiello, Johanna J	A - Active	001 - Council	001-059-011 - Council Person ...	5C - Elected Officials		07/01/2019
529	Narvaiz, Dominique J	A - Active	051 - Judicial - #1	051-001-001 - Judge	5 - Elected Officials		04/01/1992
3956	Stank, Jaime T Third	A - Active	061 - Clerk of Courts	061-063-001 - Clerk of Courts	5 - Elected Officials		01/13/2019
2034	Thuman, Meagan J	A - Active	055 - Judicial - #2	055-001-001 - Judge	5 - Elected Officials		01/01/2004
1205	Tolin, Fidel M	A - Active	030 - Treasurer's Office	030-058-001 - Treasurer	5 - Elected Officials		08/06/2007
3017	Tueller, Misty P	A - Active	001 - Council	001-060-001 - Council President	5C - Elected Officials		02/01/2008
3858	Washabaugh, Adolfo	A - Active	001 - Council	001-059-001 - Council Person	5C - Elected Officials		01/01/2018

15 matching records

Show  records






Employee Name  SSN  Employment Status 

 Move To  Toggle Group By  Export  Grid State

**Export Options** 

Export Type

All Pages  Current Page

Export Format

Excel Workbook (\*.xlsx)  Excel 97-2003 Workbook (\*.xls)

**Export** **Cancel**

# Export for a Quick List

A1

	A	B	C	D	E	F	G
1	Employee	Employee Name	Employment Status	Department	Title	Benefit Group	Status
2	4170	Beecken, Marlon	636	18	001-059-002 - Council Person		43
3	186	Cutrell, Keith	636	18	001-059-005 - Council Person		43
4	3741	Debeaumont, Dayana	636	18	001-059-003 - Council Person		43
5	3021	Difranco, Tori D	636	24	041-057-001 - Law Director		42
6	246	Eversmeyer, Kacey A	636	22	020-064-001 - City Auditor		42
7	2183	Gonzalez, Nadine	636	20	011-067-001 - Mayor		42
8	4169	Kreamalmeyer, Armani J	636	18	001-059-004 - Council Person		43
9	3536	Leeks, Destini	636	18	001-059-008 - Council Person		43
10	4018	Maiello, Johanna J	636	18	001-059-011 - Council Person a		43
11	529	Narvaiz, Dominique J	636	26	051-001-001 - Judge		42
12	3956	Stank, Jaime T Third	636	28	061-063-001 - Clerk of Courts		42
13	2034	Thuman, Meagan J	636	27	055-001-001 - Judge		42
14	1205	Tolin, Fidel M	636	23	030-058-001 - Treasurer		42
15	3017	Tueller, Misty P	636	18	001-060-001 - Council President		43
16	3858	Washabaugh, Adolfo	636	18	001-059-001 - Council Person		43

Employee Search

Employee Name

Search

Employee N...	Employee Name	Employment Status	Department	Title	Benefit Group	Hire Date
2865	Abarca, Leticia	A - Active	170 - Street Department	170-026-002 - Working Crew Leader	11 - USW Local 6621	12/04/2006
4267	Abes, Maranda	A - Active	190 - Building Department	190-026-005 - Housing Inspector	11 - USW Local 6621	11/21/2022
3413	Acey, Cindy E	A - Active	170 - Street Department	170-026-006 - Working Crew Leader	11 - USW Local 6621	09/10/2012
3840	Aguiler, Lilian	A - Active	501 - Block Grant	501-028-001 - Comm Dev Analyst	12B - Mgt. Group w/Bonus Sick	09/26/2017
1839	Ahlgren, Jakayla	A - Active	042 - Prosecutor's Office	042-999-002 - Victim Advocate	8 - Reg emp. - Personal bonus	08/24/1995
729	Ahyou, Dwayne S	A - Active	130 - Police Officers	130-103-045 - Police Officer	3 - Regular Police	09/06/1992
4314	Aikman, Antony	A - Active	190 - Building Department	190-018-004 - Secretary	11 - USW Local 6621	05/22/2023
3778	Aki, Zachariah C	A - Active	240 - Engineering Department	240-010-001 - Engineer 2	12B - Mgt. Group w/Bonus Sick	02/20/2017
4237	Akinrefon, Dorothy	A - Active	143 - Fire Levy	141-202-013 - Fire Levy Firefighter	2 - Firemen	08/07/2022
3009	Alaibilla, Elian	A - Active	301 - UT Admin	301-027-001 - Pur and Inv Clerk	11 - USW Local 6621	01/14/2008
4072	Alstott, Makenzie	A - Active	312 - UT Distribution	312-024-002 - Line Mechanic	11 - USW Local 6621	04/13/2020
3149	Alt, Wayne	A - Active	LMHA - Police Other	Sntzd Metro Housing	LMHA - Sntzd metropolitan Housi	01/03/2005
4283	Altobelli, Anaya L	A - Active	140 - Fire Department	140-205-004 - Fire Fighter ARPA	2 - Firemen	01/31/2023
2736	Alvord, Erin	A - Active	130 - Police Officers	130-103-055 - Police Officer	3 - Regular Police	09/12/2005
671	Amerine, Brennon M	A - Active	201 - Safety / Service	201-004-001 - Chief Deputy Safety Service Dir.	SSBS - Safety Service Bonus Sick	04/02/1990
3822	Amlin, Tyree	A - Active	305 - UT Purification	305-010-001 - Cleaner	11 - USW Local 6621	06/19/2017
101	Amlin, Tyree	A - Active	041 - Legal	041-901-001 - Admin Asst I / Office Manager	8 - Reg emp. - Personal bonus	04/28/2008
3450	Amyx, Fabiola	A - Active	203 - Building Maintenance	203-010-001 - Matron/Cleaner	11 - USW Local 6621	03/18/2013
3552	Angevine, Myron	A - Active	411B - Aux Police Outside Work	Auxi Outside Work	22 - Aux. Police	03/03/2000
2732	Appelt, Tate	A - Active	170 - Street Department	170-022-009 - Motor Equipment Operator 1	11 - USW Local 6621	09/08/2005
2481	Arciola, Tristian	A - Active	130 - Police Officers	130-110-009 - Police Sergeant	3 - Regular Police	09/12/2005
3998	Arenson, Mollie A	A - Active	411 - Parks - Auxiliary Police	auxiliary	99 - Part Time Employees	06/07/2019
4273	Argudo, Bernardo	A - Active	410 - Parks - General Administrat	410-011-003 - Laborer Class 1	11 - USW Local 6621	12/19/2022
3488	Armbrust, Alessandro	A - Active	332 - UT River	332-028-002 - Operator Class 3	11 - USW Local 6621	06/03/2013

658 matching records

1 of 14 Pg 1 of 14 Next Show 50 records

Create Hired Applicants Delete

# Feature Chooser

The screenshot displays a data table with columns for Title, Benefit Group, and Hire Date. A feature chooser menu is overlaid on the table, providing various interaction options. The 'Grid State' menu is currently open, showing options to save settings, reset to defaults, or view defaults.

