



NW ERP

**What You Might Not Know
About HR Reports**



Jerri Ainsworth

Software Support Specialist

What You Might Not Know About HR Reports –

An overview of exciting new reports as
well as enhancements to amazing
oldies



REPORTS

Reports serve various purposes and provide valuable information.

Reports collect and present important information in an organized format.

Reports can help organizations make informed decisions.

Agenda

- ❖ Newer Reports
- ❖ Enhancements to Existing Reports
- ❖ Tips and Tricks

Newer Reports

Newer Reports

Employee Reports:

Employee Job Export Report - added 2023.1.2 – 2023 Design Challenge

Job information pulled into a grid that can be exported to Excel.

Management Reports:

Accrual Projection Report - added 2023.1.9

Generates accrual projection reports for selected employees.

Payroll Audit Report

Shows - Process Name, Log Time and Username

Newer Reports cont.

Security Reports:

Approval History Report

Review and export approval history information to Excel

Employee Job Export Report

HR > Reports > Employee Reports > Employee Job Export Report

- ❖ Run report by selecting an As of Date
- ❖ Select by benefit group, department or employee
- ❖ Identify benefit groups, departments and status
- ❖ Choose to Include Out of Position if desired

The screenshot displays the 'Employee Job Export Report' interface. At the top, there is a teal header with the title. Below the header, there are several filter sections. The first section includes 'Load Saved Report' (a dropdown menu), 'Override Report Title' (a text input field), 'Distribution Group' (a dropdown menu with a blue refresh icon), and 'Email Group' (a dropdown menu). The second section includes 'As of Date' (a date picker set to 04/03/2024), 'Select By' (a dropdown menu set to 'Benefit Group'), and 'Employee' (a dropdown menu). The third section includes 'Include Out of Position' (a checked checkbox). Below these filters, there are three tabs: 'Benefit Groups' (selected), 'Departments', and 'Status'. Under the 'Benefit Groups' tab, there are two lists. The 'Available' list contains 27 items: 10 - Firemen - 80 Hour, 11 - USW Local 6621, 12 - Mgt. Group, 12B - Mgt. Group w/Bonus Sick, 13 - Health Department Employees, 13NL - Health Dept No Long, and 14 - Dispatchers. The 'Selected' list contains 1 item: 1 - Regular Employees.

Employee Job Export Report

Information on the report includes employee number and name, department, benefit group, hire date, effective date, primary job, position, title, pay group, FLSA, grade, step, pay type, hourly rate, pay period, annual pay, FTE, G/L distribution, project and percent

Employee Number	Employee Name	Department	Benefit Group	Hire Date	Effective Date	Primary Job	Position	Title	Pay Group	FLSA	Grade	Step	Pay Type
4289	Versage, Gerardo	051 - Judicial - #1	1 - Regular Employees	03/06/2023	06/19/2023	✓	051-050-001 - Deputy B...		Regular Employee	90HR - FLSA 90 hour Thr...	J18 - Deputy Bailiff D/L L...	100%	Hourly
4263	Killick, Rosemary	061 - Clerk of Courts	1 - Regular Employees	10/31/2022	10/23/2023	✓	061-911-011 - Deputy Cl...		Regular Employee	90HR - FLSA 90 hour Thr...	CC07 - Clerk of Courts D...	10	Hourly

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

Print button generates a grid which can be exported by clicking any of the gear icons and clicking Export

Accrual Projection Report

HR > Reports > Management Reports > Accrual Projection Report

- ❖ Enter Employee
- ❖ Accrual plan populates with employee entry
- ❖ Choose accrual profile
- ❖ Choose Frequency

Accrual Projection Report

Load Saved Report	<input type="text"/>	Distribution Group	<input type="text"/>	
Override Report Title	<input type="text"/>	Email Group	<input type="text"/>	

Employee	<input type="text" value="3416 - Two, Thing"/>		
Accrual Plan	<input type="text" value="FT w/ LTD - Full Time Employee"/>		
Accrual Profile	<input type="text" value="Sick"/>		
Frequency	<input type="text" value="Bi-Weekly"/>		

Accrual Projection Report



Accrual Projection Report

Projection Date Range 1/1/2024 - 12/31/2024

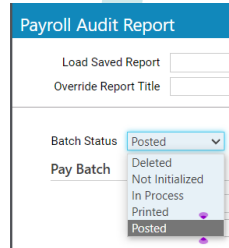
Employee:	3416 - Two, Thing Admin Name - Changed/Administrative Services - Change	Accrual Plan - Profile Code:	Full Time Employees w/ LTD - Sick
Department:	Non Union-FT	Accrual Based On Date:	January
Benefit Group:	Bi-Weekly	Roll Accrual Start - End Date:	1/1/2024 - 12/31/2024
Frequency:	SICK - Sick	Last Pay Batch In Payroll:	Batch Number: 202427 04/04/2024 - 04/04/2024
Accrual Hour Category:		Projection Start Date:	4/19/2024

Month Of Service Start Date	Month Of Service End Date	Months Of Service	Accrual Start Date	Accrual End Date	Accrual Projected
7/1/2021	5/2/2024	34	4/19/2024	5/2/2024	3.4200
7/1/2021	5/16/2024	34	5/3/2024	5/16/2024	3.4200
7/1/2021	5/30/2024	34	5/17/2024	5/30/2024	3.4200
7/1/2021	6/13/2024	35	5/31/2024	6/13/2024	3.4200
7/1/2021	6/27/2024	35	6/14/2024	6/27/2024	3.4200
7/1/2021	7/11/2024	36	6/28/2024	7/11/2024	3.4200
7/1/2021	7/25/2024	36	7/12/2024	7/25/2024	3.4200
7/1/2021	8/8/2024	37	7/26/2024	8/8/2024	3.4200
7/1/2021	8/22/2024	37	8/9/2024	8/22/2024	3.4200
7/1/2021	9/5/2024	38	8/23/2024	9/5/2024	3.4200
7/1/2021	9/19/2024	38	9/6/2024	9/19/2024	3.4200
7/1/2021	10/3/2024	39	9/20/2024	10/3/2024	3.4200
7/1/2021	10/17/2024	39	10/4/2024	10/17/2024	3.4200
7/1/2021	10/31/2024	39	10/18/2024	10/31/2024	3.4200
7/1/2021	11/14/2024	40	11/1/2024	11/14/2024	3.4200
7/1/2021	11/28/2024	40	11/15/2024	11/28/2024	3.4200
7/1/2021	12/12/2024	41	11/29/2024	12/12/2024	3.4200
7/1/2021	12/26/2024	41	12/13/2024	12/26/2024	3.4200
Total Projected:					61.5600
Accrual Earned:					0.0000
Accrual Used:					0.0000
Total Available:					61.5600

Payroll Audit Report

HR > Reports > Management Reports > Payroll Audit Report

- ❖ Select Batch Status
- ❖ Enter Pay Group
- ❖ Choose pay batch
- ❖ Submit



Payroll Audit Report

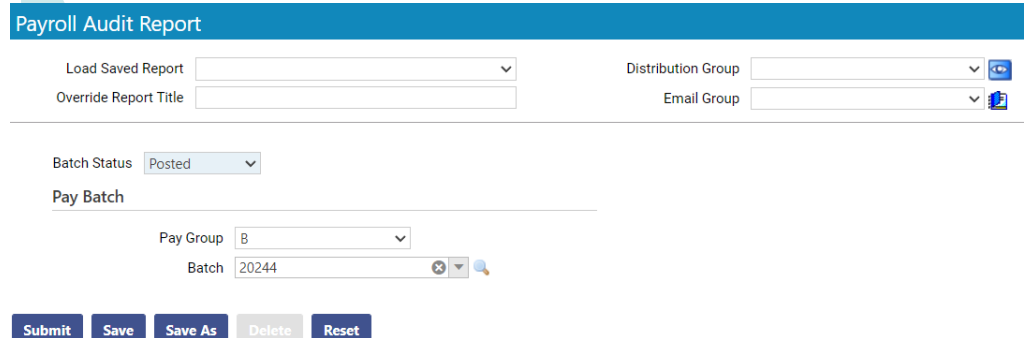
Load Saved Report

Override Report Title

Batch Status

Pay Batch

- Deleted
- Not Initialized
- In Process
- Printed
- Posted



Payroll Audit Report

Load Saved Report

Override Report Title

Distribution Group

Email Group

Batch Status

Pay Batch

Pay Group

Batch

Payroll Audit Report cont.



