Unique Payroll Solutions

PAYDAY INC

25 YEARS
PAYDAY INC · ESTABLISHED 1985

Evolution Training Manual

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Evolution Install on your Desktop

1. Go to: http://www.paydayinc.com/
   a. Click the "Clients" button at the top of the page
   b. Click the "Secure Transfer / Download Files" bullet point
   c. Click the "Download Files" option – this link opens
      http://www.paydayinc.com/clientdownloads.php
   d. Click the "Evolution Install" bullet point
   e. Select each of the available hyperlinks
      i. Evolution Training Manual
      ii. EvoRMT.zip
      iii. RemoteHelpInstaller.zip

If a File Download box comes up, select Save
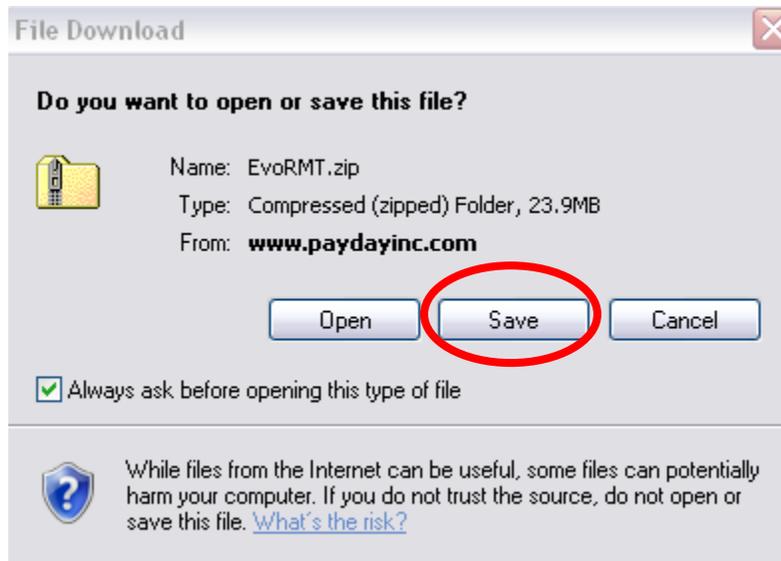
Select to save in your Desktop. The File name, and Save as type
will fill in correctly automatically. Select Save
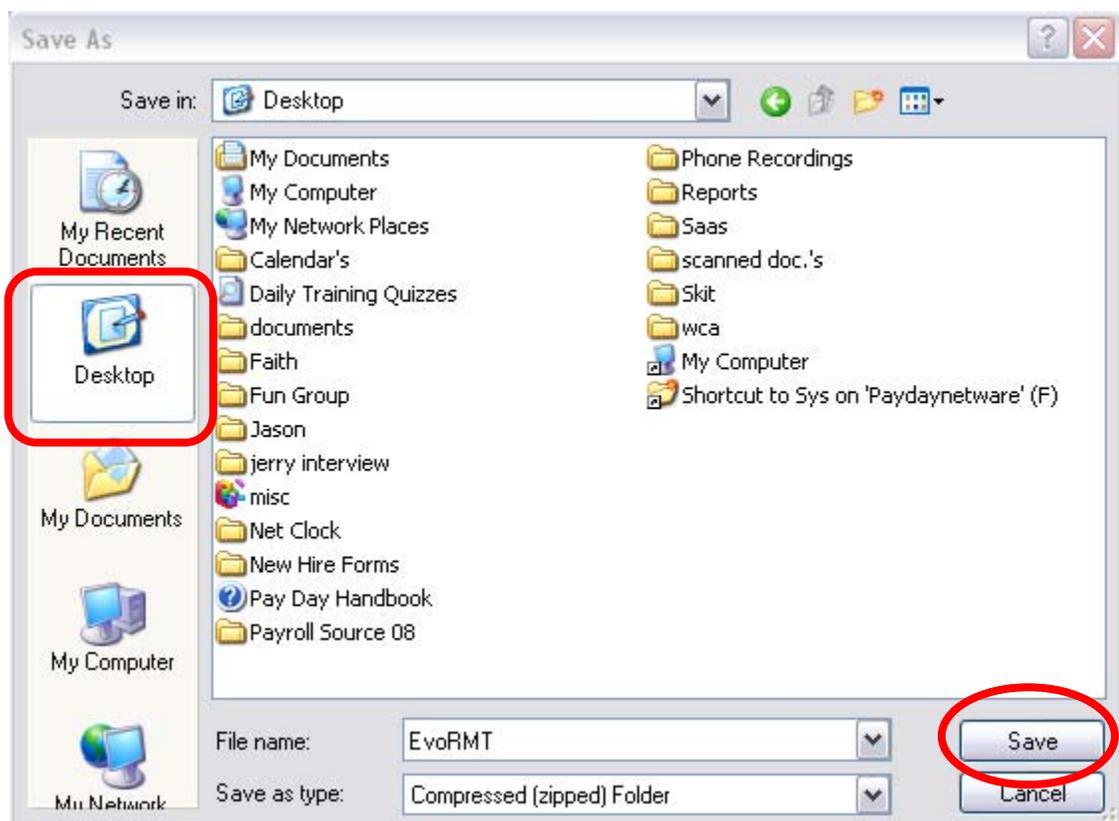
The file will download. When it is complete you will see a folder like the one below on your desktop.
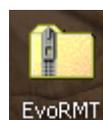
	Double Click on the folder on your desktop.		Double Click on the EvoRMT Icon that is in the folder.

The File Download – Security Warning box will come up. Select Run

The Evolution Software Install will run leaving you with an Evolution Icon on your desk top.

You will double click on the Evolution Icon to access Evolution. The login screen will come up when you do this.

Your username and password will be provided to you by Pay Day.