	Title	Benefit Group	Hire Date
Office	042-999-002 - Victim Advocate	8 - Reg emp. - Personal bonus	08/24/1995
s	130-103-045 - Police Officer	3 - Regular Police	09/06/1992
rtment	190-018-004 - Secretary	11 - USW Local 6621	05/22/2023
epartment	240-010-001 - Engineer 2	12B - Mgt. Group w/Bonus Sick	02/20/2017
	141-202-012 - Fire Loss Firefighter	2 - Firemen	08/07/2023

# Imports

- ❖ Import Benefit Data
- ❖ Import Deduction Data
- ❖ Import Adjustments
- ❖ Third Party Hours Import

## Scenario:

All full-time employees will be receiving a new Life Insurance benefit effective June 1st. The benefit code is created and must be added to the appropriate employees.

# Employee Search

Employee Name

**Search**

Empl...	Employee Name	SSN	Employment Stat...	Department	Title	Benefit Group
▽   Equals...	▽   Contains...	▽   Contain	A - Active		▽   Contains...	1 - Regular Empl
2865	Abarca, Leticia	553-00-...	A - Active	170 - Street Departmen	170-026-002 - Working Crew Le...	11 - USW Local 6621
4267	Abes, Maranda	879-00-...	A - Active	190 - Building Departm	190-026-005 - Housing Inspector	11 - USW Local 6621
3413	Acey, Cindy E	259-00-...	A - Active	170 - Street Departmen	170-026-006 - Working Crew Le...	11 - USW Local 6621
3840	Aguiler, Lilian	837-00-...	A - Active	501 - Block Grant	501-028-001 - Comm Dev Analyst	12B - Mgt. Group w/Bo
729	Ahyou, Dwayne S	679-00-...	A - Active	130 - Police Officers	130-103-045 - Police Officer	3 - Regular Police
4314	Aikman, Antony	416-00-...	A - Active	190 - Building Departm	190-018-004 - Secretary	11 - USW Local 6621
3778	Aki, Zachariah C	694-00-...	A - Active	240 - Engineering Depa	240-010-001 - Engineer 2	12B - Mgt. Group w/Bo
4237	Akinrefon, Dorothy	217-00-...	A - Active	143 - Fire Levy	141-202-013 - Fire Levy Firefighter	2 - Firemen
3009	Alaibilla, Elian	582-00-...	A - Active	301 - UT Admin	301-027-001 - Pur and Inv Clerk	11 - USW Local 6621
4072	Alstott, Makenzie	377-00-...	A - Active	312 - UT Distribution	312-024-002 - Line Mechanic	11 - USW Local 6621
4283	Altobelli, Anaya L	230-00-...	A - Active	140 - Fire Department	140-205-004 - Fire Fighter ARPA	2 - Firemen
2736	Alvord, Erin	468-00-...	A - Active	130 - Police Officers	130-103-055 - Police Officer	3 - Regular Police
3822	Amlin, Tyree	446-00-...	A - Active	305 - UT Purification	305-010-001 - Cleaner	11 - USW Local 6621
3450	Amyx, Fabiola	383-00-...	A - Active	203 - Building Maintena	203-010-001 - Matron/Cleaner	11 - USW Local 6621
3552	Angevine, Myron	582-00-...	A - Active	411B - Aux Police Outsi	Auxi Outside Work	22 - Aux. Police
2732	Appelt, Tate	160-00-...	A - Active	170 - Street Departmen	170-022-009 - Motor Equipment...	11 - USW Local 6621

482 matching records

◀ ◀ Prev 1 2 3 4 5 Next ▶ ▶ Show



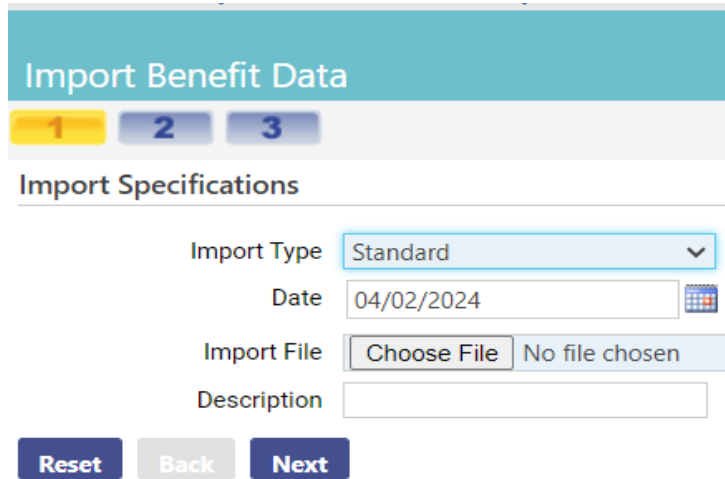
“

“It's not the load that breaks you down. It's the way you carry it.” - *Lena Horne*

”

# Import Benefit Data

Human Resources > Payroll Administrator Tasks > Import Benefit Data



Import Benefit Data

1 2 3

Import Specifications

Import Type Standard

Date 04/02/2024

Import File Choose File No file chosen

Description

Reset Back Next

- ❖ For Benefit Codes Only
- ❖ Cannot be in a Benefit Plan
- ❖ Can have different Start Date per Employee
- ❖ Can be Used to Stop Benefits in Workforce