Payroll Audit Report

Process Name	Log Time	User Name
Batch Number: 20244		
Add the payroll batch	02/16/24 10:22:52 AM	nws
Initialize the payroll batch	02/16/24 10:23:33 AM	nws
Initialize the payroll batch	02/16/24 10:23:52 AM	nws
Initialize the payroll batch	02/16/24 10:26:50 AM	nws
Initialize the payroll batch	02/16/24 10:40:25 AM	nws
Create a payment register for the payroll batch	02/16/24 10:43:56 AM	nws
Post the payroll batch	02/16/24 10:47:06 AM	nws

Run by nws on 04/05/2024 11:45:43 AM

Page 1 of 1

Payroll Audit Report cont.

- ❖ Batch Status Deleted will remove Pay Batch fields

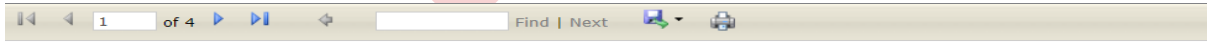
- ❖ Submit

Payroll Audit Report

Load Saved Report	<input type="text"/>	Distribution Group	<input type="text"/>
Override Report Title	<input type="text"/>	Email Group	<input type="text"/>

Batch Status

Payroll Audit Report cont.



Payroll Audit Report

<u>Process Name</u>	<u>Log Time</u>	<u>User Name</u>
Batch Number: 785		
Create and initialize a manual check batch	10/18/23 3:23:33 PM	nws
Validate the Manual Check	03/25/24 7:50:37 PM	nws
Delete the manual check	03/26/24 8:21:05 AM	nws
Batch Number: 833		
Create and initialize the manual check	03/22/24 5:55:22 PM	nws
Validate the Manual Check	03/22/24 5:57:13 PM	nws
Validate the Manual Check	03/22/24 5:58:11 PM	nws
Validate the Manual Check	03/22/24 6:03:11 PM	nws
Validate the Manual Check	03/22/24 6:04:06 PM	nws
Validate the Manual Check	03/22/24 6:04:51 PM	nws
Validate the Manual Check	03/22/24 6:08:11 PM	nws
Validate the Manual Check	03/22/24 6:08:51 PM	nws
Validate the Manual Check	03/22/24 6:09:26 PM	nws
Validate the Manual Check	03/22/24 6:09:57 PM	nws
Delete the manual check	03/22/24 6:11:04 PM	nws
Batch Number: 800		
Create and initialize the manual check	01/05/24 2:37:34 PM	Sandy Distefano
Delete the manual check	03/22/24 5:56:57 PM	nws

Payroll Audit Report cont.



Payroll Audit Report

Process Name	Log Time	User Name
Batch Number: <u>220241</u>		
Add the batch	04/05/24 12:28:04 PM	nws
Initialize the batch	04/05/24 12:28:56 PM	nws
Uninitialize the batch	04/05/24 12:29:39 PM	nws
Delete the batch	04/05/24 12:39:01 PM	nws
Batch Number: <u>220241</u>		
Add the batch	04/05/24 12:25:30 PM	nws
Delete the batch	04/05/24 12:25:56 PM	nws
Batch Number: 785		
Create and initialize a manual check batch	10/18/23 3:23:33 PM	nws
Validate the Manual Check	03/25/24 7:50:37 PM	nws
Delete the manual check	03/26/24 8:21:05 AM	nws

Approval History Report

Maintenance > new world ERP Suite > Security > Reports > Approval History Report

- ❖ Select Date From and Date to – or leave one or both fields blank
- ❖ Select a user from Approver User dropdown – or leave blank for all users
- ❖ Select an approval process from Source Identifier – or leave blank to run all approval processes

Approval History Report

Load Saved Report Distri

Override Report Title

Date From

Date To

Approver User

Source Identifier

- Accounts Payable Change Invoice
- Accounts Payable Invoice Entry
- Accounts Payable Invoice Payment
- Asset Management Journal Batch
- Bank Reconciliation Journal Batch
- Citation Billing
- District Adjustment
- Employee Self Service**
- General Ledger Journal Batch
- Inventory Control Billing Batch
- Inventory Control Journal Batch
- Job Posting
- Job Posting Position
- Journal Batch Processing
- Miscellaneous Billing Adjustments
- Miscellaneous Billing Bad Debt
- Miscellaneous Billing Invoice Billing
- Miscellaneous Billing Late or Finance Fee Batch
- Miscellaneous Billing Late Processing

Approval History Report cont.

Exportable grid – like all other grids, click any gear icon > export > export

Process ...	Transacti...	Source Ident...	Transacti...	Last Approv...	Original A...	Approval ...	Approval Le...	Approval Re...	User Name	Comments	Minutes Sin...	Minutes Since F...	Process Id	Approved Id	User Id
Employee Self ...	Employee Self ...	Buttski, Abbie D	03/21/2024 12:...	03/21/2024 12:...	1	2	Approved	nws		0	0	45	218226	3	
Employee Self ...	Employee Self ...	Buttski, Abbie D	03/21/2024 12:...	03/21/2024 12:...	1	2	Approved	nws		0	0	45	218227	3	
Employee Self ...	Employee Self ...	Cassino, Anne	03/21/2024 12:...	03/21/2024 12:...	1	2	Approved	nws		0	0	45	218228	3	
Employee Self ...	Employee Self ...	Killpack, Wade J	03/21/2024 12:...	03/21/2024 12:...	1	2	Approved	nws		0	0	45	218225	3	

Process Name	Source Identifier	Transaction Reference	Description	Last Approval Date	Original Approval Date	Approval	Approval	Approval Response	User Name	Minutes	Minutes Since	Process Id	Approved Id	User Id
Employee Self S	Employee Self Ser	Buttski, Abbie D		03/21/2024 12:44:39 PM	03/21/2024 12:44:39 PM	1	2	Approved	nws	0	0	45	218226	3
Employee Self S	Employee Self Ser	Buttski, Abbie D		03/21/2024 12:46:13 PM	03/21/2024 12:46:13 PM	1	2	Approved	nws	0	0	45	218227	3
Employee Self S	Employee Self Ser	Cassino, Anne		03/21/2024 12:50:54 PM	03/21/2024 12:50:54 PM	1	2	Approved	nws	0	0	45	218228	3
Employee Self S	Employee Self Ser	Killpack, Wade J		03/21/2024 12:43:22 PM	03/21/2024 12:43:22 PM	1	2	Approved	nws	0	0	45	218225	3

Enhancements to Reports

Enhancements to Reports – 2023.1

Employee Reports – 20 Enhancements to 7 different reports and 3 Tyler Community Ideas put in place

Management Reports – Accrual Balance Report and Accrual History Report

Pay Day/Pay Day History Reports – 2 Enhancements to Pay Day Register and 1 to Shift Time and Attendance Report

EMPLOYEE REPORTS - ENHANCEMENTS

Employee Audit Report

HR > Reports > Employee Reports > Employee Audit Report

Section: Payroll Data- Schedule added

Employee Audit Report

Load Saved Report Distribution Group

Override Report Title Email Group

From Date To Date Select By

Sort By Employee

Employee 3415 - One, Thing T1

Departments **Sections** Users

Job - Position
Job - Roster Card
Payroll Data - Benefit Plans
Payroll Data - Benefit Plans Beneficiary
Payroll Data - Benefit Plans Dependent
Payroll Data - Benefits
Payroll Data - Certifications
Payroll Data - Deductions
Payroll Data - Direct Deposit
Payroll Data - Taxes
Personal - Address
Personal - Contacts/Dependents
Personal - Demographics
Personal - Email
Personal - Name
Personal - Phone