The Server ID will be populated with "evolution.paydayinc.com"

The connection type is your internet connection – typically T1 (this will default)

If you click the Settings button, you will find the port used for communication (default is port 443); this port setting is relevant to your IT department

Repeat the above instructions for the Evolution Help Installer (RemoteHelpInstaller.zip)

Print Key – Evolution v4.0 Print Screen

1. Print Key is an excellent add-on. It is activated when you press the Print Screen Key and allows you to capture the entire screen or any portion of it. You can then make changes to the screen capture and save in a variety of formats including .gif, .bmp, .jpeg, .emf and .wmf. You can also swap colors, convert to grayscale or black and white, change picture size and send to the printer.
2. Below are instructions on how to install "Print Key" on your desktop in order to print selected screens directly to your printer.
3. Go to http://www.paydayinc.com/ .
   a. Click the "Clients" button at the top of the page
   b. Click the "Secure Transfer / Download Files" bullet point
   c. Click the "Download Files" option – this link opens
      http://www.paydayinc.com/clientdownloads.php
   d. Click the "Tools" bullet point
   e. Click the "Print Screen" bullet point
   f. Select the available hyperlink, "PrintKey5.exe"

Your Username and Password

Username _____

Password _____

Evolution Password Requirements

1. Evolution has an improved security feature that has been added since the upgrade to the latest version in Sept. 2010
2. Passwords that are created for Evolution must now meet the below requirements. You must have at least 3 of the 4 below options in your password.
    a. Lowercase letters: a, b, c…z
    b. Uppercase letters: A, B, C…Z
    c. Numbers: 0, 1, 2…9
    d. Special characters: ! @ # % ^ & * ( ) _ - = + { } [ ] | \ : ; ” ’ < , >
        i. The $ (dollar Sign) is **Not** included in the special characters

Payday Contact List

Main number 505-255-5433   5011 Indian School Rd. NE   Albuquerque, NM 87110
Fax number 505-962-2758   Secondary Fax 505-213-0177   after hrs 505-260-7627

	Extension	Email

Operations
- Client Service Manager
  - Liz Mink, CPP — x327 — liz@paydayinc.com
  - Platinum Service Team
    - Cindi Pohl – Team Lead — x310 — cindi@paydayinc.com
      - Donna Sellers, CPP — x309 — donna@paydayinc.com
  - Client Service Supervisor
    - Myra Armstrong — x322 — myra@paydayinc.com
    - Customer Service Representatives (CSR)
      - Sherry Clees — x326 — sherry@paydayinc.com
      - Dolores Griego — x369 — dolores@paydayinc.com
      - Dena Parmeter — x307 — dena@paydayinc.com
      - Sarah Ruiz — x364 — sarah@paydayinc.com
      - Michelle Sena — x333 — michelle@paydayinc.com
      - Mandy Vialpando — x367 — mandy@paydayinc.com
      - April Wiebenga — x315 — april@paydayinc.com
    - Payroll Checks/ Reports Packaging
      - Monique Archuleta — x350 — monique@paydayinc.com
      - Janice Lujan — x328 — janice@paydayinc.com
    - Couriers
      - Julio Deleon
      - Juan Vialpando
    - 401(k) Benefits Reporting
      - Becky Hoover — x303 — becky@paydayinc.com
- Receptionist
  - Lina Alvarez — x301 — lina@paydayinc.com
    - Back-up
      - Becky Hoover — x303 — becky@paydayinc.com
      - Kathy Wagy — x363 — kathy@paydayinc.com

Extension

Tax/ Accounting
- Finance Manager
  - Leanne Rich, CPP   x320   leanne@paydayinc.com
    - Tax
      - Elvira Romero   x336   elvira@paydayinc.com
      - Kathy Wagy   x363   kathy@paydayinc.com
    - Accounting Department
      - Natalia Beinenson   x324   natalia@paydayinc.com
      - Mireya Bejarano   x313   mireya@paydayinc.com

Implementation
- Business Development Manager
  - Russ Loidolt   x354   russ@paydayinc.com
    - Customer Service Coordinators
      - Esther Vialpando   x329   esther@paydayinc.com
      - Jerry Galindro   x330   jerry@paydayinc.com

Benefit Offerings   **benefits@paydayinc.com**
  - Paula Sherwood   x331   paula@paydayinc.com
  - Tana Trujillo   x323   tana@paydayinc.com
  - Tiffany Haworth   x353   tiffany@paydayinc.com
  - Delphina Inez   x359   delphina@paydayinc.com

Owners
  - Andy Siegel   x311   asiegel@swcp.com
    - Administrative Assistant
      - Pat Peterman   x321   pat@paydayinc.com

  - Sylvana Siegel   x304   sylvana@paydayinc.com
    - Project Coordinator
      - Maria Romero   x332   maria@paydayinc.com

Client Control Considerations

1. Ensuring that only authorized and properly trained personnel are allowed logical access to Payday, Inc. systems, fax input worksheets and coversheets.

2. Establishing proper controls over the use of user ids and passwords that are used to access and enter payroll information on Evolution.

3. Review of the annually prepared payroll processing schedule and notifying Payday, Inc. of any changes in a timely manner.

4. The preparation of worksheets, faxes and control totals that are sent to Payday, Inc..

5. Notifying Payday, Inc. of changes in the authorized contacts list.

6. Accuracy of the data entry when using remote client entry in Evolution.

7. Reviewing the Pre-Processing Payroll Register report before submitting on a timely basis to ensure that all payroll information has been recorded completely and accurately.

8. Reviewing the reports produced by Payday, Inc. after initial account set-up. This is to ensure that employee-level and company-level information has been initially recorded completely and accurately.

9. Review of error messages that result from entering payroll data, addressing errors and resolution in a timely manner.

10. Submitting payroll data in accordance with the mutually agreed upon schedule.

11. The completeness and accuracy of client-specified deductions.

12. Submitting client-specific deduction changes to Payday, Inc. in a timely manner.

13. Establishing procedures to notify Payday, Inc. if employees report problems with checks.

14. Signing upon receipt of payroll reports, checks and vouchers.

15. Receiving and distributing checks.

16. Reconciling bank accounts used for payroll processing on a timely basis each month.

17. Retention of payroll reports and supporting documentation for the appropriate length of time to comply with all federal, state and local compliance agencies.