# Is the Benefit Code Eligible for the Import?

**New World ERP** Search 48 N

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance Show Me

Benefit List  
Benefit

Code: LIFE  
Description: Life Insurance  
Active:   
**Include in Benefit Plan:**   
Include on Pay Stub:   
Last Processed Date: NOT USED  
Effective Date: [Calendar Icon] [Dropdown]  
Start Date: 01/01/2024 [Calendar Icon]  
Benefit Type: Life Insurance [Dropdown]  
Vendor: 6 - CIGNA GROUP INSURANCE [Dropdown]  
Default Frequency: ALL - Every [Dropdown]

Calculation Method: Flat Amount [Dropdown]  
Amount: \$6.58  
Overtime Maximum: [Input]  
Year-to-Date Limit: [Input]  
Life-to-Date Limit: [Input]

**Credit Distribution [Select One]**  
Account: 0680.0004 - Life Insurance [Dropdown]  
G/L Account: [Dropdown]

**Debit Distribution [Select One]**  
Account: 6100.2000 - Fringe Benefits [Dropdown]  
G/L Account: [Dropdown]

Split Between Fiscal Years:   
Distribute Cost To Override:   
Do Not Create Disbursement:

Imputed Income Setup  
Multiplier: [Input]  
Maximum Amount: [Input]  
Default Amount: [Input]

**Save** **Save/New** **Reset** Copy Calculation

# Creating the Import File

## Must

- ❖ Be a CSV file
- ❖ Include Benefit Code
- ❖ Include Employee Number

## Can

- ❖ Include Effective Date
- ❖ Include Override Amount/Percent
- ❖ Include Override Limit

## Note

- If the Override Amount/Percent is 0 (zero), the existing Benefit is stopped.
- If a default Amount/Percent is not provided on the code, it must be added as an Override.

## Employee Search

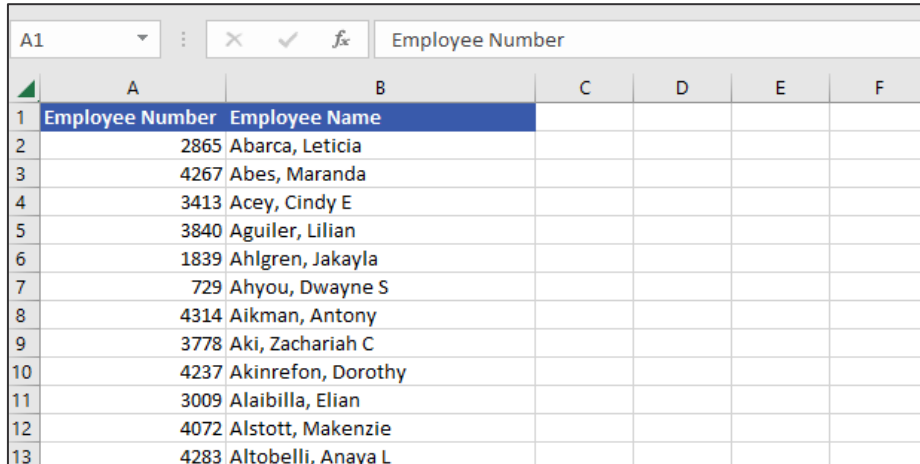
Employee Name

Search

Employee Number	Employee Name
▽   Equals...	▽   Contains...
2865	Abarca, Leticia
4267	Abes, Maranda
3413	Acey, Cindy E
3840	Aguiler, Lilian
1839	Ahlgren, Jakayla
729	Ahyou, Dwayne S

The image shows a software interface with a table header containing 'Employee Number' and 'Employee Name'. A settings gear icon is highlighted with a red box. Below the table, a toolbar contains several icons: a funnel for 'Advanced Filter', a box with arrows for 'Move To', a tree structure for 'Toggle Group By', a document with an arrow for 'Export' (highlighted with a red box), and a list icon for 'Grid State'. An 'Export Options' dialog box is open, featuring a green header with a close button and a vertical resize handle. The dialog includes sections for 'Export Type' with radio buttons for 'All Pages' (selected) and 'Current Page', and 'Export Format' with radio buttons for 'Excel Workbook (\*.xlsx)' (selected) and 'Excel 97-2003 Workbook (\*.xls)'. At the bottom of the dialog are 'Export' and 'Cancel' buttons.

# Creating the File to Import



	A	B	C	D	E	F
1	Employee Number	Employee Name				
2	2865	Abarca, Leticia				
3	4267	Abes, Maranda				
4	3413	Acey, Cindy E				
5	3840	Aguiler, Lilian				
6	1839	Ahlgren, Jakayla				
7	729	Ahyou, Dwayne S				
8	4314	Aikman, Antony				
9	3778	Aki, Zachariah C				
10	4237	Akinrefon, Dorothy				
11	3009	Alaibilla, Elian				
12	4072	Alstott, Makenzie				
13	4283	Altobelli, Anava L				

# Creating the File to Import

	A	B	C	D	E
1	Employee Number	Employee Name			
2	2865	Abarca, Leticia			
3	4267	Abes, Maranda			
4	3413	Acey, Cindy E			
5	3840	Aguiler, Lilian			
6	1839	Ahlgren, Jakayla			
7	729	Ahyou, Dwayne S			
8	4314	Aikman, Antony			
9	3778	Aki, Zachariah C			
10	4237	Akinrefon, Dorothy			
11	3009	Alaibilla, Elian			
12	4072	Alstott, Makenzie			
13	4283	Altobelli, Anava L			

A1						
	A	B	C	D	E	F
1	LIFE	2865				
2	LIFE	4267				
3	LIFE	3413				
4	LIFE	3840				
5	LIFE	1839				
6	LIFE	729				
7	LIFE	4314				
8	LIFE	3778				
9	LIFE	4237				
10	LIFE	3009				
11	LIFE	4072				
12	LIFE	4283				
13	LIFE	2736				




# Importing the Data

Import Benefit Data

1 2 3

Import Specifications

Import Type  ▼

Date  

Import File  No file chosen

Description

Choose “Standard” from the Import Type dropdown

# Importing the Data

**Import Benefit Data**

1 2 3

**Import Specifications**

Import Type: Standard

Date: 06/03/2024

Import File: Choose File No file chosen

Description:

Reset Back Next

Change your date to the first day of the pay period the benefit will begin

Note: If you added dates in your .csv file, they would override this date per employee.