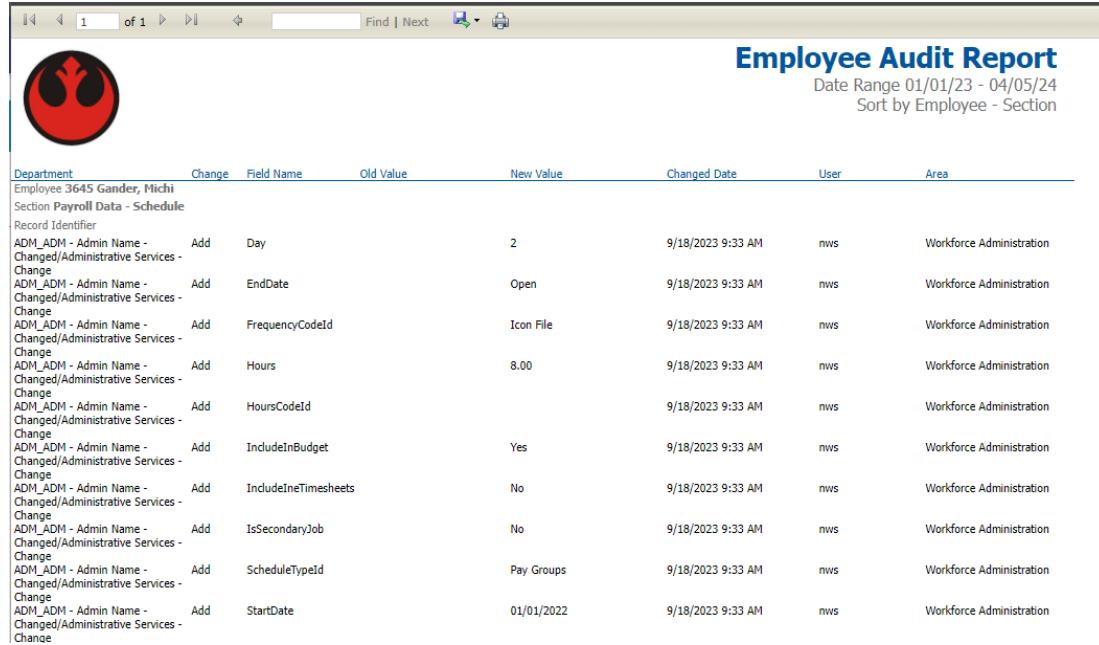
Available Section(s): 22

Payroll Data - Schedule

Selected Section(s): 1

EMPLOYEE REPORTS - ENHANCEMENTS

Employee Audit Report Cont.



The screenshot shows a web application interface for an Employee Audit Report. At the top left is a red and black circular logo. The title 'Employee Audit Report' is in blue, with the date range '01/01/23 - 04/05/24' and sort order 'Sort by Employee - Section' below it. A table lists audit changes with columns for Department, Change, Field Name, Old Value, New Value, Changed Date, User, and Area. The table contains 11 rows of data, all from the 'Workforce Administration' area, showing various field updates by user 'nws' on 9/18/2023.

Department	Change	Field Name	Old Value	New Value	Changed Date	User	Area
Employee 3645 Gander, Michi Section Payroll Data - Schedule							
Record Identifier							
ADM_ADMIN - Admin Name - Changed/Administrative Services - Change	Add	Day		2	9/18/2023 9:33 AM	nws	Workforce Administration
ADM_ADMIN - Admin Name - Changed/Administrative Services - Change	Add	EndDate		Open	9/18/2023 9:33 AM	nws	Workforce Administration
ADM_ADMIN - Admin Name - Changed/Administrative Services - Change	Add	FrequencyCodeId		Icon File	9/18/2023 9:33 AM	nws	Workforce Administration
ADM_ADMIN - Admin Name - Changed/Administrative Services - Change	Add	Hours		8.00	9/18/2023 9:33 AM	nws	Workforce Administration
ADM_ADMIN - Admin Name - Changed/Administrative Services - Change	Add	HoursCodeId			9/18/2023 9:33 AM	nws	Workforce Administration
ADM_ADMIN - Admin Name - Changed/Administrative Services - Change	Add	IncludeInBudget		Yes	9/18/2023 9:33 AM	nws	Workforce Administration
ADM_ADMIN - Admin Name - Changed/Administrative Services - Change	Add	IncludeInTimesheets		No	9/18/2023 9:33 AM	nws	Workforce Administration
ADM_ADMIN - Admin Name - Changed/Administrative Services - Change	Add	IsSecondaryJob		No	9/18/2023 9:33 AM	nws	Workforce Administration
ADM_ADMIN - Admin Name - Changed/Administrative Services - Change	Add	ScheduleTypeId		Pay Groups	9/18/2023 9:33 AM	nws	Workforce Administration
ADM_ADMIN - Admin Name - Changed/Administrative Services - Change	Add	StartDate		01/01/2022	9/18/2023 9:33 AM	nws	Workforce Administration

EMPLOYEE REPORTS - ENHANCEMENTS

Employee Information Export Report

HR > Reports > Employee Reports > Employee Information Export Report

- ❖ Annual grades display as annual amounts, not hourly rates

Pay Type	Hourly Rate	Pay Period	Annual
▽ Contains...	▽ Equals...	▽ Equals...	▽ Equals...
Hourly	\$10.0800	\$705.60	\$18,345.60

- ❖ Seniority Rank column added

Benefit Date	Accrual Date	Seniority Date	Seniority Rank
▽ On...	▽ On...	▽ On...	▽ Contains...
10/03/2012	10/03/2012	10/03/2012	0




- ❖ Union Code from employee's primary job added

EEOC Function	Worker's Comp	Union Code
▽ Contains...	▽ Contains...	▽ Contains...
03 - Public Welfare	7520 - Waterworks	1234 - Union 1234




EMPLOYEE REPORTS - ENHANCEMENTS

Employee Information Export Report cont.

- ❖ Secondary Phone 1 and Secondary Phone 2 columns added (Tyler Community Idea)

Primary Phone 	Secondary Phone 1 	Secondary Phone 2 
▽ Contains...	▽ Contains...	▽ Contains...
2605555555	2605557777	2607775555

- ❖ Secondary Email 1 and Secondary Email 2 columns added (Tyler Community Idea)

Primary Email 	Secondary Email 1 	Secondary Email 2 
▽ Contains...	▽ Contains...	▽ Contains...
hoosier.hoops@bbstadi...	hhoops@att.com	

- ❖ Inactive benefit groups are included

EMPLOYEE REPORTS - ENHANCEMENTS

Employee Job Export Report

- ❖ Ability to exclude out of position employee jobs added

Employee Job Export Report

Load Saved Report

Override Report Title

As of Date

Select By

Employee

Include Out of Position

- ❖ Annual grades display as annual amounts, not hourly rates
- ❖ Position Entry Date column added

Employee N...	Employee N...	Primary Job	Position	Grade	Pay Type	Hourly R...	Pay Peri...	Annual	Position Entry Date
6565	Hoops, Indiana		7502-124-01 - Cus...	615 - Recreation Assist...	Hourly	\$8.0400	\$643.20	\$16,723.20	07/01/2023
6565	Hoops, Indiana	✓	5602-254-01 - Far...	620 - Assistant	Hourly	\$10.0800	\$705.60	\$18,345.60	07/01/2023

EMPLOYEE REPORTS - ENHANCEMENTS

Employee Pay Rate Report

HR > Reports > Employee Reports > Employee Pay Rate Report

❖ Checkbox added to pull Primary Job only pay rate

Employee Pay Rate Report

Load Saved Report Distribution Group

Override Report Title Email Group

Effective Date

Proposed Increase

Number of Decimal Places

Proposed Rate on Base Only

Primary Job Only

Select By

Sort By

Employee

Include Longevity

Include Special Assignment

Include Certification

Departments | Benefit Groups | Pay Types

Available Items: 0

Selected Items: 3

- Salary
- Hourly
- Annual

EMPLOYEE REPORTS - ENHANCEMENTS

Employee Pay Rate Report cont.