18. Submitting all relevant correspondence with tax agencies to Payday, Inc. promptly.

Downloading RWA Viewer from Payday Inc. Website

1. All reports will be sent electronically as an rwa file. This is a secure file that is created when your payroll is being processed. To open this file you will need to have preview.exe installed on your computer.
2. Create a new Folder on your desktop: "Reports"
3. Open an internet browser and navigate to http://www.paydayinc.com/
   a. Click the "Clients" button at the top of the page
   b. Click the "Secure Transfer / Download Files" bullet point
   c. Click the "Download Files" option – this link opens http://www.paydayinc.com/clientdownloads.php
   d. Click the "Report Viewer" bullet point
   e. Select each of the available hyperlinks
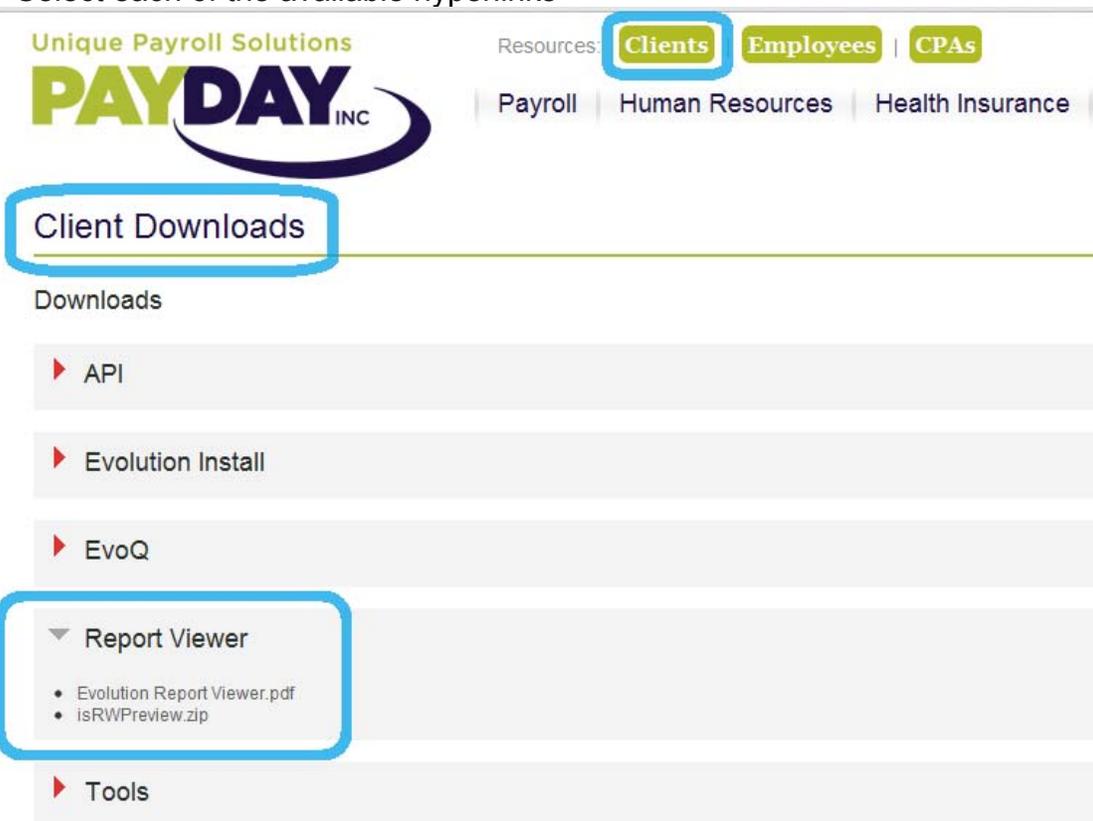
4. The File Download – Security Warning window will come up. Select Save; save it to the Reports folder
5. The "isRWPreview.exe" program is in the "isRWPreview.zip" compressed folder
6. Double-click the "isRWPreview.zip" folder to see the contents
7. Once the compressed folder is open, right-click on the "isRWPreview.exe" programe
8. Select Copy
9. Close the folder window
10. Right-click in the Reports folder; select Paste
11. Double-click the isRWPreview.exe program to open it up and allow Windows to set the file associations; once open, you may click the "X" to close it
12. When you receive your report you will want to save them to the Reports Folder.
13. Double-clicking the Report .rwa file will open the Preview.exe and the report(s)

Navigating

Top Navigational Bar

Tabs

Select the Header Column to put the information in order by the column you select

Buttons

The Browse Tab will always be where your, "list" is.

The ? will bring up a filter screen which allows you to filter the information you are seeing

1. Buttons are located on the left hand side of the screen. Some of the buttons will have a subfolder of other buttons you can choose within that button. For instance the Reports Button has subfolders run reports, set-up reports, etc.

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2. Tabs are located along the top of the screen. You can access further information within each tab by selecting each tab.

| Browse | EE Entry | Details | Address | W2 | Federal Tax | Notes | HR |
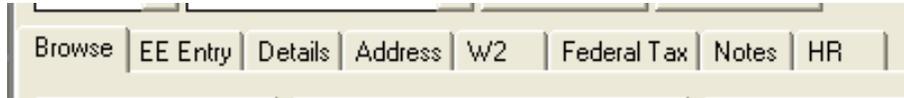
3. The Top Navigational Bar helps you navigate and perform actions within Evolution.

Back to previously viewed window   Forward to next viewed window (The drop box arrow will allow you to select from the last few places you have been.)

First Record   Prior Record   Next Record   Last Record

Create a record   Delete a record

View field audit history   Refresh data

Post Changes   Cancel Changes

Commit data changes to database on server   Abort Changes

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Changes

Entering a Change to Employee Information
On the Employee/ Employee/ EE Entry Screen

1. To Enter a change to employee information you will need to select the Employee Button.

2. Select the Employee Sub Folder

3. Select the Employee that you need to make a change on from the Browse Area

4. Select the EE Entry Tab

5. Select the Information that needs to be changed
6. Enter the change to the information
7. Select the Green Check Mark
8. Select the Yellow Sun.

Note Changes that need to be made in other areas of Evolution are basically the same. Select the information that needs to be updated.   Make the change… Save.

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Creating a New Employee

1. Select Employee on the side bar. Select Employee from the Subfolder that appears.
2. Open the Company you want to add a new employee to.
3. This action opens the company and displays its employees in the employees list. (EE list is in the Browse Tab)
4. Click the Create New Record [icon] button on the upper tool bar to create a new record for the new employee
5. A new employee will be created and it will be displayed in the EE Entry tab.
6. Once this has occurred, you can begin to key information about the employee. All the fields highlighted in dark red **must be entered**-This information is sufficient enough to create the new employee and pay him or her.
7. SSN is required to be entered first.
8. Starting at the upper left of your page use your Tab Key on your Keyboard to enter all of the employee's information.