# Importing the Data

Import Benefit Data

1 2 3

Import Specifications

Import Type

Date

Import File  Benefit Import.csv

Description

Click on Choose File to select the .csv file to be Imported

# Importing the Data

Import Benefit Data

1 2 3

Import Specifications

Import Type

Date

Import File  Benefit Import.csv

Description

Add a Unique Description

Click Next

# Importing the Data

Import Benefit Data

1 2 3

Import Summary

Records Validated 482

Records with Errors 0

Processing Options

- Import Benefit Data
- Print Edit Listing
- Print Error Listing

Benefit Data Validation Errors

Line Number	Message
	Contains...

Reset Back Finish

Click Finish

# Success!

Import Benefit Data		
1	2	3
<b>Processing Options</b>		
Records Processed 482		
<b>Benefit Data Process Errors</b>		
Line Number	Message	
	▽ Contains...	

# Always Double Check

## Employee Benefit Report

HR > Reports > Employee Reports > Employee Benefit Report

Employee Benefit Report

Load Saved Report

Override Report Title

Distribution Gro

Email Gro

Effective Date

Report Type

Select By

Sort

Employ

Primary Departments

Benefits

Employee Status

Available Benefit Code(s): 13

- 705 - Benefit 6
- 707 - Benefit 8
- 708 - Benefit 9
- 709 - Benefit 10
- 724 - Benefit 15
- 725 - Benefit 16
- 727 - Benefit 18
- 728 - Benefit 19
- 732 - Benefit 29
- 801 - Benefit 23
- 801-BHP - Benefit 27

Selected Benefit Code(s): 1

- LIFE - Life Insurance

Active Only

Employee Nu...	Employee...	Depe...	Department Des...	Calcula...	Benefit	Effective D...	End Date	Declined	Last Use...	Default Fre...	Default...	Def
2865	Abarca, Leticia	170	Street Department	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
4267	Abes, Maranda	190	Building Department	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
3413	Acey, Cindy E	170	Street Department	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
3840	Aguiler, Lilian	501	Block Grant	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
1839	Ahlgren, Jaka...	042	Prosecutor's Office	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
729	Ahyou, Dway...	130	Police Officers	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
4314	Aikman, Anto...	190	Building Department	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
3778	Aki, Zacharia...	240	Engineering Depar...	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
4237	Akinrefon, Do...	143	Fire Levy	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
3009	Alabilla, Elian	301	UT Admin	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
4072	Alstott, Make...	312	UT Distribution	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
4283	Altobelli, Ana...	140	Fire Department	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
2736	Alvord, Erin	130	Police Officers	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
3822	Amlin, Tyree	305	UT Purification	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
101	Amlin, Tyree	041	Legal	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
3450	Amyx, Fabiola	203	Building Maintenan...	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
3552	Angevine, My...	411B	Aux Police Outside ...	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
2732	Appelt, Tate	170	Street Department	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
2481	Arciola, Tristan	130	Police Officers	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
4273	Argudo, Bern...	410	Parks - General Ad...	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
3488	Armbrust, Ale...	332	UT River	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
3504	Aspden, Geor...	340	UT Landscape & Se...	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
3371	Ax, Quinten	140	Fire Department	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
923	Babauta, Fran...	130	Police Officers	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
917	Bacchus, Peyt...	140	Fire Department	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
4047	Badgley, Zoey	411B	Aux Police Outside ...	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
3012	Barnas, Jackie...	410	Parks - General Ad...	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
905	Bassi, Aiden P	190	Building Department	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
3707	Bastura, Regan	020	Auditor's Office	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
3766	Baumfalk, Tra...	332	UT River	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	
3659	Beach, Zion	332	UT River	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	\$6.58	

# Import Deduction Data

Human Resources > Payroll Administrator Tasks > Import Deduction Data

### Import Deduction Data

1 2 3

#### Import Specifications

Import Type: Standard

Date: 04/10/2024

Import File: Choose File No file chosen

Description:

Reset Back Next

- ❖ For Deduction Codes Only
- ❖ Cannot be in a Benefit Plan
- ❖ Can have different Start Date per Employee
- ❖ Can be Used to Stop Deductions in Workforce



# Creating the Import File

## Must

- ❖ Be a CSV file
- ❖ Include Deduction Code
- ❖ Include Employee Number

## Can

- ❖ Include Effective Date
- ❖ Include Override Amount/Percent
- ❖ Include Override Limit

## Note

- If the Override Amount/Percent is 0 (zero), the existing Deduction is stopped.
- If a default Amount/Percent is not provided on the code, it must be added as an Override.

## Scenario:

Employees enrolled in FSA must re-enroll every year. Enrollment occurs through the provider. To ensure that employees FSA deduction doesn't continue into the next year, you want to place an end date on the deduction in Workforce.

### Employee Deduction Report

Load Saved Report  Distribut

Override Report Title  Em

---

Effective Date

Report Type

Select By

---

Primary Departments  **Deductions**  Employee Status

---

Available Deduction Code(s): 179

- 1 - Deduction 4
- 101 - Deduction 6
- 102 - Deduction 7
- 10ROTH - Deduction 178
- 11 - Deduction 8
- 119 - Deduction 9
- 119B - Deduction 10
- 12 - Deduction 11
- 129 - Deduction 12
- 13 - Deduction 13
- 13A - Deduction 14

Selected Deduction Code(s):


- 10 - FSA Medical










Active Only

*Create the  
Employee  
Deduction  
Report as an  
Export to Begin  
Your Import File*