Employee Pay Rate Report

Effective 04/09/24

Pay Types - Hourly, Salary, Annual

Proposed Increase 3.00%

Employee	Primary	Pay Rate	Base Rate	Annual	Proposed Rate	Proposed Annual
Department O&M_PRK - O/M/Park Maintenance						
6565 Hoops, Indiana	Yes	620 - 3	10.08	18,345.60	10.38	18,891.60
Department O&M_PRK - O/M/Park Maintenance			Employees 1	\$18,345.60		\$18,891.60
Grand Totals Departments	1		Employees 1	\$18,345.60		\$18,891.60

Run by nws on 04/09/2024 20:20:58 PM

Page 1 of 1

EMPLOYEE REPORTS - ENHANCEMENTS

Employee Setup Error Report

HR > Reports > Employee Reports > Employee Setup Error Report

- ❖ Ability to run report for an individually selected employee added
- ❖ Ability to run report without an As of Date for one employee added

Employee Setup Error Report

Load Saved Report Distri

Override Report Title

As of Date

Report Type

Employee

Status

AC - Active

EMPLOYEE REPORTS - ENHANCEMENTS

Employee Setup Error Report cont.

- ❖ An error check to find job events with **missing grades** added
- ❖ An error check to find job events with **missing position** entry dates added



The screenshot displays the 'Employee Setup Error Report' interface. At the top left is a logo consisting of several colored dots. The title 'Employee Setup Error Report' is in blue. Below the title is a table with columns: Employee, Status, Area, and Issue. The table contains one row for employee 711 Mullaly, Greyson K, who is Inactive. The Area is 'Workforce - Job' and the Issue is 'Employee is assigned to an empty position entry date as of 04/10/2009. Employee is assigned to an empty position entry date as of 05/12/2009. Employee is assigned to an empty grade as of 04/10/2009. Employee is assigned to an empty grade as of 05/12/2008.' Below the table is a navigation bar with tabs: Personal, Employment, Jobs, Payroll Data, Contracts, and Employer Reporting. The 'Jobs' tab is selected. Below the navigation bar is a table with columns: Primary, Date Range, Job Title, Department, Entry Date, Grade, and Rate. The table contains one row for a job event with a date range of 04/10/2009 - 05/11/2009 and a job title of Conversion. At the bottom right of the screenshot is a 'Job Detail' link and a page indicator '< 2 of 3 >'. The overall interface has a light green and white color scheme.

Employee	Status	Area	Issue
Department 711 Mullaly, Greyson K	Inactive	Workforce - Job Workforce - Job Workforce - Job Workforce - Job	Employee is assigned to an empty position entry date as of 04/10/2009. Employee is assigned to an empty position entry date as of 05/12/2009. Employee is assigned to an empty grade as of 04/10/2009. Employee is assigned to an empty grade as of 05/12/2008.

Primary	Date Range	Job Title	Department	Entry Date	Grade	Rate
 	04/10/2009 - 05/11/2009	Conversion	REC_PRG_ATH - Rec/Recreation Programming/Athletics		-	

EMPLOYEE REPORTS - ENHANCEMENTS

Employee Setup Error Report cont.

- ❖ Ability to report errors related specifically to Maintenance or Workforce Administration added
- ❖ A check to identify GL distributions that do not add up to 100% was added to position maintenance master table

Employee Setup Error Report

Load Saved Report Distribution Group
Override Report Title Email Group

As of Date Check System Settings
Report Type Check Maintenance
Employee Check Employee

Status

AC - Active
Election - Election workers
Furlough - Furlough for Covid-19
IA - Inactive
LOA - Leave of Absence
Retire Track - Retirement Tracking
Temporary - Temporary
XACP - X PT-Active
XC - X Council
XEL - X Election Judge
XEO - X Election-Office Worker
XFARM - X Farm Caretaker
XFIRE - X Fire

Available: 16 Selected: 0

EMPLOYEE REPORTS - ENHANCEMENTS

Employee Setup Error Report cont.

- ❖ Maintenance component enhanced to identify grades with missing detail



Employee Setup Error Report

Employee	Status	Area	Issue
Department			
		Maintenance - Accrual Plans	Accrual Plan CSEA-7 - CSEA-7 Sick. is invalid .
		Maintenance - Benefits Administration	Benefit Plan MFHC is invalid As of 06/01/2022.
		Maintenance - Deduction Codes	Deduction Step Min and Max amount overlap for Deduction Code ARS - ARS.
		Maintenance - Grades	Grade Code: GradeHasNoDetail has no details.
		Maintenance - Hours	Effective start date is greater than effective end date for Hours Code CB

MANAGEMENT REPORTS - ENHANCEMENTS

Accrual Balance Report

HR > Reports > Management Reports > Accrual Balance Report

❖ An export option was added

Accrual Balance Report

Load Saved Report Distribution Group

Override Report Title Email Group

Report Type **Export** Select by Primary Department and Status

As of Date 10/20/2023

Include Zero Balance

Include Unposted Hours

Page Break by Department

Compensated Percent

Employee

Include Rate

Include Longevity

Include Special Assignment

Include Certification

Hours Categories Primary Departments Benefit Groups **Statuses**

MANAGEMENT REPORTS - ENHANCEMENTS

Accrual History Report

HR > Reports > Management Reports > Accrual History Report

❖ Functionality added to generate as export

Accrual History Report

Load Saved Report	<input type="text"/>	Distribution Group	<input type="text"/>
Override Report Title	<input type="text"/>	Email Group	<input type="text"/>

Report Type	<input type="text" value="Report Only"/>	Select By	<input type="text" value="Primary Department"/>
From Date	<input type="text" value="Report Only"/>	Employee	<input type="text"/>
To Date	<input type="text" value="10/31/2023"/>	Hour Category	<input type="text" value="COMP - Comp Time"/>

Include Other Pay Accrual Amounts

Primary Departments	Statues <input type="text"/>
---------------------	------------------------------

Available Statues: 13

Selected Statues: 1

POSITION CONTROL - ENHANCEMENTS

Employee Position Report

HR > Reports > Position Control > Employee Position Report

- ❖ Process Manager department rights have been applied
- ❖ Maintenance > new world ERP Suite > Process Manager

The screenshot displays the NWERP 2021.1 interface. At the top, there is a search bar and navigation links for myFavorites, Financial Management, Human Resources, Utility Management, Community Development, and Maintenance. The main area is titled "Process Manager" and includes a "Manager" section with various icons. On the left, there is a table with columns for "Effective Date" (04/09/2024) and "Username". The table lists users: nws, defaultnws, nws2, and nws3. A "Process Approvals" window is open, showing a dropdown for "Process" set to "Payroll - Department/Employee Inquiry" and "Approval Level" set to "Inquiry (Level - 0)". Below this, there are sections for "Available Departments: 0" and "Selected Departments: 125". The "Selected Departments" list includes: 1224-Test Dept Component name update, 12345-TEST DEPARTMENT, ADM_ADM-Admin Name - Changed,Administrative Services, ADM_BLD-Admin Name - Changed,Central Building, ADM_COM-Admin Name - Changed,Communications, ADM_COR-Admin Name - Changed,Community Outreach, ADM_COR_CEG-Admin Name - Changed,Community Outrea, ADM_COR_COM-Admin Name - Changed,Community Outrea, ADM_ELC-Admin Name - Changed,Elections, ADM_HRM-Admin Name - Changed,Human Resources, ADM_ITS-Admin Name - Changed,Information Technology, and ADM_IOS-Admin Name - Channed,Loss Control. At the bottom of the window are "Save", "Reset", and "Close" buttons.