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9. When entering the employee's Division, Branch, Department, or Team you must select the DBDT button. This will allow you to select the DBDT
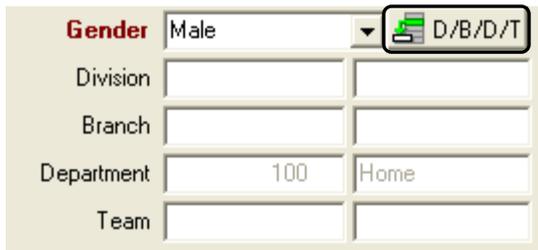
10. If the employee that you are entering is salaried you will enter the salary based on the Pay Frequency. This is what they will actually be paid on their check per pay period (not the employee's annual salary). You will leave the Rate Number as 1 and the Rate Amount as 0.00. If they employee's is hourly you will enter the employee's pay rate in the Rate Amount. You will leave the Rate number as 1.

Pay Frequency

Bi-Weekly

Salary Amount	Average Hours
1,500.00	0.00

Rate Number	Standard Hours
1	

Rate Amount	Pay Grade
0.00	

Note: if you want the salary to auto populate with hours in the payroll area you will enter the hours in the Standard Hours Box.

11. More information about the employee can be added by using the following tabs:
- Details tab
- Address tab
- W2 tab
- Federal Tax tab
- Notes tab
- HR tab

12. Remember to save changes by selecting the green check [✔] and yellow sun [☀] when applicable on the toolbar!

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Entering your Employee's
Using Employee Quick Entry

1. Select the Employee Button
2. Select the Employee Quick Entry Subfolder
3. Select the Employee Quick Entry Tab

   Browse | EE Quick Entry |

4. Select the Green Plus Sign at the top of the page.

5. Enter the employee's information
   a. All required information is **Bolded in Red**
6. To save the employee select the Green Check Mark.
7. Then select the Yellow Sun.

Menu items:
- Employee
- **Employee Quick Entry**
- Pay rate info
- States
- Locals
- Scheduled E/Ds
- Time Off Accrual
- Shifts
- Auto Labor Distribution
- Pension Fund Splits
- Piece Work
- Additional info

Sidebar:
- Employee
- HR M
- Aux P
- Payrol
- Repor
- Opera
- Tax re
- Misc

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Terminating an Existing Employee

Note: When terminating an employee you should consider if the employee needs to be paid again before actually terminating the employee in the system. The system creates checks in the Batch area based on the employee's that are active in the system. If you terminate the employee before running your payroll, and you still need to pay this employee you will have to manually create a check to pay this person.

1. Select Employee on the side bar. Select Employee from the Task List items that appear.
2. Open the Company you want to add a new employee to.
3. This action opens the company and displays its employees in the employees list. (Browse Tab)
4. From the list of employee's select the employee that needs to be terminated. (You can either double click on the employee's name or select the employee and then the EE Entry Tab to enter the employee's information.)
5. Enter the termination date, and change the status to one of the available status listings. As well as if the employee can be rehired.
6. Any status that is not active will cause the employee to not automatically come into the payroll when auto creating checks.

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Rehiring an Employee

If you start entering a new employee, and the system auto populates the Employee's information, this employee is already in the system. You should select the red [×]   Now you should go through the steps to rehire the employee.

1. Select the Employee Button, then the Employee Subfolder
2. Select the filter beside the employee list [?] clear list so that you are seeing all employee's

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3. Select the employee that you want to rehire (either double click on the employee's name or select the employee and then click on the EE Entry Tab)
4. Change the Current Hire Date to reflect the new hire date. Change the Original Hire Date to reflect the hire date that was this person's original hire date. Change the status to Active

5. Depending on your company you may have other areas that will need to be updated.
    a. Address
    b. Pay-rate
    c. Scheduled E/D's
    d. Direct Deposit
    e. Etc.

Details Tab

1. The Details Tab in Evolution is located in the Employee Button Employee Subfolder. This area holds extra information about the employee.
2. Payday sends the New Hire Report for most of our Clients unless specifically asked to not perform this service. You can see the status of the New Hire report in the upper left hand corner of the Details Tab.

3. Keep track of your employee's Position. The Effective Date of that employee starting in that Position. Also keep track of if the employee's Position Status.

4. To build the list that is available in the drop down box under Position right click over the position column. Select the Edit Lookup Table from the box.

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5. This will direct you to the area in Evolution where you can build the list available in this drop down box.

6. By selecting the Green Plus Sign at the top of the screen you can add a Description. Enter the Description at the bottom of the page. Save by selecting the Green Check Mark and then the Yellow Sun. When done entering the Descriptions that you would like to have available hit the back arrow button at the top of the screen to have Evolution navigate you back to the Employee/Employee/Details Tab.

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7. The YTD Button allows you to pull the employee's Year To Date information. By clicking on the YTD Button [YTD (F3)] Evolution will pull the employee's information.

Description	Hours	Amount		Description	Hours	Amount		Description	Amount
► Regular Earnings		100		► Net Pay		91.58		► ER FUI	0.88
Test Memo		10						ER Medicare	1.60
								ER OASDI	6.82
								Medicare	1.60
								NM-SUI	2.20
								OASDI	6.82

Earnings   Deductions   Taxes

| 0 | 110 | | 0 | 91.58 | | 19.92 |

[✗ Close]   [2008 ⬍]   [✓ Apply]

8. Shortcut Keys allow you to jump to a specific area of Evolution. The Details Tab has two shortcut keys.

a. [EE Scheduled ED's] This shortcut key will allow you to jump to the Employees Scheduled E/D's area of Evolution.

b. [Apply for New Position] This shortcut key will allow you to access the Employee HR area where you can document an existing employee applying for a new position. (This is only possibly if you have the HR Module)

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Address Tab

1. In the Address Tab the required Red Bold areas default with what is entered in the EE Entry Tab.
2. The Alternate Address area allows you to keep more than one address in the system.
3. This area also allows space for extra phone numbers

4. Employee's that are having their vouchers emailed to them must have Direct Deposit that is **not in pre-note** on their account.
   a. Enter the employee's email address (this is where the voucher will be emailed) enter the VMR Password (this will be what the employee must enter to be able to view the check voucher ~ this is usually the last four digits of the employee's social)
   b. Make sure that you let your CSR know that you set up an employee to receive their check through email. The CSR has a final step that they must do to make this process work properly.
   c. **Note!!! If an employee needs to receive a paper check you will need to notify your CSR so that they can make a change in Evolution so that this will happen.**
5. If you are using our Self Serve service you will enter the employee's User Name and Password in the Self Serve box.