Employee Number	Empl...	Depa...	Departme...	Calculation...	Deduction	Effective Date	End Date	Declin...	Last Used In ...	Defa...	Default Freq...	Default ...	Default...
▽ Equals...	▽ Contain...	▽ Contain...	▽ Contain...	▽ Contain...	▽ Contain...	▽ On...	▽ On...	▽ Contain...	▽ On...	▽ Equal...	▽ Contain...	▽ Equals...	▽ Equals...
2865	Abarca, ...	170	Street Depar...	Flat Amount	10 - FSA Medical	02/02/2007	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
4267	Abes, M...	190	Building De...	Flat Amount	10 - FSA Medical	12/05/2022	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
1839	Ahlgren...	042	Prosecutor's ...	Flat Amount	10 - FSA Medical	03/06/2017	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
4314	Aikman...	190	Building De...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
3778	Aki, Zac...	240	Engineering ...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
4237	Akinref...	143	Fire Levy	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
3009	Alaibilla...	301	UT Admin	Flat Amount	10 - FSA Medical	02/13/2023	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
2736	Alvord, ...	130	Police Officers	Flat Amount	10 - FSA Medical	09/16/2019	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
671	Amerin...	201	Safety / Serv...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
2732	Appelt, ...	170	Street Depar...	Flat Amount	10 - FSA Medical	09/13/2021	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
2481	Arciola, ...	130	Police Officers	Flat Amount	10 - FSA Medical	02/13/2023	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
3488	Armbro...	332	UT River	Flat Amount	10 - FSA Medical	06/19/2023	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
3504	Aspden...	340	UT Landscap...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
4149	Astrup, ...	130	Police Officers	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
3371	Ax, Qui...	140	Fire Depart...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
905	Bassi, Ai...	190	Building De...	Flat Amount	10 - FSA Medical	03/01/2021	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
3707	Bastura...	020	Auditor's Off...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
3766	Baumfa...	332	UT River	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
3659	Beach, ...	332	UT River	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
4259	Bedson...	002	Clerk of Cou...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
2849	Belke, R...	240	Engineering ...	Flat Amount	10 - FSA Medical	01/31/2022	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
3776	Belluz, ...	335	UT Plant	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
827	Bermhar...	240	Engineering ...	Flat Amount	10 - FSA Medical	10/23/2023	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
2428	Biondol...	051	Judicial - #1	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
3339	Body, T...	130	Police Officers	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
4177	Bogatay...	130	Police Officers	Flat Amount	10 - FSA Medical	03/14/2022	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
4163	Bogumi...	302	UT - Billing	Flat Amount	10 - FSA Medical	07/03/2023	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
3567	Bolejac...	130	Police Officers	Flat Amount	10 - FSA Medical	04/12/2021	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
2041	Bomast...	240	Engineering ...	Flat Amount	10 - FSA Medical	04/10/2023	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
2363	Bora, Ta...	335	UT Plant	Flat Amount	10 - FSA Medical	10/29/2018	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
2941	Brancac...	041	Legal	Flat Amount	10 - FSA Medical	06/13/2016	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%

Employee Number	Empl...	Depa...	Departme...	Calculatio...	Deduction	Effective Date	End Date	Declin...	Last Used In ...	Defa...	Default Freq...	Default ...	Default...
▽ Equals...	▽ Contain...	▽ Contain...	▽ Contains...	▽ Contains...	▽ Contains...	▽ On...	▽ On...	▽ Contain...	▽ On...	▽ Equal...	▽ Contains...	▽ Equals...	▽ Equals...
2865	Abarca, ...	170	Street Depar...	Flat Amount	10 - FSA Medical	02/02/2007	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
4267	Abes, M...	190	Building De...	Flat Amount	10 - FSA Medical	12/05/2022	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
1839	Ahlgren...	042	Prosecutor's	Flat Amount	10 - FSA Medical	03/06/2017	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
4314	Aikman...	190	Building De...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
3778	Aki, Zac...	240	Engineering ...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
4237	Akinref...	143	Fire Levy	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
3009	Alaibilla...	301	UT Admin	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
2736	Alvord, ...	130	Police Officers	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
671	Amerin...	201	Safety / Serv...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
2732	Appelt, ...	170	Street Depar...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
2481	Arciola, ...	130	Police Officers	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
3488	Armbro...	332	UT River	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
3504	Aspden...	340	UT Landscap...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
4149	Astrup, ...	130	Police Officers	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
3371	Ax, Qui...	140	Fire Depart...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
905	Bassi, Ai...	190	Building De...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
3707	Bastura...	020	Auditor's Off...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
3766	Baumfal...	332	UT River	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
3659	Beach, ...	332	UT River	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
4259	Bedson...	002	Clerk of Cou...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
2849	Belke, R...	240	Engineering ...	Flat Amount	10 - FSA Medical	01/31/2022	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
3776	Belluz, ...	335	UT Plant	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
827	Bernhar...	240	Engineering ...	Flat Amount	10 - FSA Medical	10/23/2023	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
2428	Biondol...	051	Judicial - #1	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
3339	Body, T...	130	Police Officers	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	\$0.00	0.0000%
4177	Bogatay...	130	Police Officers	Flat Amount	10 - FSA Medical	03/14/2022	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
4163	Bogumi...	302	UT - Billing	Flat Amount	10 - FSA Medical	07/03/2023	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
3567	Bolejac...	130	Police Officers	Flat Amount	10 - FSA Medical	04/12/2021	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
2041	Bomast...	240	Engineering ...	Flat Amount	10 - FSA Medical	04/10/2023	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
2363	Bora, Ts...	335	UT Plant	Flat Amount	10 - FSA Medical	10/29/2018	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%
2941	Brancac...	041	Legal	Flat Amount	10 - FSA Medical	06/13/2016	12/31/9999	No	12/17/2023	11	ALL - Every	\$0.00	0.0000%

Employee Number  Employee Name

 Hide Filter |
  Hide |
  Column Chooser |
  Sort on Multiple |
  Advanced Filter |
  Move To |
  Toggle Group By |
  Export |
  Grid State

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F
1	10	2865			0	
2	10	4267			0	
3	10	1839			0	
4	10	4314			0	
5	10	3778			0	
6	10	4237			0	
7	10	3009			0	
8	10	2736			0	
9	10	671			0	
10	10	2732			0	
11	10	2481			0	
12	10	3488			0	
13	10	3504			0	
14	10	4149			0	
15	10	3371			0	
16	10	905			0	
17	10	3707			0	
18	10	3766			0	
19	10	3659			0	
20	10	4259			0	

- To add an End Date on the Deduction in Workforce, place zeroes in the override column
- Remember to remove the Header row
- Always save the file as .CSV

# Importing the Data

## Import Deduction Data

1 2 3

### Import Specifications

Import Type: Standard

Date: 12/20/2024

Import File: Choose File Deduction Import.csv

Description: End FSA Deduction

Reset Back Next

Because we want this Import to END the deduction, the date entered here will be the end date for the deduction on the employees in Workforce.

