



HUMAN RESOURCES

RELEASE NOTES – SEPTEMBER 2015

This document explains new product enhancements added to the ADMINS Unified Community for Windows **HUMAN RESOURCES** system and installed on your site in September 2015.

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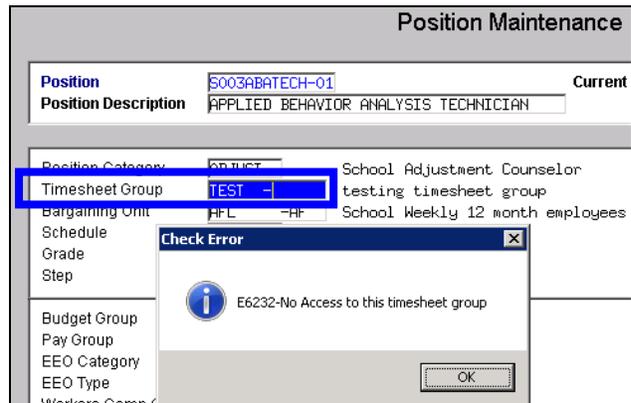
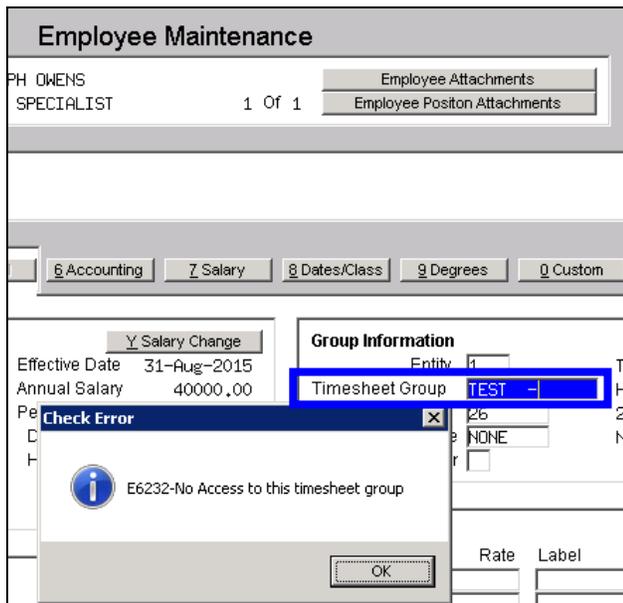
1. MAINTENANCE

1.1. Access to Timesheet Groups When Maintaining Employees and Positions

When an employee or position is added or edited, the user making the change must have access to the timesheet group. Prior to the update, a user could enter a timesheet group for which they had no access.

Now, if the user adds a new employee or position, or tries to change the timesheet group for an existing employee or position, the system will perform an error check. If they do not have access to the timesheet group, an informational message will appear.

In the example below, the user attempts to change the existing timesheet group to a new timesheet group named “TEST”. Since the user does not have access to the “TEST” timesheet group, the change is not made, a message is displayed, and the timesheet group reverts to the original value.



[ADM-AUC-HR-9531]

1.2. Date Checking

More error checking was added for dates on employee maintenance screens. To access the screen, select **Human Resources** ► **Maintenance** ► **Employee Maintenance** ► **Dates/Class**.



The screenshot shows the 'Employee Maintenance' interface. The 'Dates/Class' tab is highlighted with a blue circle. The employee information includes Employee Number 070634 and Position E005ABATECH-01 APPLIED BEHAVIOR ANALYSIS TEC 1 Of 1. A 'No picture on file' message is visible in the top right corner.

Evaluation Date

Check Error
E6390-Date entered must be on or before today

OK

Termination Date

Check Error
E5010-Date entered not between 40 years back and one year forward

OK

Next Evaluation Date

Check Error
E6391-Date entered must be after last evaluation date and within 24 mos.

OK

Retirement Date

Check Error
E6107-Entered Date outside boundaries of Today - 80 years and Today + 5

OK

More error checking was added to the **Degrees** tab. To access the feature, select **Human Resources ► Maintenance ► Employee Maintenance ► Degrees ► Add Skill**. The date range must be within forty years back to one year forward.

The screenshot shows the 'Employee Maintenance' interface with the 'Degrees' tab selected. The 'Add Skill' button is highlighted with a blue circle. The employee information includes Employee Number 070634 and Position E005ABATECH-01 APPLIED BEHAVIOR ANALYSIS T 1,00. A 'No picture on file' message is visible in the top right corner.

[AUC] 6446-Employee Maintenance [theresa]
Add Skill Code
Required: Enter Skill Code 17 PHYSICS
Required: Enter Effective Date (mmddyyyy) 08151968

Lookup OK Cancel Clear All

[AUC] 6446-Employee Maintenance
P6162-Date can be FORTY years back or ONE year forward.

OK

[ADM-AUC-HR-9543]



1.3. Employee Maintenance ► Deduction / Benefit Tab

1.3.1. Copy Bank, Account Type and Prenote to All Positions

On a net direct deposit deduction, if the bank, bank account or prenote are updated on one position, and if there is more than one position for that employee, the system will ask if this change should be copied over to **ALL** positions. If the answer is **Yes**, the system will either **add** the cost code or **update** the information for the net deposit for all positions.

Similarly, if a **STOP** date is set for a net direct deposit, all positions will be updated with the **STOP** date for the direct deposit.