W-2 Tab

1. The W-2 Tab allows you to control information for the W-2. This area is used mostly to control if you are paying 1099 employees through Evolution.

   a. If paying a 1099 employee through Evolution you must change the form type to 1099 instead of W-2. You must also change the 1099 or Employee box to show 1099.
   b. It also important to check the Employee/Scheduled E/D area on 1099's to make sure that there is no Worker's Comp codes on the employee. (Note: this only affects NM employers)
   c. 1099 employees should only be paid under a code that is specific to 1099 employees. If you are paying 1099 employees through Evolution you will need to have a special Earnings Code set up to pay them under in the payroll.

2. The other area used in the W-2 area is the First Name, Middle Name, Last Name, and Name Suffix. These Columns allow you to override what will show on the W-2. Normally the system takes the information from the Employee/EE Entry area, but when these columns are filled out the system will use what is enter here over what is in the Employee/EE Entry area.

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Federal Tax Tab

1. To take additional Federal taxes on an employee who has designated to do so, on their W-4 you will need to go to the Federal Tax Tab in the Employee/Employee area of Evolution.

2. Once in this tab you will need to change the Override Fed Tax Type. You will then put in the amount or percentage in the Override Fed Tax Value.

3. Available options in the Override Fed Tax Type drop box and what they mean:

None ~ no additional taxes will be taken
Regular Amount ~ this will tell the system that this is the only taxes to be taken for federal. This will override the employee withholding status on the EE Entry Tab
Regular Percent ~ this will tell the system to only take this percentage for the Federal Taxes. This will override the employee withholding status on the EE Entry Tab.
Additional Amount ~ this will take the amount entered as well as what the system calculates the EE's withholding to be based on their withholding status.
Additional Percent ~ this will take this percentage as well as what the system calculates the EE's withholding to be based on the withholding status.

4. If you have an employee who enters Exempt on the W-4 you will need to contact your CSR to have them set this up on your Employee.

Notes Tab

1. The notes area in the Employee/ Employee/ Notes Tab: will allow you to keep notes on your employee's.
   a. The Payroll Notes will show in the payroll as a reminder of something that needs to be done for this employee in the payroll.
   b. The General Notes gives you a place to keep notes on this employee. These notes will only show in this area.

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HR Tab

1. The HR Tab allows you to keep basic HR information on your employee.
2. You can load a picture
    a. The picture must be a bitmap format that does not exceed 50 KB
    b. Select the Load button and navigate to where the picture is located on your computer or server.
3. The other areas on this tab that have drop boxes are customizable
    a. Right clicking in the box that you would like to customize.
    b. Select Edit Look-up Table
    c. This takes you to the area of Evolution that you can build the list for this box.
    d. Once you have built your list using the plus sign to add more than one entry hit the back button to get back to the Employee/ Employee/ HR Tab
    e. The list you just built should now be available.

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Tracking Workers Comp in Evolution

1. There are two ways that Evolution allows tracking of Workers Comp.
   a. The first option is from the Employee/ Employee/ EE Entry Tab.
   b. Tracking can be done from the drop down box Default WC.

   c. The second option is for the workers comp code to be attach to a DBDT. This would allow that when you select an employee's home department in the Employee/Employee/ EE Entry area that the Default WC would be selected based on the home department that was selected.

2. Workers Comp can also be changed on the check lines of a payroll. This allows tracking if an employee works in different jobs that need to be coded under different workers comp codes.

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Life Insurance over $50K

1. Group Term Life Insurance can be tracked in the Evolution System so that it does not need to be entered in all at the end of the year.

2. To enter this is you will need to have Payday set up a code in the system. This code will need to be set up in the Scheduled E/D's area so that it will come into the check.

3. You will also need to make sure that the employee's Date of Birth is entered correctly in the Employee/ Employee/ EE Entry Tab.

In the Details Tab you will enter the Group Term Life Poli

1. The Employee Pay rate area of Evolution allows you to update and maintain your employee's pay information.

2. For employee's that are hourly the rate entered in the Employee/ EE Entry area of Evolution will default into this area as the Primary Rate. To update the hourly rate you would change the rate in the Rate Amount Field and save.

3. If an employee needs to have more than one hourly rate; select the plus sign at the top of the page. This will give you another line to add a separate pay rate. The rate number will be the next available number. Enter the rate amount and then save.

4. Pay rates can have a DBDT attached to them. This will cause the system to connect the pay rate with the attached department. If an employee is paid a different rate when working in a different department this would work in the system for this employee.
    a. Highlight the pay rate that needs to have a department attached to it.
    b. Select the DBDT Icon, and select the DBDT that you want to attach.

5. Employee's that are salary will have the salary amount that was entered in the Employee/EE Entry are defaulted into this area. The system calculates based on what you entered what the annual salary is.

Salary Amount	Standard Hours
1,477.88	

Annualized Salary

Pay Frequency
Bi-Weekly ▼

Average Hours	Calculated Annual Salary
0.00	38,424.88

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1. The Employee/ States area of Evolution will allow you to change the State on an employee
   a. First you will need to make sure that the state is setup and available
   b. Go to Employee/ States
   c. Select the employee that you need to change the state on
   d. Select the plus sign from the details tab.

   e. In the State, SDI, and SUI drop boxes select the State that the employee is being changed to.

   f. Select the Marital Status for the new state. Enter the Withholding Allowances Amount for the new state as well.
   g. Save with the green check mark and yellow sun.
   h. Change the Home State at the top of the Details Tab.

   i. To affect an employee's state withholding go to Employee Side Button/States Sub-Folder/Tax Overrides Tab. You will be able to affect the employee's state withholding by selecting the Override State Tax Type. Enter the amount or percentage in the override state tax value.