POSITION CONTROL - ENHANCEMENTS

Employee Position Report cont.

Employee Position Report

As of 04/09/24
Sort by Position



Position	Employee	Department	Primary Job	FTE	Employee Status
0000-000-01 Teacher - 180 days - Jerri Test					
	3645 Gander, Michi	ADM_ADM - Admin Name - Changed/Administrative Services - Change	Yes	1.00	Active
	3415 One, Thing T1	ADM_ADM - Admin Name - Changed/Administrative Services - Change	Yes	1.00	Active
	3417 Three, Thing	ADM_ADM - Admin Name - Changed/Administrative Services - Change	Yes	1.00	Active
	3416 Two, Thing	ADM_ADM - Admin Name - Changed/Administrative Services - Change	Yes	1.00	Active
0000-000-02 Teacher - 180 days - Jerri Test					
	Unassigned	ADM_ADM - Admin Name - Changed/Administrative Services - Change	No		

PAY DAY REPORTS - ENHANCEMENTS

Pay Day Register

HR > Reports > Pay Day Reports > Pay Day Register

❖ Employer tax section added



Department ADM*ADM - Admin/Administrative Services
 Employee 207 - Depinho, Jadon L
 Position 0405-216-01 - Program Assistant III

Hours Description	Hours	Gross	Withholdings and Deductions	Gross Base	Benefits	Gross Base
10 REG FT - Regular-FT	80.0000	2,440.80	Gross	2,590.80	Group Life - Basic	0.58
LTD - LTD Taxable	.0000	8.07	Imputed Income	.00	JS Flat Amt	25.00
WV - Insurance Waiver	.0000	150.00	Federal Tax	190.85	Pera-Coordinated	183.06
Total	80.0000	\$2,590.80	Social Security	160.26	Total	\$208.64
			Medicare	37.48		
			State Tax	0.00	Employer Taxes	Gross Base
			Deferred Comp - MN State Plan	90.00	Medicare	37.48
			Dental - Base	14.00	Social Security	160.26
			Pera - Coordinated	158.65	Total	\$197.74
			Net	\$1,939.56		
					Workers' Comp	Gross Base
					Clerical	25.91
						2,590.80
					Direct Deposits	Amount
					TCF Bank MN	1,163.74
					USA Bank	775.82
					Total	\$1,939.56

Pay Day Register

Pay Date Range 03/26/23 - 04/08/23
 Pay Batch 220238

PAY DAY REPORTS - ENHANCEMENTS

Pay Day Register cont.

- ❖ Ability for separate check payments to be pulled into a separate Pay Day Register added

Pay Day Register

Load Saved Report Distribut

Override Report Title En

Pay Group

Batch

Select By

Employee

Separate Checks

Include Zero Checks

Departments

Available Department(s): 125

Selected Department(s): 0

1224 - Test Dept Component name update

12345 - TEST DEPARTMENT

ADM ADM Admin Name Changed Administrative Ser...

PAY DAY REPORTS - ENHANCEMENTS

Pay Day Register cont.

Employee 3417 - Three, Thing
Position 0000-000-01 - Teacher - 180 days - Jerri Test

Hours Description	Hours	Gross	Withholdings and Deductions	Gross Base	Benefits	Gross Base
10 REG FT - Regular-FT	80.0000	1,717.56	Gross	1,717.56	IN TRF - Employee After	51.53
Total	80.0000	\$1,717.56	Imputed Income	.00	TRF Retirement	103.05
			Federal Tax Test	0.00	Total	\$154.58
			Iowa State Tax Test	55.00		
			Local 1	17.18	Employer Taxes	Gross Base
			Addl Child Support-50 Percent	598.00	Total	
			GARNISHMENT25%	404.39		
			MED 1	100.00	Workers' Comp	Gross Base
			Net	\$542.99		

Direct Deposits	Amount
AlaskaUSA Federal Credit Union	108.60
Anchor Bank	325.79
Digital Federal CU	108.60
Total	\$542.99

Check \$0.00

Employee 3417 - Three, Thing
Position 0000-000-01 - Teacher - 180 days - Jerri Test

Hours Description	Hours	Gross	Withholdings and Deductions	Gross Base	Benefits	Gross Base
XTRA EARNINGS - Extra Earnings	.0000	100.00	Gross	100.00	IN TRF - Employee After	3.00
Total		\$100.00	Imputed Income	.00	TRF Retirement	6.00
			Federal Tax Test	0.00	Total	\$9.00
			Net	\$100.00		

Separate Check Extra Earnings Test \$0.00

Check \$100.00

Employer Taxes Gross Base

Direct Deposits Amount

PAY DAY REPORTS - ENHANCEMENTS

Shift Time and Attendance Report

HR > Reports > Pay Day Reports > Shift Time and Attendance Report

- ❖ Ability to run a selected range of work dates added

Shift Time and Attendance Report

Load Saved Report Distribution Group

Override Report Title Email Group

Pay Group Shift 2

Batch Shift 3

From Work Date Report Type

To Work Date

Departments **Regular Hours Codes** **Overtime Hours Codes** **Absence Codes** **Comp Time Codes**

Available Department(s): 124 Selected Department(s): 1

PAY DAY REPORTS - ENHANCEMENTS

Shift Time and Attendance Report cont.



Shift Time and Attendance Report

Work Date Range 01/14/24 - 01/31/24
Sort By Department - Employee - Pay Batch - Week - Position



Work Date	Day	Regular	Regular Shift 2	Regular Shift 3	Overtime	Overtime 2	Overtime 3	ABS Hours	Comp Hours	Other Pay	Comments
Department O&M_PRK - O/M/Park Maintenance											
Employee 6565 Hoops, Indiana											
Pay Batch 808											
Position 5602-254-01 - Farm Caretaker											
01/14/2024	Sunday	.0000	.0000	.0000	4.0000	.0000	.0000	0.0000	.0000		.00
Week 2 Totals		0.0000	0.0000	0.0000	4.0000	0.0000	0.0000	0.0000	0.0000		\$0.00
Pay Batch 808 Totals		0.0000	0.0000	0.0000	4.0000	0.0000	0.0000	0.0000	0.0000		\$0.00
Pay Batch 809											
Position 5602-254-01 - Farm Caretaker											
01/15/2024	Monday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/15/2024	Monday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/16/2024	Tuesday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/16/2024	Tuesday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/17/2024	Wednesday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/17/2024	Wednesday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/18/2024	Thursday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/18/2024	Thursday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/19/2024	Friday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/19/2024	Friday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
Week 1 Totals		80.0000	80.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000		\$0.00
Position 5602-254-01 - Farm Caretaker											
01/22/2024	Monday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/22/2024	Monday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/23/2024	Tuesday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/23/2024	Tuesday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/24/2024	Wednesday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/24/2024	Wednesday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/25/2024	Thursday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/25/2024	Thursday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/26/2024	Friday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/26/2024	Friday	8.0000	8.0000	.0000	.0000	.0000	.0000	0.0000	.0000		.00
01/26/2024	Friday	.0000	.0000	.0000	4.0000	.0000	.0000	0.0000	.0000		.00
01/26/2024	Friday	.0000	.0000	.0000	4.0000	.0000	.0000	0.0000	.0000		.00
Week 2 Totals		80.0000	80.0000	0.0000	8.0000	0.0000	0.0000	0.0000	0.0000		\$0.00
Pay Batch 809 Totals		160.0000	160.0000	0.0000	8.0000	0.0000	0.0000	0.0000	0.0000		\$0.00