The screenshot shows the 'Employee Maintenance' screen for Employee Number 070329, KAREN J THOMAS. The 'Ded/Ben' tab is active, displaying a table of direct deposits:

CostCode	Effective	Stop Date	Table	Amount	Message	Additional Amount	Additional Start Date	Additional Stop Date	Orig Amt
DEF-OB	11-Jul-2012			7,5000X					
DIRDEP	31-Aug-2015			999,999,99					
MEDI	11-Jul-2012			1,4500X					

A dialog box is displayed with the question: "P6149-Do you want to copy this direct deposit record to all positions?". The 'Yes' button is highlighted.

This is in effect for both Active and Inactive positions for a given employee.

[ADM-AUC-HR-9622]

2. AFFORDABLE CARE ACT (ACA) – REPORTING

Added new functionality to capture Employer-Provided Health Insurance Offer and Coverage Information for annual ACA reporting. A new tab called "ACA" has been added to the Employee Maintenance screen.

The screenshot shows the 'Employee Maintenance' screen for Employee Number 000000. The 'ACA' tab is highlighted in red in the bottom navigation bar. The screen displays 'No Active Positions' and 'No text available' in the notes field. The 'Current Positions' table shows 000 active and 000 inactive positions.

ADMINS, Inc. staff will be conducting webinar session(s) to introduce this new feature to our clients. Please watch for the invitation coming out in mid-September.



Employee ACA

Goto...

Employee Number 000012 MARIE R HOLMES

Employee Attachments (1)

Actions

Employee Position Attachments

Add Employee

Add Position

Current Positions

S009SPDISPE SPEECH THERAPIST 1.00
All Positions 000

1 Contact

2 Personal

3 Ded/Ben

4 Add Wages

5 Payroll

6 Accounting

7 Salary

8 Dates/Class

9 Degrees

0 Custom

U Accidents

V ACA

Reporting Entity or Reporting Bargaining Unit	#1	#2	#3	#4
ACA Offer Start / End	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ACA Employment Start / End	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ACA Full Time Start / End	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ACA Coverage Declined	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add Line	Covered Individuals:	Line	First Name	Middle Initial	Last Name	Suffix	SS#	Birth Date	#1	#2	#3	Coverage Start	Coverage End
Clear		1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	000-00-0000	<input type="text"/>	#1	#2	#3	<input type="text"/>	<input type="text"/>
		2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	000-00-0000	<input type="text"/>	#1	#2	#3	<input type="text"/>	<input type="text"/>
		3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	000-00-0000	<input type="text"/>	#1	#2	#3	<input type="text"/>	<input type="text"/>
		4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	000-00-0000	<input type="text"/>	#1	#2	#3	<input type="text"/>	<input type="text"/>

Figure 1 ACA Entry Screen

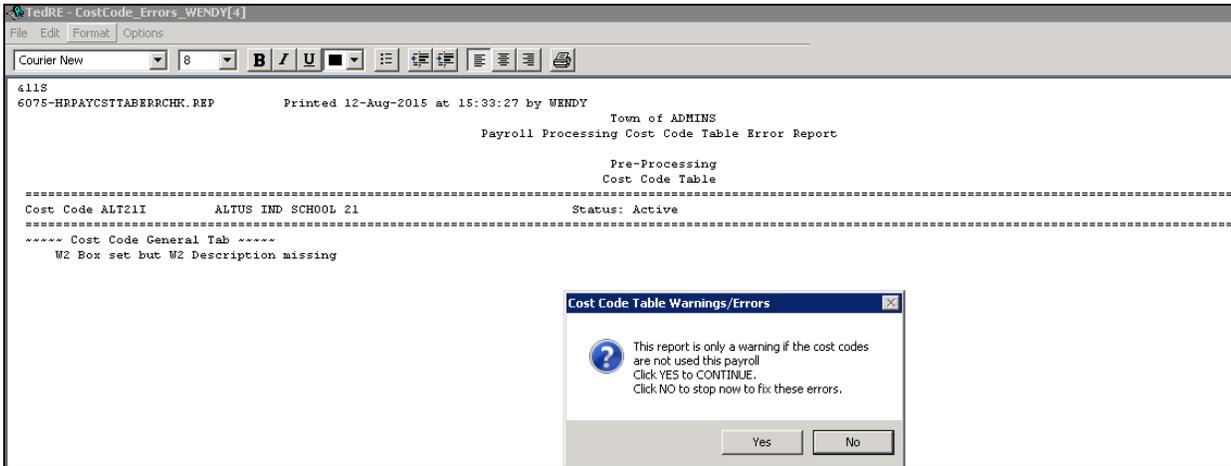
In addition to capturing the data elements, tax form and reporting features will be available for year-end reporting requirements. In October, clients will receive a letter from ADMINS, Inc. outlining the paper stock requirements needed to order stock for producing the tax forms.

[ADM-AUC-HR-9598]

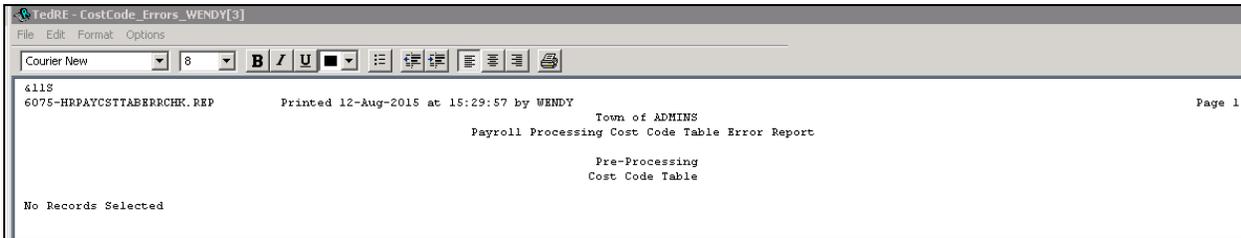
3. PAYROLL PROCESSING

3.1. Cost Code Warning Message

The payroll process checks for Cost Code errors and provides a report and warning if there are cost code errors. The warning message prompt will allow the payroll processor to either stop the process to correct any errors relevant to the current payroll, or to continue.