Employee/Scheduled E/Ds

1. The Scheduled E/D's area of Evolution is used for Earnings and Deductions that you want to come into the payroll automatically when starting the payroll.
2. When in the Employee/Scheduled E/D's/ Browse Tab you will be viewing your company(s) on the left side of the page and the list of employee's on the right side of the page. Select an Employee either by double clicking on the Employee's name or by highlighting the employee's name then select Browse Scheduled E/D's tab.
   a. From the Browse Scheduled E/D's tab you can view the Scheduled E/D's that are already set up for this employee.
   b. If you need to edit an already created E/D select the E/D then select the Details 1 tab or any other tab that may hold information about that E/D.
   c. Change the information that needed to be updated and save
   d. Note to stop a deduction enter an end date that is before the beginning date for the pay period.
3. To create a new Scheduled E/D select the green plus sign at the top of the screen. This will automatically direct you to the Details 1 tab.
   a. Most Scheduled E/D codes are specific to your company needs so that you should be able to select the E/D Code, enter the amount or percentage that should be paid or taken, and then save.
   b. It is important to note that each employee should only have an E/D code set up on them once. The system will not allow a code to be active on an employee more than once.
   c. If you find that you are in need of another E/D code on your company setup please let your CSR know. We can add more E/D codes to your set up for your use.
   d. Some codes may require more information to be filled out in the Details 2 tab. Codes that require a target to be setup will require that the information is setup in the Detail's 2 tab. Under Target Action select from the drop down box

~Do not reset Balance but Leave Line – will leave the balance in Evolution and will leave the line on the ee's check.
~Do Not Reset Balance and Remove Line- will leave the balance in Evolution and will remove the line on the ee's check once the target has been met.

Enter a Target Amount. The system will take the amount that was set in the Detail's 1 tab for the deduction and will update the Balance Taken until the total Target Amount has been taken. Then the system will automatically put an end date in the Detail's 1 to stop the code.

4. All Child Supports, Garnishments, and Liens need to be set up in the system by Payday. Contact your CSR to send them the information to be set up.

Future Dating in Scheduled E/D's

1. Evolution will allow you to date a Scheduled E/D to start or stop in the future.
2. Future dating is done in the Scheduled E/D Details 1 Tab
   a. The Effective Start Date is the date that the system looks at for starting a Scheduled E/D
   b. The Effective End Date is the date that the system looks at for stopping a Scheduled E/D

3. When Future dating you must think about what pay period the date that you want the Scheduled E/D to start or stop in.
   a. The Pay Period is the time frame that you are paying for on a specific check date. The Beginning and End Date show in the Batch Area when you are running payroll.

   b. As long as the date that you enter in the Scheduled E/D Detail 1 (Effective Date or End Date) fall within the Period Begin Date and Period End Date that Scheduled E/D will either start or stop for that Pay Date.

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Mass Updates in the Scheduled E/D Area

1. In the Employee Scheduled E/D Area of Evolution select an employee from the Browse Tab who needs to have an E/D updated.
2. Select the Browse Scheduled E/D's Tab
3. Select the E/D that needs to be updated
4. Right click and select the Action that you would like to perform.
   a. Copy
      i. Select the Employee's that you would like to copy this E/D onto.
      ii. Say Yes to overwrite existing enteries
      iii. This will only work if the EE's that are selected do not have this E/D setup on them
      iv. This is best used when you are setting up a completely new E/D
   b. Update E/D's
      i. Select the Employee's that you would like to have the E/D selected updated on them as well.
      ii. This is best used on E/D's that already are setup on Employee's that need to be updated.
   c. Update Fields
      i. This function allows you to update the E/D that you are on right now. This will give you a Choose fields to update pop up screen. Select the fields that you want to update.
      ii. Select the update button at the bottom of the box.
      iii. Select the Employee's that you would like to update these fields on.
         1. If you are updating on more than one Employee select the Ctrl key on your keyboard to select more than one name.
         2. If you are selecting all select the first name in the list hold down your Shift key on your keyboard then select the last name in the list. This will select all of the names.
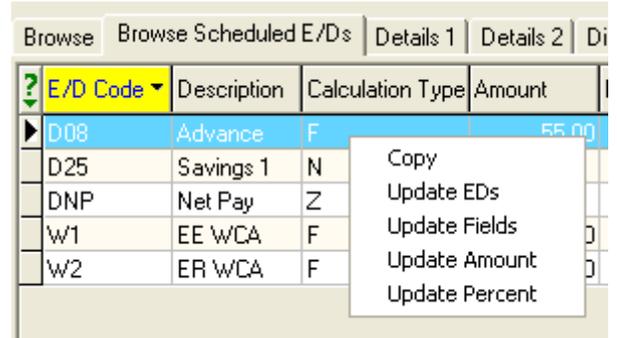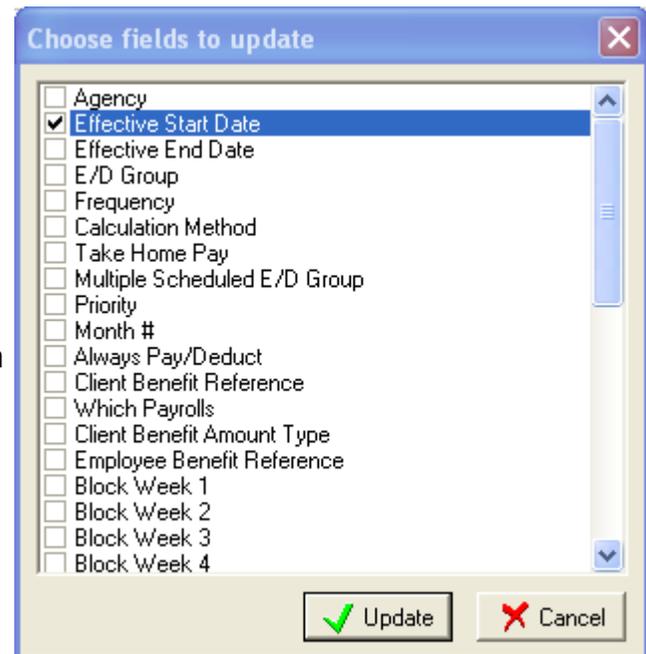
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3. Select the Copy Selected Button
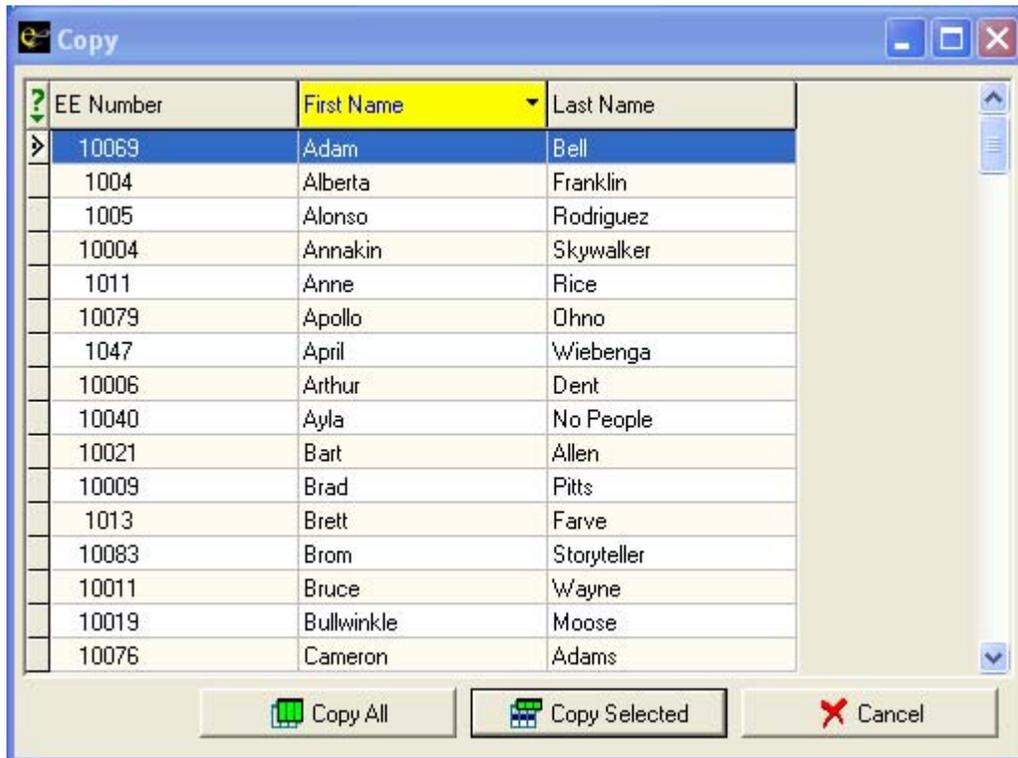
iv. A message box will pop up Select Yes
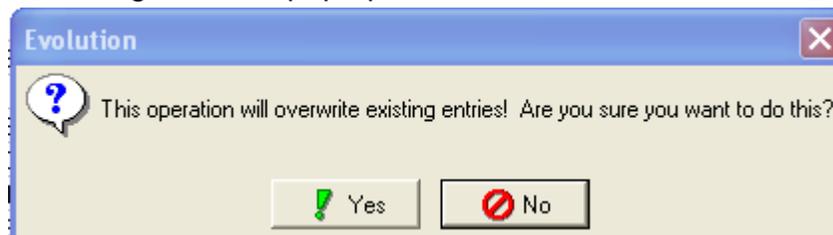
d. Update Amount/ Percentage
    i.   This will give you a pop up box that will allow you to change the amount or percentage on this E/D.
    ii. Enter the new amount of percentage
    iii. Select the update button.
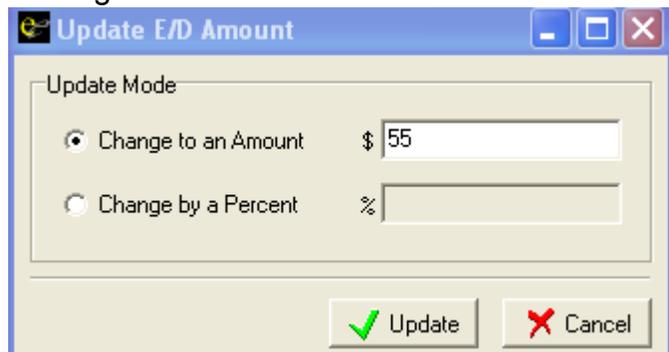
    iv. You will be prompted to select the Employee's that need to be updated.
    v.   Select Employee's
    vi. Select copy Selected
    vii. Say yes to the message to overwrite existing entries.