## Employee Deduction Report

Load Saved Report

Distribution Group

Override Report Title

Email Group

Effective Date

Sort By

Report Type

Employee

Select By

Primary Departments

**Deductions**

Employee Status

Available Deduction Code(s): 179

1 - Deduction 4  
101 - Deduction 6  
102 - Deduction 7  
10ROTH - Deduction 178  
11 - Deduction 8  
119 - Deduction 9  
119B - Deduction 10  
12 - Deduction 11  
129 - Deduction 12  
13 - Deduction 13  
13A - Deduction 14

Selected Deduction Code(s): 1

10 - FSA Medical

Active Only

Print

Reset

Save

Save As

Delete

*Run the  
Employee  
Deduction  
Report again to  
check results!*



nwerplab1.tylertech.com/nwerp/HumanResources/Reports/EmployeeReports/EmployeeDeductionExportReportList.aspx

Employee Number	Employee...	Department Code	Department Description	Calculation Method	Deduction	Effective Date	End Date
643	Helwig, La...	140	Fire Department	Flat Amount	10 - FSA Medical	01/01/1997	12/20/2024
669	Burtner, St...	011	Mayor's Office	Flat Amount	10 - FSA Medical	01/01/1997	12/20/2024
858	Towlerton,...	140	Fire Department	Flat Amount	10 - FSA Medical	01/01/1997	12/20/2024
877	Mellas, Ter...	132	Police - Dispatchers	Flat Amount	10 - FSA Medical	01/01/1997	12/20/2024
2297	Upthegro...	340	UT Landscape & Sewer	Flat Amount	10 - FSA Medical	11/14/2003	12/20/2024
2381	Storch, M...	132	Police - Dispatchers	Flat Amount	10 - FSA Medical	03/04/2005	12/20/2024
2384	Faith, Yadira	130	Police Officers	Flat Amount	10 - FSA Medical	07/08/2005	12/20/2024
2949	Goodlow, ...	132	Police - Dispatchers	Flat Amount	10 - FSA Medical	06/04/2010	12/20/2024
3298	Carmany, ...	305	UT Purification	Flat Amount	10 - FSA Medical	09/23/2011	12/20/2024
3143	Shindler, E...	131	Police - Corrections	Flat Amount	10 - FSA Medical	02/24/2012	12/20/2024
3398	Paparella, ...	132	Police - Dispatchers	Flat Amount	10 - FSA Medical	08/24/2012	12/20/2024
958	Picariello, ...	130	Police Officers	Flat Amount	10 - FSA Medical	06/16/2014	12/20/2024
3449	Uniacke, J...	332	UT River	Flat Amount	10 - FSA Medical	07/28/2014	12/20/2024
939	Conces, Bl...	140	Fire Department	Flat Amount	10 - FSA Medical	12/01/2014	12/20/2024
802	Vaile, Terr...	130	Police Officers	Flat Amount	10 - FSA Medical	10/19/2015	12/20/2024
911	Lorenc, Ch...	340	UT Landscape & Sewer	Flat Amount	10 - FSA Medical	11/16/2015	12/20/2024
2941	Braccacci...	041	Legal	Flat Amount	10 - FSA Medical	06/13/2016	12/20/2024

# Adjustment Import

## Can

- ❖ Adjust Hours Codes
- ❖ Include Multiple Dates
- ❖ Have Multiple Entries for One Employee

## Does Not

- ❖ Create a Journal Entry
- ❖ Affect an Employee's Actual Pay
- ❖ Affect an Employee's W2 wages

## Primary Use

Adjust Accrual Balances for a Large Number of Employees

# Testing Your Adjustments

When making a large number of adjustments with an import, you should always compare the “before” with the “after”.

Use the Accrual Balance Report for adjustments to accrual balances.

Use Hours Analysis for other types of hours adjustments.

# Accrual Balance Report

Human Resources > Reports > Management Reports > Accrual Balance Report

### Accrual Balance Report

Load Saved Report  Distribution Group

Override Report Title  Email Group

Report Type  Select by

As of Date  Employee

Include Zero Balance  Include Rate

Include Unposted Hours  Include Longevity

Page Break by Department  Include Special Assignment

Compensated Percent  Include Certification

**Hours Categories**  **Primary Departments**  **Benefit Groups**  **Statuses**

Available Hour Categories: 18

- CVAC - Carryover Annual Vacation
- DSCK - Donated Sick
- FIRE - Fireman Reduced
- HOLI - Holiday Pay
- Inct - Incentive Time - Other
- InctFit - Incentive Time Physical Fitness
- PERS - Personal
- SICK - Sick
- STRS - Stress Day
- USER - User
- VAC - Vacation
- XVAC - DO NOT USE - INVALID HOURS CATAG

Selected Hour Categories: 1

- AVAC - Annual Vacation Accrual

# Accrual Balance Report Before Performing the Adjustment Import

1 of 1 Find | Next

## Accrual Balance Report

As of 05/03/24  
Select by Primary Department and Status  
Detail by Primary Department

Employee	AVAC - Annual Vacation Accrual
<b>Primary Department 010 - Information Technology</b>	
3731 Bierbower, Blair S	.0000
2668 Buffa, Carmen	131.5000
4127 Guiga, Rosalinda	55.0000
2273 Hoder, Jarod A	26.0000
804 Levian, Blanca G	.0000
Primary Department 010 -	212.5000
<b>Information Technology Totals</b>	
<b>Primary Department 011 - Mayor's Office</b>	
4130 Bunche, Helen C	.0000
669 Burtner, Stefan G	40.0000
2183 Gonzale, Nadine	.0000
Primary Department 011 - Mayor's	40.0000
<b>Office Totals</b>	
<b>Primary Department 020 - Auditor's Office</b>	
3707 Bastura, Regan	59.1096
246 Eversmeyer, Kacey A	.0000
2765 Henrichsen, Brooke L	33.5000
2605 Nuara, Cullen	3.0000
2265 Walburn, Ramiro J	8.0000
3744 Yapp, Tess	.0000
Primary Department 020 -	103.6096
<b>Auditor's Office Totals</b>	
<b>Primary Department 030 - Treasurer's Office</b>	
3645 Meigel, Alexis B	48.0000
2081 Theriault, Cristina A	28.4760
1205 Tolin, Fidel M	.0000
Primary Department 030 -	76.4760
<b>Treasurer's Office Totals</b>	
Grand Totals	432.5856