Prior to the software update, the warning message prompt would appear even when the report showed no errors. This was corrected. Now the report will be produced, and if it shows that No Records are Selected, then no warning message and prompt will appear.



[ADM-AUC-HR-9611]

3.2. Terminated Employee Timesheet Report

Sites create timesheets for payroll warrants some time prior to the payroll actually being calculated. A new report is produced during the **payroll calculation** step to identify when a termination date is entered on an employee record after a warrant was created and timesheets generated. The report is generated when payroll is **calculated** to alert you of current **timesheets that have already been created for a newly terminated employee.**

For example, the employee # 70589 below has a timesheet created in the current warrant #081515. The warrant was created on August 5, for the pay period from August 12 through August 18.

Timesheet Entry										
Warrant	081515		12-Aug-2015		18-Aug-2015		Annual	47257.60	Bargaining Unit	DF
Timesheet Group	TCMN -DPH		PUBLIC WORKS		Period	908.80				
Employee	070589		HARTE, LAWRENCE A		Per-Diem	181.76				
Position	T422DPWDROP-01		Driver/Operator/Pipefitter UHL		Daily	181.76				
Hourly					Hourly	22,7200				
Work Date	Day	Pay Code	Hours	Days	Rate	Flat \$	Amount	Sep Chk	Account	
12-Aug-2015	Wed	REG	8.00		22,7200		181.76		0200-450-0000-004-00-00-51130	
13-Aug-2015	Thu	REG	8.00		22,7200		181.76		0200-450-0000-004-00-00-51130	
14-Aug-2015	Fri	REG	8.00		22,7200		181.76		0200-450-0000-004-00-00-51130	
17-Aug-2015	Mon	REG	8.00		22,7200		181.76		0200-450-0000-004-00-00-51130	
18-Aug-2015	Tue	REG	8.00		22,7200		181.76		0200-450-0000-004-00-00-51130	



The employee was terminated with a date of August 11, which falls within the pay period of the warrant for which time sheets already exist.

Employee Maintenance			
Employee Number	070589	LAWRENCE A HARTE	Employee Attach
Position	T422DPWDROP-01	Driver/Operator/Pipefitter UNL 1 Of 1	Employee Postion
Terminated 11-Aug-2015			

The warrant is calculated and the report is generated showing that the employee was terminated on 11-August-2015 and lists all the open warrants with timesheets for the employee.

```

6243-HRTMSEMPDEL.REP          Printed 12-Aug-2015 at 14:33:07 by WENDY
                                Town of ADMINS
                                Terminated Employee Timesheet Report

Employee: 070589 HARTE, LAWRENCE A
Position: T422DPWDROP-01
Termination Date: 11-Aug-2015

=====
Warrant TimesheetCrp  Work Date  Pay Code  PC Description          Rate  Flat Amt  Hours  Days  Pay Amount
=====
081515  TOWN  -DPW    12-Aug-2015  REG    REGULAR - hours        22.7200      8.00      181.76
081515  TOWN  -DPW    13-Aug-2015  REG    REGULAR - hours        22.7200      8.00      181.76
081515  TOWN  -DPW    14-Aug-2015  REG    REGULAR - hours        22.7200      8.00      181.76
081515  TOWN  -DPW    17-Aug-2015  REG    REGULAR - hours        22.7200      8.00      181.76
081515  TOWN  -DPW    18-Aug-2015  REG    REGULAR - hours        22.7200      8.00      181.76
081515                                     Employee Total:         40.00      908.80
=====
902549  TOWN  -DPW    24-Jul-2014  REG    REGULAR - hours        22.7200      8.00      181.76
902549  TOWN  -DPW    25-Jul-2014  REG    REGULAR - hours        22.7200      8.00      181.76
902549  TOWN  -DPW    28-Jul-2014  REG    REGULAR - hours        22.7200      8.00      181.76
902549  TOWN  -DPW    29-Jul-2014  REG    REGULAR - hours        22.7200      8.00      181.76
902549  TOWN  -DPW    30-Jul-2014  REG    REGULAR - hours        22.7200      8.00      181.76
902549                                     Employee Total:         40.00      908.80
=====

```

As shown above, the report lists any timesheets, dated before or after the termination date. A message prints at the bottom of the report notifying the payroll processor that the terminated employee will be paid unless the timesheets are manually removed from the entry file.

```

=====
Legend:
=====
Employee will be paid for the above timesheets unless they are deleted from the timesheet entry file
=====

```

If the termination date for the employee does not fall within an open warrant pay period, the employee timesheet records will not be listed on this report.

[ADM-AUC-HR-9501]

4. TIMESHEET ENTRY

4.1. Splitting a Day to Add Leave

Leave accrual is based on an employee's position. To view the accrual, look at the position specified on the employee record. Go to the **Position Maintenance** screen to see the **Accrual Group**.