Client Benefits

1. The Client Benefits area allows for a Scheduled E/D to be updated to affect everyone who has that specific setup of that Scheduled E/D
2. Go to the Client Button and then the Benefits Subfolder.
3. From the Browse Tab the Benefits that have been created can be seen.
4. To add a new Benefit hit the Green plus sign at the top of the page. Fill out the Details Tab and % and Amounts Tab
5. To update an already created Benefit select the Benefit from the right column. Then select the Details Tab.
6. From the Details Tab you can update the information for the Benefit.
7. There is further information that can be updated for each level of the Benefit under the % and Amounts Tab.

8. By selecting the Rate Description you can update the Amounts that will Globally affect everyone who has that Rate set up on the Employee File.
9. To add a new Rate Description select the plus at the lower right part of the page.
10. In the Employee/ Scheduled E/D's you would follow normal procedure. Select the green plus at the top of the page to create the scheduled E/D.
11. From the Details 1 Tab select the E/D Code.
12. Select the Benefit Reference from the middle of the page
13. Select the Benefit Amount Type.
14. The Calculation Method and Amount will gray out because you will control this from the Client Benefit area.

15. If you have the HR Module portion of Evolution you can control the Benefit Reference by selecting from the drop down box with the plus sign beside it. This are allows you to reference the HR Module information, which is connected to the Client Benefit Area

1. Click Employee and then select Scheduled E/D's
2. The Browse tab will be displayed.
3. Select a company in the left browse grid and select an employee in the right browse grid.
4. Once the employee is selected, click the Direct Deposit tab.
5. In the Direct Deposit tab, create a new bank account record for the employee by clicking the plus button.

6. Enter a valid ABA or Transit Number
7. Type a valid Bank Account Number.
8. Select an Account Type.
9. Select whether the direct deposit is In Pre-note. Remember: When pre-noting a payroll, it takes 10 working days for the bank before direct deposits take effect. Weekly payroll clients could wait two payrolls and biweekly could wait one to two payrolls.
   Remember to save changes by selecting the green check [✓] or yellow sun [☀] when applicable on the toolbar!
10. Once you have set up the bank account for the employee, you need to set up a scheduled E/D for the employee.
11. Click on the Browse Scheduled E/D's Tab. Then click the plus sign (this will take you to the Details 1 Tab.)
12. Select the E/D Code from the drop down box at the top of the page. If the Direct Deposit is going to be for the entire Net Check Select DNP as the E/D Code.
13. Select EE Direct Deposit drop down box (select the correct account)
14. **Select YES under the Deduct Whole Check**.
15. To "remove" a direct deposit permanently, you should go into the Scheduled E/D's and enter an effective end date. The information will be retained in the system, but the direct deposit will stop.