Tips and Tricks

TIPS AND TRICKS

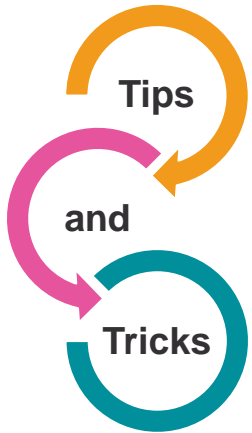
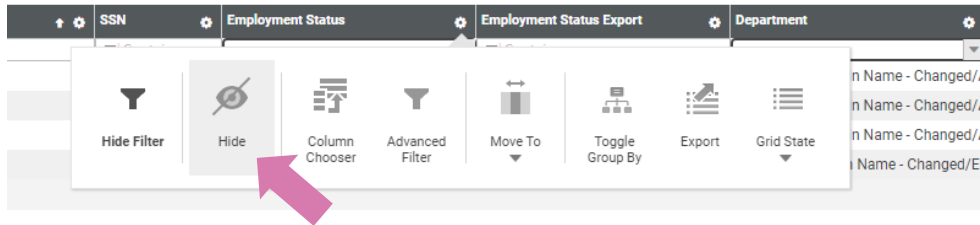
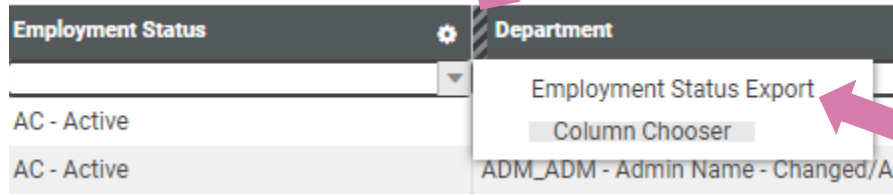
Have you ever exported the Employee Search and found numbers in the fields instead of names? For example: Employment Status – Department or Benefit Group

HR > Workforce Administration > Employee Search

	A	B	C	D	E	F	G	H
1	Employee	Employee Name	SSN	Employment Status	Department	Title	Benefit Group	Status
2	3415	One, Thing T1	211-11-11	323	16	0000-000-01 - Teacher - 180 da		3
3	3417	Three, Thing	333-33-33	323	16	0000-000-01 - Teacher - 180 da		3
4	3416	Two, Thing	222-22-22	323	16	0000-000-01 - Teacher - 180 da		3

Employee Search grid – Hidden columns

Employee Num...	Employee Name	SSN	Employment Status	Department	Title	Benefit Group	Status
▽ Equals...	▽ Thing	▽ Contains...			▽ Contains...		
3415	One, Thing T1	211-11-1111	AC - Active	ADM_ADM - Admin Name - Changed/Admi	0000-000-01 - Teacher - 180 days - Jerri Test	FT - Non Union-FT	
3417	Three, Thing	333-33-3334	AC - Active	ADM_ADM - Admin Name - Changed/Admi	0000-000-01 - Teacher - 180 days - Jerri Test	FT - Non Union-FT	

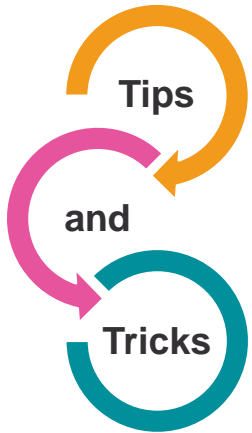


- ❖ Click Barber Shop Pole to open
- ❖ Click Employment Status Export to add in column
- ❖ Click gear on Employment Status and Hide
- ❖ Do same steps above for Department and Benefit Group

Employee Search grid – Hidden columns cont.

❖ Click gear icon in any column > Export > Export

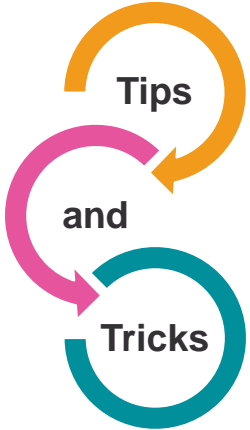
Employee Number	Employee Name	SSN	Employment Status	Department	Export	Title	Benefit Group	Expc	Status
3415	One, Thing T1	211-11-1111	AC - Active	ADM_ADM - Admin	0000-000-01 - Teacher - 180 d	FT - Non Union-FT			
3417	Three, Thing	333-33-3334	AC - Active	ADM_ADM - Admin	0000-000-01 - Teacher - 180 d	FT - Non Union-FT			
3416	Two, Thing	222-22-2223	AC - Active	ADM_ADM - Admin	0000-000-01 - Teacher - 180 d	FT - Non Union-FT			



- ❖ To save the grid – click any gear
- ❖ Click Grid State
- ❖ Save Settings

Employee Search

- ❖ A valuable tool in finding the number of employees in various category options
- ❖ Exportable listing with numerous options



Employee Search

Employee Name

Search

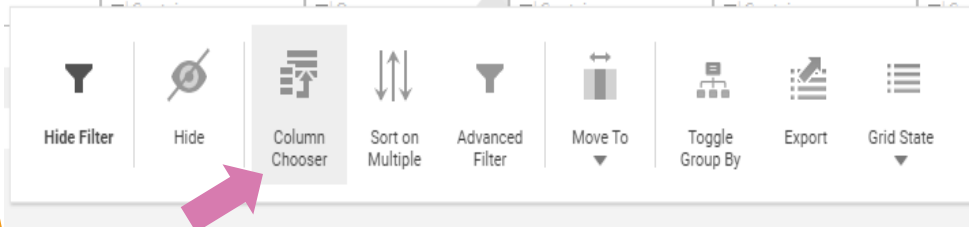
Employee Number	Employee Name	Employment Status	Department	Title	Benefit Group	Status
3645	Gander, Michi	AC - Active	ADM_ADM - Admin Name - Changed/Administ	0000-000-01 - Teacher - 180 days - Jerri Test	FT - Non Union-FT	
3415	One, Thing T1	AC - Active	ADM_ADM - Admin Name - Changed/Administ	0000-000-01 - Teacher - 180 days - Jerri Test	FT - Non Union-FT	
3417	Three, Thing	AC - Active	ADM_ADM - Admin Name - Changed/Administ	0000-000-01 - Teacher - 180 days - Jerri Test	FT - Non Union-FT	
3416	Two, Thing	AC - Active	ADM_ADM - Admin Name - Changed/Administ	0000-000-01 - Teacher - 180 days - Jerri Test	FT - Non Union-FT	

4 matching records

Page 1 of 1 | Show 60 records

Employee Information Export Report grid– Column Chooser

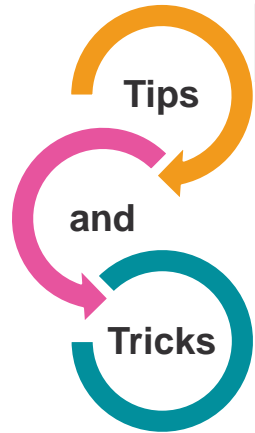
❖ Click gear icon on any grid column



❖ Click Column Chooser

❖ Hide button hides column-changes to “Show”

❖ Show button shows column-changes to “Hide”



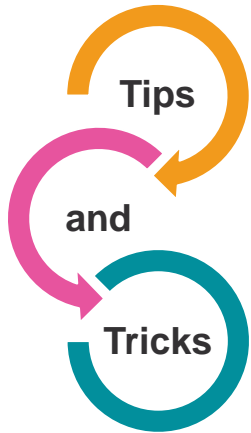
Column Chooser	
Hide	Employee Number
Hide	Employee Name
Hide	Address
Hide	Date Of Birth
Hide	Race
Hide	Gender
Hide	Pension Number
Hide	SSN

Column Chooser		Reset
Hide	Employee Number	
Hide	Employee Name	
Hide	Address	
Show	Date Of Birth	
Hide	Race	
Show	Gender	
Hide	Pension Number	
Show	SSN	

Employee Information Export Report grid – Column Chooser cont.