Employee Maintenance [TRAINING]

Position: 310-0480-003 Maintainer I

In this example the Accrual Group is **PWD1**. Looking at the accrual group setup in the **Leave Accrual Rules** table, the leave is accrued in **DAYS**.

Position Maintenance

Position: 310-0480-003
Position Description: Maintainer I

Position Category: []
Timesheet Group: 310-01 Buildings & Grounds
Bargaining Unit: PW -00 Public Works
Schedule: MAINTI Maintenance Man I
Grade: 1
Step: 3

Budget Group: UNCL Unclassified
Pay Group: 26 BI-WEEKLY
EEO Category: 00
EEO Type: 00
Workers Comp Code: []
FLSA Code: NONE NONE
Employment Type: FT Full Time
Employment Status: A Active
Accrual Group: PWD1 Public Works
Entity: Town of Plainville, CT

[PCT] 6434-Leave Accrual Rules [TRAINING] [tmupdev3]

Accrual Group: PWD1 Public Works
Leave Type Code: VAC Vacation

Seq#	From Month	To Month	Days	Hours	Hours/Day	% of	Accrue During Pro
1	1	69	10,00				Yes
2	60	119	15,00				No
3	120	239	20,00				
4	240	252	21,00				
5	253	263	22,00				
6	264	276	23,00				
7	276	287	24,00				
8	288	999	25,00				

Prior to the software update, during timesheet entry, the system allowed splitting a day using a **leave** code that was calculated for **hours** when the employee's **leave** code accrual was based on **days**. Restrictions have been added so that when splitting a day, the correct pay code must be used.

If an employee accrues leave in "**days**", a "**day based**" pay code for splitting a day must be used for leave. For example, if the employee's leave is based on **days**, an error message is displayed if a pay code based on **hours** is used when splitting a day.



Conversely, if an employee accrues leave in **hours**, an **hour-based** pay code must be used for splitting a day.

[ADM-AUC-HR-9617]

5. VOID/MANUAL/FIGURE PAYCHECK

5.1. Recalculate Check

When processing a void or manual check, the recalculated check was out of balance. Individual deductions and benefits did not match the check total. This was corrected. To access the screen, select **Human Resources** ► **Void/Manual/Figure Paycheck**.

[ADM-AUC-HR-9609]



5.2. Void Manual Edit List

The edit list was printing the literal “day” instead of the day of the week after the pay date. This was corrected.

6208-HRVOIDMANUALEDT.REP Printed 30-Jun-2015 at 13:30:42 by THERESA
Town of ADMINS
Timesheet Void and Manual Edit List

Work Date Day Pay Code Account#
=====

Warrant: 902875 Period Ending : 25-Mar-2015

Employee : 001255 CREASIA, KAREN

Position : T135HR OFCR- HUMAN RESOURCES DIRECTOR

Work Date	Day	Pay Code	Account#
01-Apr-2015	day	DREG	1000-135-0000-001-00-00-51115
02-Apr-2015	day	DREG	1000-135-0000-001-00-00-51115
03-Apr-2015	day	DREG	1000-135-0000-001-00-00-51115
06-Apr-2015	day	DREG	1000-135-0000-001-00-00-51115
07-Apr-2015	day	DREG	1000-135-0000-001-00-00-51115

Total # record for Position 5
Total # record for Employee 5

Figure 2 Before

6208-HRVOIDMANUALEDT.REP Printed 14-Aug-2015 at 18:34:15 by WENDY
Town of ADMINS
Timesheet Void and Manual Edit List

Work Date Day Pay Code Account#
=====

Warrant: 001515 Period Ending : 18-Aug-2015

Employee : 000152 GARIEFY, KEITH C

Position : T123TWNADMN- TOWN ADMINISTRATOR

Work Date	Day	Pay Code	Account#
01-Apr-2015	Wed	DREG	1000-123-0000-001-00-00-51110
02-Apr-2015	Thu	DREG	1000-123-0000-001-00-00-51110
03-Apr-2015	Fri	DREG	1000-123-0000-001-00-00-51110
06-Apr-2015	Mon	DREG	1000-123-0000-001-00-00-51110
07-Apr-2015	Tue	DREG	1000-123-0000-001-00-00-51110

Total # record for Position 5
Total # record for Employee 5

Figure 3 After

[ADM-AUC-HR-9618]

5.3. Void Manual Pay Register

The Void Manual Pay Register was printing the account numbers without the hyphens. This was corrected.

Town of ADMINS
Void/Manual Pay Register

Ass Pay:	932.00	Federal Tax Wages	841.02	State Tax
Contributions:	932.00	Medicare Wages	932.00	Pension Plan
Net Pay:		State Taxable Wages	932.00	
		Retirement Wages	932.00	
Benefits:	13.51	Total Wages	932.00	
Deposit:	658.36	Federal Taxes	-119.75	

Rate	Flat Amt	Pay Amount	Position	Account
23.3000	186.40	T210P0LOFF 01	10002100000002000051150	
23.3000	186.40	T210P0LOFF 01	10002100000002000051150	
23.3000	186.40	T210P0LOFF 01	10002100000002000051150	
23.3000	186.40	T210P0LOFF 01	10002100000002000051150	
23.3000	186.40	T210P0LOFF 01	10002100000002000051150	
23.3000	186.40	T210P0LOFF 01	10002100000002000051150	
23.3000	186.40	T210P0LOFF 01	10002100000002000051150	
23.3000	186.40	T210P0LOFF 01	10002100000002000051150	
23.3000	186.40	T210P0LOFF 01	10002100000002000051150	
23.3000	186.40	T210P0LOFF 01	10002100000002000051150	
23.3000	186.40	T210P0LOFF 01	10002100000002000051150	