# Completed .CSV File for Import

	A	B	C	D	E	F	G	H	I
1	3731	5/1/2024	EAVC	40					
2	2668	5/1/2024	EAVC	40					
3	4127	5/1/2024	EAVC	40					
4	2273	5/1/2024	EAVC	40					
5	804	5/1/2024	EAVC	40					
6	4130	5/1/2024	EAVC	40					
7	669	5/1/2024	EAVC	40					
8	2183	5/1/2024	EAVC	40					
9	3707	5/1/2024	EAVC	40					
10	246	5/1/2024	EAVC	40					
11	2765	5/1/2024	EAVC	40					
12	2605	5/1/2024	EAVC	40					
13	2265	5/1/2024	EAVC	40					
14	3744	5/1/2024	EAVC	40					
15	3645	5/1/2024	EAVC	40					
16	2081	5/1/2024	EAVC	40					
17	1205	5/1/2024	EAVC	40					

# Adjustment Import

## Human Resources > Payroll Administrator Tasks > Adjustment Processing

### Adjustment List

From Start Date  

Status  

**Search**

	Batch Number 	Check Date 	Employee Number 	Employee Name 	Posted 	Comments 
	<input type="text" value="▽   Equals..."/>	<input type="text" value="▽   On..."/>	<input type="text" value="▽   Equals..."/>	<input type="text" value="▽   Contains..."/>	<input type="text" value="▽  "/>	<input type="text" value="▽   Contains..."/>

0 - 0 of 0 records



  Prev **1** Next   Show  records

**New**      **Import**

# Adjustment Import

## Human Resources > Payroll Administrator Tasks > Adjustment Processing

### Adjustment List

From Start Date    
Status  

**Search**


Batch Number	Check Date	Employee Number	Employee Name	Posted	Comments
--------------	------------	-----------------	---------------	--------	----------

▽ Equals...    ▽ On...

0 - 0 of 0 records

**New**   Delete   Print   Copy

### Import Adjustment

Date  

Import File  Import for Vac...djustment.csv

Comments

**Import**   **Cancel**

< Prev   **1**   Next >   Show 50 records



# Adjustment Import

## Human Resources > Payroll Administrator Tasks > Adjustment Processing

Adjustment List

From Start Date: 05/03/2023  
Status: Unposted

Search

Batch Number	Check Date	Employee Number	Employee Name	Posted	Comments
103	05/01/2024				Annual Vacation Adjustment per Council

Employee Number	Employee Name
3707	Bastura, Regan
3731	Bierbower, Blair S
2668	Buffa, Carmen
4130	Bunche, Helen C
669	Burtner, Stefan G
246	Eversmeyer, Kacey A
2183	Gonzale, Nadine
4127	Guiga, Rosalinda
2765	Henrichsen, Brooke L
2273	Hoder, Jarod A
804	Levian, Blanca G
3645	Meigel, Alexis B
2605	Nuara, Cullen
2081	Therault, Cristina A
1205	Tolin, Fidel M
2265	Walburn, Ramiro J
3744	Yapp, Tess

1 - 1 of 1 records


Navigation: Prev 1 Next Show 50 records

Buttons: New Delete Print Copy Reverse **Post** Import

# Accrual Balance Report

## Before and After Comparison

1 of 1 Find | Next




### Accrual Balance Report

As of 05/03/24  
Select by Primary Department and Status  
Detail by Primary Department

Employee	AVAC - Annual Vacation Accrual
<b>Primary Department 010 - Information Technology</b>	
3731 Bierbower, Blair S	.0000
2668 Buffa, Carmen	131.5000
4127 Guiga, Rosalinda	55.0000
2273 Hoder, Jarod A	26.0000
804 Levian, Blanca G	.0000
Primary Department 010 -	212.5000
<b>Information Technology Totals</b>	
<b>Primary Department 011 - Mayor's Office</b>	
4130 Bunche, Helen C	.0000
669 Burtner, Stefan G	40.0000
2183 Gonzale, Nadine	.0000
Primary Department 011 - Mayor's	40.0000
<b>Office Totals</b>	
<b>Primary Department 020 - Auditor's Office</b>	
3707 Bastura, Regan	59.1096
246 Eversmeyer, Kacey A	.0000
2765 Heinrichsen, Brooke L	33.5000
2605 Nuara, Cullen	3.0000
2265 Walburn, Ramiro J	8.0000
3744 Yapp, Tess	.0000
Primary Department 020 -	103.6096
<b>Auditor's Office Totals</b>	
<b>Primary Department 030 - Treasurer's Office</b>	
3645 Meigel, Alexis B	48.0000
2081 Theriault, Cristina A	28.4760
1205 Tolin, Fidel M	.0000
Primary Department 030 -	76.4760
<b>Treasurer's Office Totals</b>	
Grand Totals	432.5856

1 of 1 Find | Next



### Accrual Balance Report

As of 05/03/24  
Select by Primary Department and Status  
Detail by Primary Department

Employee	AVAC - Annual Vacation Accrual
<b>Primary Department 010 - Information Technology</b>	
3731 Bierbower, Blair S	40.0000
2668 Buffa, Carmen	171.5000
4127 Guiga, Rosalinda	95.0000
2273 Hoder, Jarod A	66.0000
804 Levian, Blanca G	40.0000
Primary Department 010 -	412.5000
<b>Information Technology Totals</b>	
<b>Primary Department 011 - Mayor's Office</b>	
4130 Bunche, Helen C	40.0000
669 Burtner, Stefan G	80.0000
2183 Gonzale, Nadine	40.0000
Primary Department 011 - Mayor's	160.0000
<b>Office Totals</b>	
<b>Primary Department 020 - Auditor's Office</b>	
3707 Bastura, Regan	99.1096
246 Eversmeyer, Kacey A	40.0000
2765 Heinrichsen, Brooke L	73.5000
2605 Nuara, Cullen	43.0000
2265 Walburn, Ramiro J	48.0000
3744 Yapp, Tess	40.0000
Primary Department 020 -	343.6096
<b>Auditor's Office Totals</b>	
<b>Primary Department 030 - Treasurer's Office</b>	
3645 Meigel, Alexis B	88.0000
2081 Theriault, Cristina A	68.4760
1205 Tolin, Fidel M	40.0000
Primary Department 030 -	196.4760
<b>Treasurer's Office Totals</b>	
Grand Totals	1,112.5856