Grid result – Date of Birth, Race and SSN are hidden:

Employee Num...	Employee Name	Address	Race	Pension Number
▽ Equals...	▽ Thing	▽ Contains...	▽ Contains...	▽ Contains...
3417	Three, Thing	333 Fluffy Boulevard LO...	O - Other	
3416	Two, Thing	222 Wetherby Lane LOV...	O - Other	
3415	One, Thing T1	1111 Thing Drive LOVELY...	O - Other	

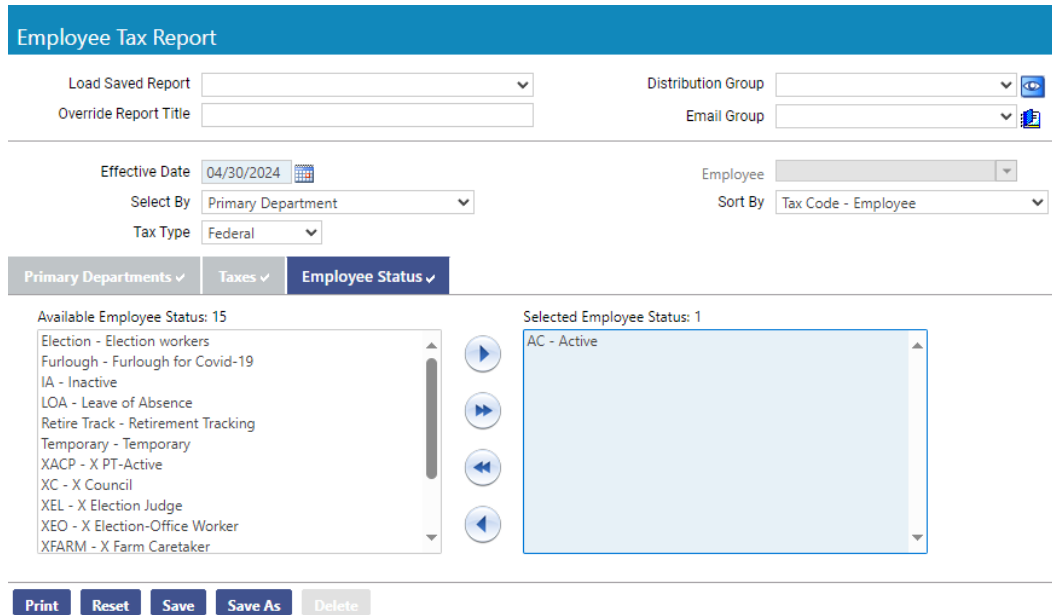


Export to Excel result:

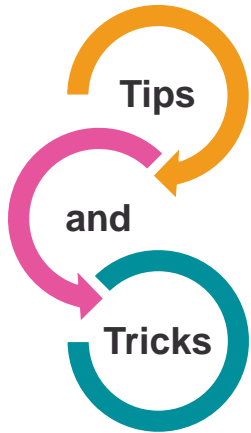
Employee Number	Employee Name	Address	Race	Pension Number
3417	Three, Thing	333 Fluffy Boulevard LOVELY, KY 41231	O - Other	
3416	Two, Thing	222 Wetherby Lane LOVELY, KY 41231	O - Other	
3415	One, Thing T1	1111 Thing Drive LOVELY, KY 41231	O - Other	

Employee Tax Report

HR > Reports > Employee Reports > Employee Tax Report



The screenshot shows the 'Employee Tax Report' interface. At the top, there's a blue header with the title. Below it are several input fields: 'Load Saved Report' (dropdown), 'Override Report Title' (text), 'Distribution Group' (dropdown), and 'Email Group' (dropdown). Further down, there are fields for 'Effective Date' (calendar icon), 'Employee' (dropdown), 'Select By' (dropdown), and 'Sort By' (dropdown). A 'Tax Type' dropdown is also present. Below these fields are three tabs: 'Primary Departments', 'Taxes', and 'Employee Status'. The 'Employee Status' tab is active, showing a list of available statuses on the left and a selected status on the right. The available statuses include: Election - Election workers, Furlough - Furlough for Covid-19, IA - Inactive, LOA - Leave of Absence, Retire Track - Retirement Tracking, Temporary - Temporary, XACP - X PT-Active, XC - X Council, XEL - X Election Judge, XEO - X Election-Office Worker, and XFARM - X Farm Caretaker. The selected status is 'AC - Active'. At the bottom, there are buttons for 'Print', 'Reset', 'Save', 'Save As', and 'Delete'.



- ❖ Select by Primary Dept or Employee
- ❖ Select Tax Type for desired report info
- ❖ Select desired Sort By

Employee Tax Report Cont.



Employee Tax Report

Effective 04/30/24
Sort by Tax Code - Employee

Employee

Tax Code **Fed - Federal Tax Test**

3409 Buttski, Abbie D

Tax Type **Federal**
Effective Date **02/03/2024**
End Date **12/31/9999**
Exempt **No**
Withholding Status **Single**
Number of Exemptions **0**

Additional Percent

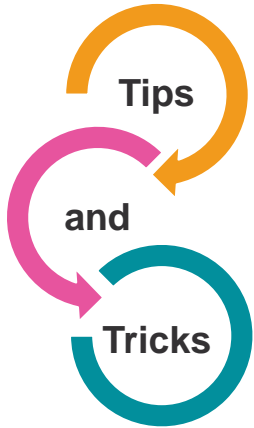
Box 3 Dependent Exemption **.00**
Box 4a Other Income **.00**
Box 4b Other Deductions **.00**
Box 4c Extra Withholding

3410 DeCare, Sabrina

Tax Type **Federal**
Effective Date **02/10/2020**
End Date **12/31/9999**
Exempt **No**
Withholding Status **Married**
Number of Exemptions **0**

Additional Percent

Box 3 Dependent Exemption **.00**
Box 4a Other Income
Box 4b Other Deductions
Box 4c Extra Withholding



Employee Tax Report Cont.



Employee Tax Report

Effective 04/30/24

Sort by Primary Department - Tax Code - Employee

Employee

Primary Department TEST DEPARTMENT

Tax Code FT - Federal Tax

2898 Abela, Syed R

Tax Type	Federal	Additional Percent
Effective Date	06/01/2017	
End Date	12/31/9999	Box 3 Dependent Exemption
Exempt	No	Box 4a Other Income
Withholding Status	Single	Box 4b Other Deductions
Number of Exemptions	0	Box 4c Extra Withholding

Tax Code FT - Federal Tax Totals Employees 1

Primary Department Admin Name - Changed/Administrative Services - Change

Tax Code Fed - Federal Tax Test

3645 Gander, Micht

Tax Type	Federal	Additional Percent
Effective Date	01/01/2022	
End Date	12/31/9999	Box 3 Dependent Exemption
Exempt	No	Box 4a Other Income
Withholding Status	Married	Box 4b Other Deductions
Number of Exemptions	0	Box 4c Extra Withholding

3415 One, Thing T1

Tax Type	Federal	Additional Percent
Effective Date	06/19/2023	
End Date	12/31/9999	Box 3 Dependent Exemption .00
Exempt	No	Box 4a Other Income .00
Withholding Status	Married	Box 4b Other Deductions .00
Number of Exemptions	0	Box 4c Extra Withholding

3408 Smith, John MedicareNoLimit

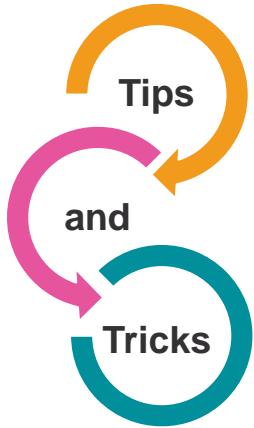
Tax Type	Federal	Additional Percent
Effective Date	01/01/2021	
End Date	12/31/9999	Box 3 Dependent Exemption
Exempt	No	Box 4a Other Income
Withholding Status	Single	Box 4b Other Deductions
Number of Exemptions	0	Box 4c Extra Withholding