Figure 4 Before

Town of ADMINS
Void/Manual Pay Register

Ass Pay:	1,221.11	Federal Tax Wages	1,115.17	State Tax
Contributions:	298.21	Medicare Wages	1,226.42	Pension Plan
Net Pay:	922.90	State Taxable Wages	1,221.11	
		Retirement Wages	1,221.11	
Benefits:	23.09	Total Wages	1,221.11	
Deposit:		Federal Taxes	-83.62	

Rate	Flat Amt	Pay Amount	Position	Account
245.1100	122.56	T421DPWF0RE-01	1000-421-0000-004-00-00-51122	
245.1100	110.30	T421DPWF0RE-01	0200-450-0000-004-00-00-51122	
245.1100	12.25	T421DPWF0RE-01	0300-460-0000-004-00-00-51122	
245.1100	122.56	T421DPWF0RE-01	1000-421-0000-004-00-00-51122	
245.1100	110.30	T421DPWF0RE-01	0200-450-0000-004-00-00-51122	
245.1100	12.25	T421DPWF0RE-01	0300-460-0000-004-00-00-51122	
245.1100	122.56	T421DPWF0RE-01	1000-421-0000-004-00-00-51122	
245.1100	110.30	T421DPWF0RE-01	0200-450-0000-004-00-00-51122	
245.1100	12.25	T421DPWF0RE-01	0300-460-0000-004-00-00-51122	
245.1100	122.56	T421DPWF0RE-01	1000-421-0000-004-00-00-51122	
245.1100	110.30	T421DPWF0RE-01	0200-450-0000-004-00-00-51122	

Figure 5 After

[ADM-AUC-HR-9618]

6. SPECIAL PROCESSING

6.1. Longevity Calculation Corrected

If longevity is based on a period of time (see longevity table) and the employee had more than 100 historical paychecks, the calculation was not correct. This has been corrected. To access this table, select **Human Resources** ► **Tables** ► **Bargaining Unit** ► **Longevity Pay** tab or select **Human Resources** ► **Special Processing** ► **Longevity Processing** ► **Bargaining Unit Table –Longevity**.



Special Processing

- Benefit Statements
- Global Change to Employees Salary
- Increase Employees Steps Process
- Retroactive Pay Processing
- Longevity Processing**

Longevity Processing

Description	Date
Reset Longevity Pay Files	17-Aug-2015
Bargaining Unit Table - Longevity	17-Aug-2015
Calculate Longevity Pay	
Longevity Pre - Posting Report	
Maintain Selected Employees	
Move Longevity to Uncalculated Warrant	

Bargaining Unit Table - Longevity

Bargaining Unit: 20 -3 POLICE STATE PENSION

1 Cost Codes 2 Holiday 3 Longevity Pay 4 Retroactive Pay 5 Salary Sched 6 Other Info Benefit Statements

From Month	To Month	Flat Amount	% of Gross	\$ Times Grade
1	47			
48	83		10.00	
84	143		11.00	
144	203		12.00	
204	899		13.00	

Pay Code: LONG3 LONGEVITY POLICE-NO PENSION PRIOR
Measure Date: LONGEVITY Longevity Date

Calculate Salary for this Period

Period Start Date: 01-Jul-2014
Period End Date: 30-Jun-2015
Override Gross with Base Bucket: 15
Override % with User Defined D2 Field: 15

Pay Options:
 On demand
 Every Pay Period
 Automatically on this Date Month Day
 Automatically on

Calculate as of: 30-Jun-2015 ** Optional **
Last On Demand Posting Date: 30-Jun-2015

```

=====
Length of Svc Percentage Longevity
#Months #Years of Gross Longevity W Amount
=====
268 22 13.00 954,885.73 124,135.65
=====

```

Figure 6 Before

```

=====
Length of Svc Percentage Longevity
#Months #Years of Gross Longevity W Amount
=====
268 22 13.00 88,958.64 11,564.67
=====

```

Figure 7 After

[ADM-AUC-HR-9616]

7. QUERIES

7.1. Check History Screen

There was a limit on the detail check history screen that has been fixed to now correctly show all wages. Before, if the wage records were over a certain limit, they were not displayed properly. To view this screen, select **Human Resources** ▶ **Queries** ▶ **Paycheck History – Inquiry** ▶ **Detail**.



Paycheck History-Check Detail

Employee # 000092 CUMBERBATCH, BENEDICT M	Check Date 09-Feb-2005	Gross Pay 1021,44
Check 0950808 Deposit Advice	Warrant 901213 Batch	Deductions 1021,44
Bank PAYROLL - CITIZENS BANK	Period Ending 02-Feb-2005	Net Pay
Number Pays 1 Period WE	Void Date	Benefits 14,81

5 Wages/Deductions/Benefits		6 Base Buckets			
Wages	Amount	Deductions	Amount	Benefits	Amount
QUINN BILL	170,24	DEFERRED COMP	30,00	MEDICARE	14,81
REGULAR	212,80	DIRECT DEPOSIT	400,00		
SICK LEAVE	638,40	FEDERAL TAX	98,01		

Code	Description	Check	Warrant	Date	Account	Amount	Tot
SIC	SICK LEAVE - HOURLY	0950808	901213	09-Feb-2005	1000-210-0000-002-00-00-51150	638,40	
Total for This Category						638,40	

[ADM-AUC-HR-9614]

8. REPORTS

8.1. Timesheet Group/Pay Code Reports Modified

There are four timesheet reports by Timesheet Group/Pay Code.