# Third Party Hours Import

- Your organization must license the Time & Attendance Interface
- Imports hours into an open payroll batch
- Can be used for any hours code
- Examples
  - Lump sum payments that can't be scheduled (safety incentives)
  - Bonuses
  - Imputed Income adjustments
  - Car allowances
  - Hours exported from non-integrated time keeping software

# Third Party Hours Import

Usually Accessed Through Payroll Manager

The screenshot displays the New World ERP interface. At the top, there is a navigation bar with the logo and the text "New World ERP" and a search bar. Below this, a breadcrumb trail shows "myFavorites | Financial Management | Human Resources". The main content area is titled "Payroll Manager ( 2202411 - B ) - Home" and contains a sidebar with several menu items: "Third Party Hours Import" (highlighted in yellow), "Departmental Hours List", "Import Departmental Hours", and "Centralized Hours Entry". The "Third Party Hours Import" menu item is expanded, showing a sub-menu with icons for various actions. The main content area is titled "Payroll Manager ( 2202411 - B ) - Import Third-Party Hours" and displays the following information: "Start Date 05/12/2024 End Date 05/25/2024 Check Date 05/31/2024". Below this, there are three numbered tabs: "1" (active), "2", and "3". The "Import Specifications" section contains the following fields: "Translation Account Group" (dropdown menu), "Import Source" (File Import dropdown), "Date" (05/03/2024 with a calendar icon), "Import Type" (Standard dropdown), "Import File Location/Name" (Choose File button and text input field containing "2202411 Bonus Pay.xlsx"), and "Description" (text input field containing "Bonus Pay for Safety"). At the bottom of the form, there are four buttons: "Reset", "View Import History", "Back", and "Next".

# Third Party Hours Import

- *Employee Number*
- *Hours Worked*
- *Hours Codes*
- *Work Date*
- *Other Pay Amount*
- Separate Check Code
- Override Pay Rate
- Shift Code
- Override G/L Organization
- Reason Code
- Project Code
- Override Grade Code
- Override Step Code
- Override Department
- Comments
- Override Job Title
- Override Position




I'm Never Going to  
Remember All This!

The screenshot displays the New World ERP interface. At the top, the header includes the logo, the text "New World ERP", and a search bar. Below the header, a navigation bar lists various modules: myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance. A teal banner at the top of the main content area contains the text "Import Deduction Data", which is highlighted with a red box. To the right of this banner are icons for a clipboard, a green checkmark, and a "Help" button featuring a question mark icon, also highlighted with a red box. Below the banner, the "Import Specifications" section is visible, with fields for "Import Type", "Date", "Import File", and "Description", and buttons for "Reset", "Back", and "Next". An inset browser window is open, showing the URL "nwerphelp.tylertech.com/nwerp\_help\_latestversion/Content/Human%20Resources/Pa...". The browser content shows the "new world a tyler erp solution" logo, a "Search Help Central" search bar, and a breadcrumb trail: "You are here: Applications & Maintenance > Human Resources > Payroll Administrator Tasks > Import Deduction Data". The main heading in the browser is "Import Deduction Data", followed by the sub-heading "Human Resources > Payroll Administrator Tasks > Import Deduction Data". The text below reads: "Use this three-page import wizard to import deduction amounts from a third-party system to Workforce Administration." and "The import process works for stand-alone deduction codes. To tell whether a".

Import Deduction Data x Import Deduction Data x +

nwerphelp.tylertech.com/nwerp\_help\_latestversion/Content/Human%20Resources/Payroll%20Administrator%20Tasks/Import%20Deduction...



Search Help Central

<i>Import Type</i>	<p>Required. Format of the file to be imported. Click in the field to select from a drop-down list of available types.</p> <p>Select <b>Standard</b> to use the standard comma delimited (.CSV) file format.</p>
<i>Date</i>	<p>Required. Date to be used as the start date when the deductions are added to the employees. Click in the field to select the date from a pop-up calendar, or type the date directly in the field.</p>
	<p>Required. Tells the path to the file you are importing. Click the <b>Browse</b> button to select the file, or type the path directly in the field.</p> <p>One line in the import deduction file equates to one employee deduction record. The file must be comma delimited (ends in .CSV), with a minimum of the deduction code and employee number filled in.</p> <p>The fields in the file are as follows:</p> <ul style="list-style-type: none"> <li>» <i>Deduction Code</i></li> <li>» <i>Employee Number</i></li> </ul>

https://nwerphelp.tylertech.com/nwerp\_help\_latestversion/Content/Home.htm



# Calculation Processes

Human Resources > Payroll Administrator Tasks



- Calculate Step Rate Increase



- Calculate Mass Rate Increase



- Process Retro Pay

# Calculation Processes

- A. Calculate Step Rate Increases – used to move employees up a Step
  - 1. Can be run by Anniversary or Effective Date
  - 2. Must be run **before** Calculate Mass Rate Increase
- B. Calculate Mass Rate Increase – used to increase Grade Rates and employee rates simultaneously
  - 1. Can be run by Grade Type
  - 2. Can increase by Amount or Percent
  - 3. Updates Grade and Employees as of an Effective Date
- C. Process Retro Pay – used to pay employees retroactively
  - 1. Update employee Job prior to calculation
  - 2. Can be run by Department or Employee
  - 3. Can limit hours codes that receive Retro
  - 4. Cannot be used for employees with a Salary Grade

“

*“My goal is no longer to get more done, but rather to have less to do.” – Francine Jay*

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## Your feedback is important

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to improve our presentations



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