3417 Three, Thing

Tax Type	Federal	Additional Percent
Effective Date	07/01/2021	
End Date	12/31/9999	Box 3 Dependent Exemption
Exempt	No	Box 4a Other Income
Withholding Status	Married	Box 4b Other Deductions
Number of Exemptions	2	Box 4c Extra Withholding

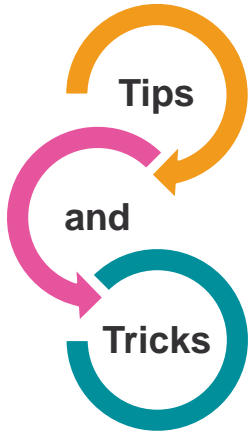
3416 Two, Thing

Tax Type	Federal	Additional Percent
Effective Date	04/01/2024	
End Date	12/31/9999	Box 3 Dependent Exemption .00
Exempt	Yes	Box 4a Other Income .00
Withholding Status		Box 4b Other Deductions .00
Number of Exemptions		Box 4c Extra Withholding



Position Audit Report

Human Resources > Reports > Position Control > Position Audit Report



https://trovmebase01.corp.tylertechnologies.com/nwerp/LogosSuite/SQLReports/SQLReportViewer.aspx?ReportGUID=e043b0d1-5215-4894-a376-8f4c97659

Position Audit Report

As of 04/30/24

Position	Department	Benefit Group	Pay Group	Workers' Compensation	Pay Type
0000-000-01 - Teacher - 180 days - Jerri Test 3415 - One, Thing T1	ADM_ADM - Admin Name - Changed/Administrative Services - Change	FT - Non Union-FT	JA - Jerri Test BW Pay Group	8810 - Clerical 7520 - Waterworks	Annual
<i>Position Distribution</i>		<i>Amount</i>	<i>Employee Distribution</i>		<i>Amount</i>
500 - test		100.00%	101-40-44 - General Test-Fire-Fire Operations		100.00%
<i>Position Distribution</i>		<i>Amount</i>	<i>Employee Distribution</i>		<i>Amount</i>
500 - test		100.00%	576-93 - New Fund-Parks and recreation		100.00%
<i>Position Distribution</i>		<i>Amount</i>	<i>Employee Distribution</i>		<i>Amount</i>
500 - test		100.00%	270-62-64-6412 - Ice Arena-Recreation / Parks-Recreation Facilities-Ice Arena Administration		100.00%

Position List
Position - 0000-000-01 - Teacher - 180 days - Jerri Test

Attribute: Position

Description: Teacher - 180 days - Jerri Test
Number: 0000-000-01
Active:

Effective Date: 09/27/2023 - Open
Start Date: 09/27/2023

Position Information

Department: ADM_ADM - Admin Name - C
Benefit Group: FT - Non Union-FT
Union Code: Union 1234
Worksite: Test - Test
Character: Full Time - No Job Sharing
Job Type:
Certified:
Workers' Comp Code: 8810 - Clerical
EEOC Category:
EEOC Function:
Annual Survey Function:
Manager:
Managing Position:
Elected Official:
Appointed:

Payroll Information

Pay Group: Jerri Test BW Pay Group
Grade:
Pay Type:
Grade Minimum:
Grade Maximum:
FLSA Code:
Budgeting Information

Applies To Budget: Budgeted
Approved FTE: 1.00
Requested FTE:
Position Class:
Use Budget Schedule for Budgeting:

G/L Distribution

G/L Organization Set	Percent
500 - test	100.0000%

Position Audit Report Cont.

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

Employee Search
Two, Thing (3416)

07/01/2021

Personal | Employment | **Jobs** | Payroll Data | Contracts | Employer Reporting

SOC Code

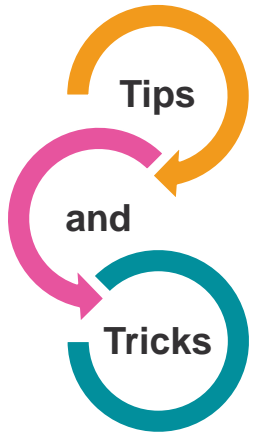
NYSLRS

NYSLRS Employee Class
NYSLRS Job Code
NYSLRS Employment Instance

PAY RATES

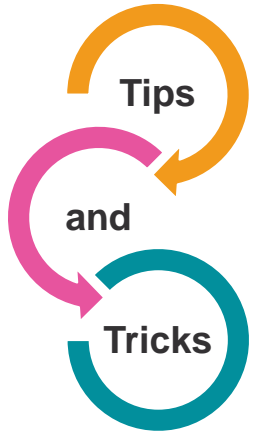
Next Raise Date 08/01/2021
Test

Job Event / Reason	
Job Event	Event Reason
Position 0000-000-01 - Teacher - 180 days - Jerri Test	Union Code
Title	Worksite
Certified Non-Certified	Workers' Comp Code
Position Entry Date 07/01/2021	EEOC Category
Department ADM_ADM - Admin Name - Changed/Administrative Services - Change	EEOC Function
Department Entry Date 07/01/2021	Annual Survey Function
EEOC Assignment Classification	



Quarterly 941 Issue

If your Earnings History Report for a quarter and the Quarterly Wage Report match, but the Quarterly 941 does not and it is a lower amount on the federal wages. . .



- ❖ the first place to look is the 1099 checkbox on the Employment tab in Workforce Administration
- ❖ run a New Hire Report for the quarter reported and check those employees first
- ❖ run Employee Information Report for the section Employment and search for a green checkmark

Quarterly 941 Issue cont.



Employee Information Report

Effective 05/14/24

Sort by Employee

Employee	Status	Department	Title	Benefit Group
6565 Hoops, Indiana	Active	O/M/Park Maintenance	5602-254-01 - Farm Caretaker	Directors-FT

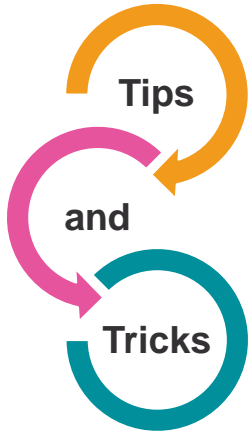
EMPLOYMENT

Status Information

Status **Active**
Status Event
Event Reason
Employment Type
Employment Class
EEOC
Company
1099
Comments

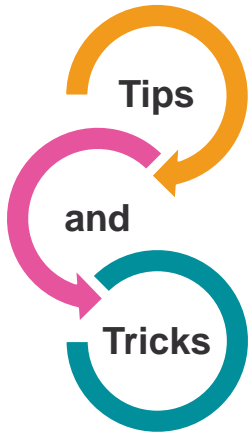
Date Selection

Hire Date **07/07/2007**
Benefit Date **07/07/2007**
Accrual Date **07/07/2007**
Seniority Date **07/07/2007**
Seniority Rank
Termination Date
IMP Start Date



Saved Reports

- ❖ Wonderful tool for reports that are generated often
- ❖ Eliminates “recreating the wheel” each time
- ❖ Always review them to be certain that new hours codes, departments, benefit groups or pay groups have been included and resaved – these components will depend on the report being generated.



The screenshot shows the "Earnings History Report" interface. A pink arrow points to the "Load Saved Report" dropdown menu, which is currently set to "By Year All". Another pink arrow points to the "Pay Groups" tab, which is active. Below the tab, there are two lists of pay groups: "Available Pay Groups: 2" (listing "W - Weekly" and "W42 - Weekly No Summer Pay") and "Selected Pay Groups: 17" (listing "Adjustment - Adjustment", "B - Biweekly", "D - Daily", "DBW - DAVE BW", and "Def Comp - Deferred Comp").

QUESTIONS

THANK YOU FOR ATTENDING CONNECT 2024

Jerri Ainsworth
HR Support Specialist
jerri.ainsworth@tylertech.com
877-734-3315



Your feedback is important

Please complete the session survey via the mobile app

We read every submission

We use your input to guide content for future sessions and
to improve our presentations