- 6222 – Timesheet Entry Detail by Timesheet Group/Pay Code
- 6234 - Timesheet Entry Summary by Timesheet Group/Pay Code
- 6249 - Timesheet History Detail by Timesheet Group/Pay Code
- 6254 – Timesheet History Summary by Timesheet Group/Pay Code

These reports have been modified to include selection on account number and pay categories.

Task 6254: Timesheet History Summary by TS Group/Pay Code

Timesheet History Summary by Pay Code

Required: Work Date Range (mmddyyyy) From: 01012014 To: 12312014

Optional: Enter Posted Warrant # []

Optional: Enter up to 9 Timesheet Groups [Edit] [0 values:]

Optional: Enter up to 9 Employee# [Edit] [0 values:]

Optional: Enter up to 9 Bargaining Units [Edit] [0 values:]

Optional: Enter up to 9 Pay Codes [Edit] [0 values:]

Run as Preview Print PDF Excel

Figure 8 Before

Task 6254: Timesheet History Summary by TS Group/Pay Code

Timesheet History Summary by Pay Code

Required: Work Date Range (mmddyyyy) From: 07012014 To: 07312014

Optional: Enter Up to 9 Posted Warrant # [Edit] [0 values:]

Optional: Enter up to 9 Timesheet Groups [Edit] [0 values:]

Optional: Enter up to 9 Employee# [Edit] [0 values:]

Optional: Enter up to 9 Bargaining Units [Edit] [0 values:]

Optional: Enter up to 9 Pay Codes [Edit] [0 values:]

Optional: Enter up to 9 Accounts [Edit] [0 values:]

Optional: Enter up to 9 Categories [Edit] [0 values:]

Run as Preview Print PDF Excel

Figure 9 After

[MAN-SUP-SAPLAUC-301]

8.2. Retrieve Output Files Email Option Added

Prior to the software update, the **Retrieve Output Files** function offered options to:



View a Report
Print a Report

Save & View a Report as a PDF
Download a Report



Figure 10 Before

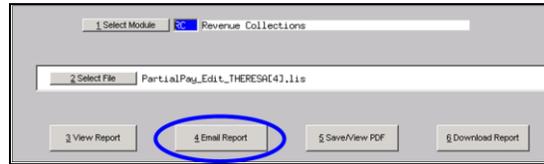
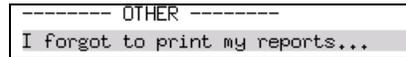


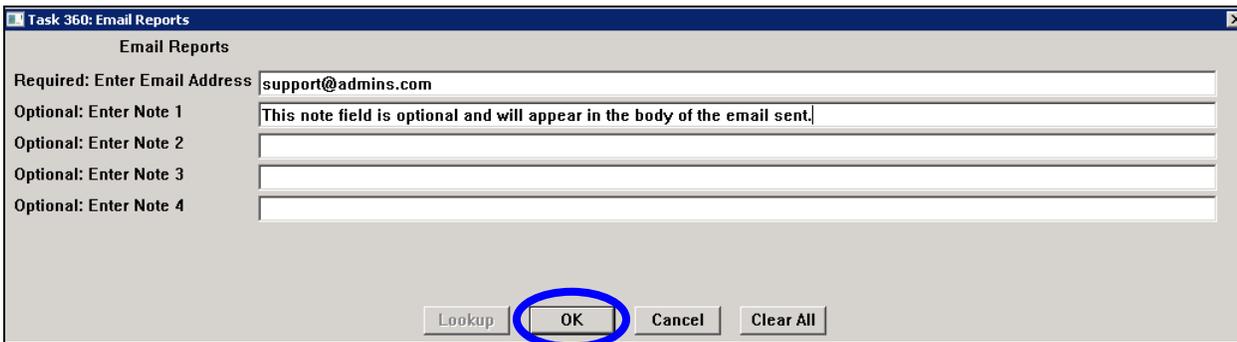
Figure 11 After

Now existing reports may be emailed as a PDF file to anyone with a valid email address. To use this feature, select **Reports** ► **Retrieve Output Files** from the menu.

See the instructions in the Help Reference Library titled:



Click on Email Report and fill in the blanks (only the email address is required; the four notes fields are optional):



In the example above, the report will be sent as a **pdf** file to the email address support@admins.com. A message will appear confirming that the report was emailed. The body of the email message will include the text “Please find attached the report requested to be emailed” followed by any optional note text entered by the user. In addition, the body of the email will include the complimentary close “Thank you” and the name of the user sending the report as specified in the User Profile table in the AUC system. Finally, there will be a message instructing the recipient not to reply to the message as it was automatically generated from the system.

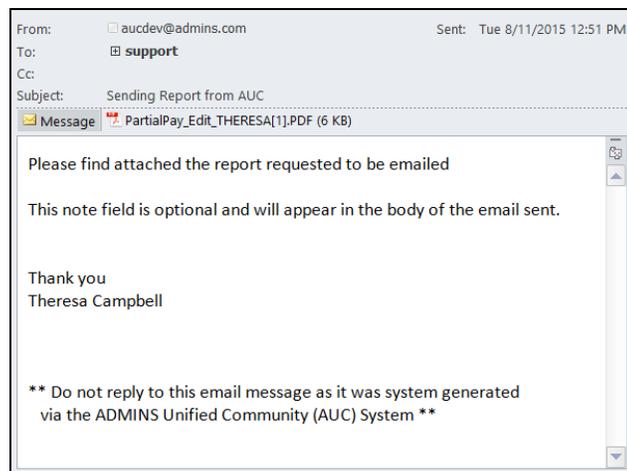
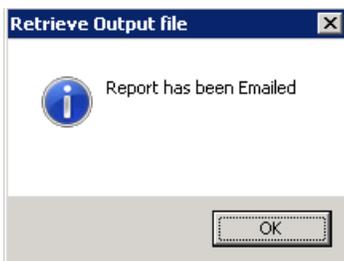


Figure 12 Example of email with an attached report



If you wish to print a retrieved report, you may do so by first clicking [View Report](#) and then selecting File|Print from the menu. This allows you to preview and confirm that you have selected the correct report prior to printing.

[ADM-AUC-SY-7966]

8.3. Default Report Format

The default format for reports generated from commands is now PDF. This will make it easier for users to email reports to any user and allow for printing to any available printer.

[ADM-AUC-FM-8115]

9. TABLES

9.1. Cost Codes

9.1.1. Cost Code Edit List

A column for Flat Amount was added to the Cost Code Listing. Run this report from the Cost Code Table by selecting Edit List.

The screenshot shows the 'Cost Code Table' interface. At the top, there is a 'Goto...' field and an 'Actions' menu. Below that, the 'Cost Code' field is set to '457ROTH' and the description is 'GREAT WEST 457 ROTH'. The 'Calculation' section has three methods: Method 1 (Use Tax Rate Table), Method 2 (Flat Amount \$), and Method 3 (Base Bucket%). The 'Calendar Year Annual Maximums' section includes fields for Bucket Amount, Employee Contribution, and Employer Contribution. At the bottom, there are several buttons: '1 Summary-PayCheck', 'Summary-Benefit St.', '2 Add New', '3 Edit List' (circled in blue), '4 General', '5 Accounting', '6 Base Buckets', '7 Periods to Take', '8 Tiers', and 'Vendor Notes'.

```

6630-HRCSTCOD.REP          Printed 11-Aug-2015 at 15:54:40 by WENDY          Page 1
                          Town of ADMINS
                          Cost Code Listing
=====
Code      Description              Category              Order#  Pretax  Status
=====
01BENS    MEDICARE BENEFIT - CONVERSION    ME    MEDICARE              0      N      Inactive
03BENS    CONVERSION - CAR ALLOWANCE       CAR    CAR ALLOWANCE         1      Y      Inactive
457ROTH   GREAT WEST 457 ROTH              ROTH   ROTH (NON DEFERRED)   105   N      Active
457SB     VOL DEFERRED SEC BEN              DC     DEFERRED COMP         105   Y      Active
AFLND     AFLAC DENTL ND 111F              DE     DENTAL                 0      N      Active
AIM       AIM FUND SERV.                   AN     ANNUITIES              4      N      Inactive
ALT21I    ALTUS IND SCHOOL 21              DE     DENTAL                 102   Y      Active
ALT26S    ALTUS IND SCHOOL 26              DE     DENTAL                 102   Y      Active
ALT41I    ALTUS IND SCHOOL 42              DE     DENTAL                 102   Y      Active
ALT52I    ALTUS IND TOWN 52                DE     DENTAL                 102   Y      Active
=====

```

Figure 13 Before



6630-HRCSTCOD.REP Printed 11-Aug-2015 at 16:16:11 by WENDY
Town of ADMINS
Cost Code Listing Page 1

Code	Description	Category	Flat Amt	Order#	Pretax	Status
01BENS	MEDICARE BENEFIT - CONVERSION	ME MEDICARE	.00	0	N	Inactive
03BENS	CONVERSION - CAR ALLOWANCE	CAR CAR ALLOWANCE	.00	1	Y	Inactive
457ROTH	GREAT WEST 457 ROTH	ROTH ROTH (NON DEFERRED)	.00	105	N	Active
457SB	VOL DEFERRED SEC BEN	DC DEFERRED COMP	.00	105	Y	Active
AFLND	AFLAC DENTL ND 111F	DE DENTAL	.00	0	N	Active
AIM	AIM FUND SERV.	AN ANNUITIES	.00	4	N	Inactive
ALT21I	ALTUS IND SCHOOL 21	DE DENTAL	23.42	102	Y	Active
ALT26S	ALTUS IND SCHOOL 26	DE DENTAL	18.91	102	Y	Active
ALT41I	ALTUS IND SCHOOL 42	DE DENTAL	12.61	102	Y	Active

Figure 14 After

[ADM-AUC-HR-9621]

9.1.2. Cost Code Detail List

The detail list that runs off the Cost Code Table was fixed. To access this list, select **Human Resources ▶ Tables ▶ Cost Code Table ▶ Detail List**.

Cost Code Table

Goto... Actions

2 Cost Code 3 Description

Summary-Benefit St 1 Detail

01BENS	MEDICARE BENEFIT - CONVERSION	ME
03BENS	CONVERSION - CAR ALLOWANCE	CAR
457ROTH	GREAT WEST 457 ROTH	ROTH
457SB	VOL DEFERRED SEC BEN	DC
AFLND	AFLAC DENTL ND 111F	DE
AIM	AIM FUND SERV.	AN

6 Add New 7 Edit List 8 Detail List 9 Emp by Code

Task 6633: Cost Code Detail Listing

Cost Code Detail Listing

Optional: Enter up to 9 Categories Edit 0 values:

Optional: Enter up to 9 Benefit Statgemetrn Categories Edit 0 values:

Restrict on Pre-Tax Codes Yes Only No Only Show Both

Run as Preview Print PDF

If Printing use Duplex Yes No

Look OK Cancel Clear All



6633-HRCSTCODET.REP Printed 14-Aug-2015 at 16:57:11 by THERESA Page 1
Town of ADMINS
Cost Code Detail Listing

Cost Code: 01BENS MEDICARE BENEFIT - CONVERSION Liability Acct: 0000-000-0000-000-00-00000
Category Code: ME MEDICARE Expense Acct: 0000-000-0000-000-00-00000
Benefit Statement Code:
Vendor: 000000 remit: 00
Status: Inactive Separate Check: No

Annual Flat Amount: W2 Box: Applies to:
BaseBucket: % W2 Description: 1099-R Box:
Over Annual Calc: Period Annualized 1099-R Description: Applies to:
Over Annual Amt:
Annual Maximum Amt:
Employee Contr:
Employer Contr:

Holdover Method: 1 Take Available Amount
Employer% is Only Reportable Benefit: No

Paycheck Order: Employee Employer
Always take Benefit: Yes Pretax: No Tier 1 % 50.0000 50.0000
Allow Override: No Bond: No Tier 2 % 100.0000
EE Chgs Allowed: No Tier 3 % 100.0000
Over 50K Life Ins.: No Tier 4 % 100.0000
W2 pension Ind.: No Tier 5 % 100.0000
Rhode Island Family Court: No
Massachusetts Family Court: No

Periods to take:

Apply to Base Buckets:

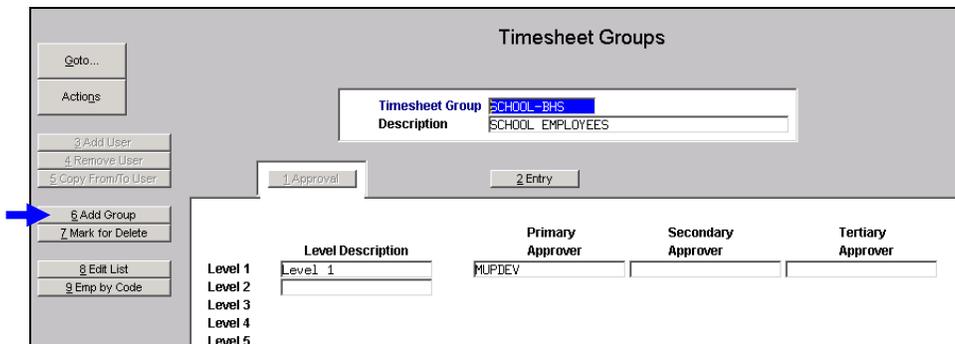
Federal Tax Wages	No	OJI/111F wages	No
Medicare Wages	No	Clothing non taxable	No
State Taxable Wages	No	car allowance	No
Retirement Wages	No	Clothing taxable	No
Total Wages	No	Senior Tax Gross Pay	No
Workers Comp	No	Senior Tax Net	No
Federal Taxes	No	Roth Contribution	No
State Taxes	No		
Reportable Health Care Co	No		
TAXABLE BENEFITS	No		
Pension Plan Flag	No		
Deferred Comp Wages	No		
EFT Deductions	No		

[ADM-AUC-HR-9620]

9.2. Timesheet Groups

9.2.1. Add Timesheet Group

When adding Timesheet groups, the **sub group** is no longer required. It is now an optional entry. To add a timesheet group, select **Human Resources** ▶ **Tables** ▶ **Timesheet Groups**. Click on .



Level Description	Primary Approver	Secondary Approver	Tertiary Approver
Level 1	MUPDEV		
Level 2			
Level 3			
Level 4			
Level 5			



Figure 15 Before

Figure 16 After

[ADM-AUC-HR-9513]

10. INTERFACES/IMPORTS

10.1. ICMA Export

The ICMA export file was updated to provide the source of ROTH (After Tax) IRA 457 plan entries. The updated specification shows that a code of RT is now required in positions 15-16 of record #2.

15 – 16	Source Code for Contribution Type	Alpha 401 or RHS value: Employer = ER Mandatory Pre-Tax = EE Voluntary Pre-Tax = EE Mandatory After-Tax = EE Voluntary After-Tax = EV Roth = RT 457 value: Pre-Tax = Blank Roth (After-Tax) = RT	2
---------	-----------------------------------	---	---

To run the report, select Interfaces/Imports▶ICMA Export and fill in the required fields as shown below.

ROTH contributions will be designated as such in the data file submitted to ICMA with the **RT** as shown in the excerpt below:

```
300668020002 RT0487438660000020000 3
705258010001 066002064 3
705258010002 0660020640000367450 03 08202015C 3
```

```
-----
Selection Legend:
-----
Warrant: 150820
Category: ROTH
Loan Category: 401A
File: C:\ADMDHOME\AUC\CONVERT\ICMA.TXT
```

[ADM-AUC-HR-9625]



11. SITE SPECIFIC

11.1. CT TRB Reporting

This only applies to Connecticut sites.



Users running the CT TRB Reporting step were seeing an “Invalid Keyword: LKUP” message before the report was produced. This was corrected.

[ADM-AUC-SY-7965]

12. HELP REFERENCE LIBRARY

12.1. New or Updated Documentation

The following new or updated documentation was added to the Help Reference Library.

- OTHER I forgot to print my reports...