Direct Deposit
At a Glance
Creating Direct Deposit

1. Employee Button
2. Scheduled E/D's
3. Select Employee the Direct Deposit need to be added to.
4. Select Direct Deposit Tab
5. Click green plus sign at middle right of pg.
6. Enter account information
7. Select green check mark & yellow sun.
8. Select Browse Scheduled E/D's
9. Click green plus sign (create new record)
10. Select Direct Deposit Deduction Code
11. Select EE Direct Deposit drop down box (select the account)
12. Select Yes under Deduct Whole Check
13. Save by selecting green check mark & yellow sun.

Creating Multiple Account Direct Deposit

1. Employee Button
2. Scheduled E/D's
3. Select Employee the Direct Deposit need to be added to.
4. Select Direct Deposit Tab
5. Click green plus sign at middle right of pg.
6. Enter account information
7. Select green check mark & yellow sun.
8. Select Browse Scheduled E/D's
9. Click green plus sign (create new record)
10. Select Direct Deposit Deduction Code
11. Select EE Direct Deposit drop down box (select the account)
12. Select Yes under Deduct Whole Check
13. Save by selecting green check mark & yellow sun.
14. Select Direct Deposit Tab
15. Click green plus sign at middle right of pg.
16. Enter account information
17. Select green check mark & yellow sun
18. Select Browse Scheduled E/D's
19. Click green plus sign (create a new record)
20. Select direct deposit deduction code (cannot be the same code as the other direct deposit account)
21. Select EE Direct Deposit drop down box (select account)
22. Select either fixed or % under calculation method
23. Enter either amount or % to be put in the account under amount or %
24. Save by selecting green check mark and yellow sun.

Employee/ Time Off Accruals

1. The Employee Time Off Accural area of Evolution allows you to maintain your Employee's TOA's.
2. The TOA area can be set up to accommodate many types of plans. It can facilitate balance only plans as well as accruals. We can also have maximum's and roll over plans.
3. Payday can set up your company's TOA's to automatically create on employee's or it can be set up where you must create the TOA line for it to start to accrue.
4. Once the type line has been created depending on your company's setup the system will take care of the accruals.
5. By entering the employee's used Time Off in the Payroll the system can deduct the used from the accrued to show a remaining balance.

6. If you need to make an adjustment to an employee's balance you will have to adjust the Current Accrued amount or the Current Used Amount.
7. To view the history of a TOA highlight the accrual at the top of the page and then select the Show TOA History Button on the right part of the page. This will show you the detail for the dates selected.

Employee/ Auto Labor Distribution

1. Auto Labor Distribution is an area in Evolution that will allow you to Distribute an Employee's wages. It is important that this is going to be the break out for that employee's wages every time, and that 100% of the wages are broken out.
2. If you do not already have an E/D Group set up for Auto Labor Distribution you will need to contact your CSR to get this set up.
3. To set up on an employee Select the Employee button, then the Auto labor distribution Subfolder.
4. Select the E/D Group from the top of the page.
5. Select the Division Code
6. Enter the percentage of wages that go to this Division Code.
7. Save
8. Hit the plus sign to add another division code
9. Repeat steps until 100% of the wages have been assigned.

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Employee/ Additional Info

1. This area of Evolution gives you a place to keep any additional information on your employee's.
2. To access this area go to the Employee button then the Additional Info subfolder

3. To build the list that is available in the drop down box under Field right click over the Field then select the Edit lookup table.
4. The system will direct you to the area of Evolution where the list for this Field is kept.
5. To add to the list hit the green plus sign at the top of the page and add the information you want to be available in the Name and Value columns.
6. Hit the back button at the top of the page to be directed back to the Employee/ Additional Info area.
7. The information you have added to the list will be available for your use.

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Payroll
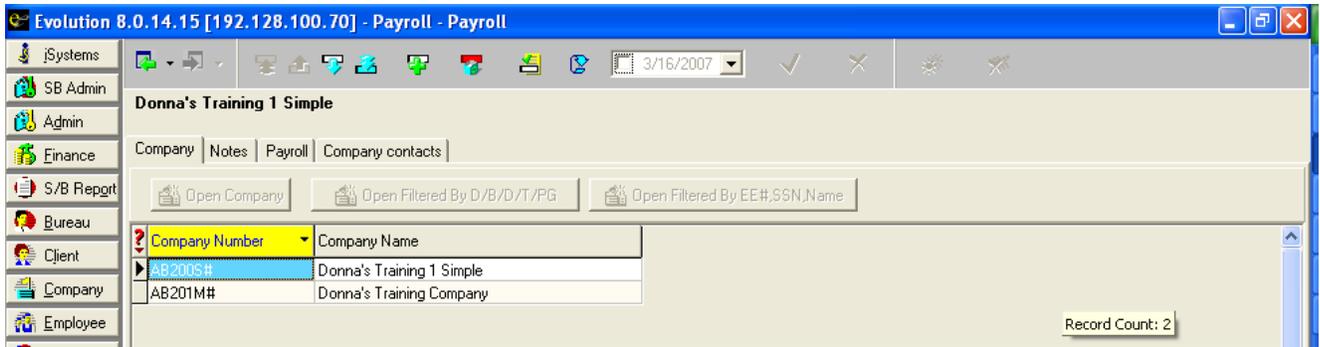
Payroll/ Company

In the Company Tab you can select your company. If you have more than one company this is where you will select the company you are working in.

Payroll/ Notes
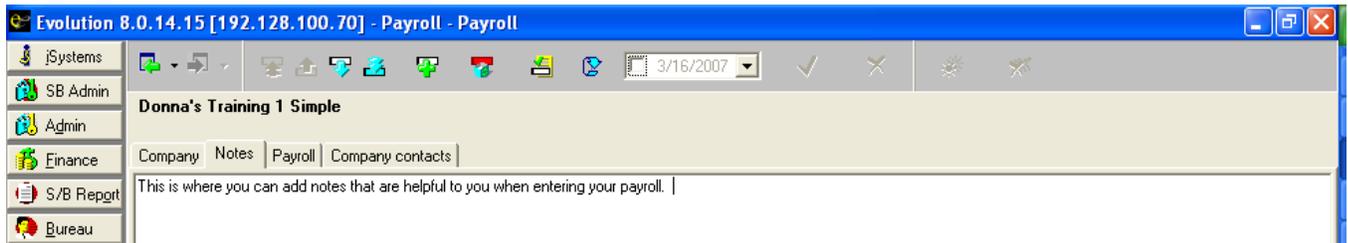
The Notes Tab is where you can have your notes that are useful to you when entering your payroll. We only ask that you leave the top line as this is for the CSR's.

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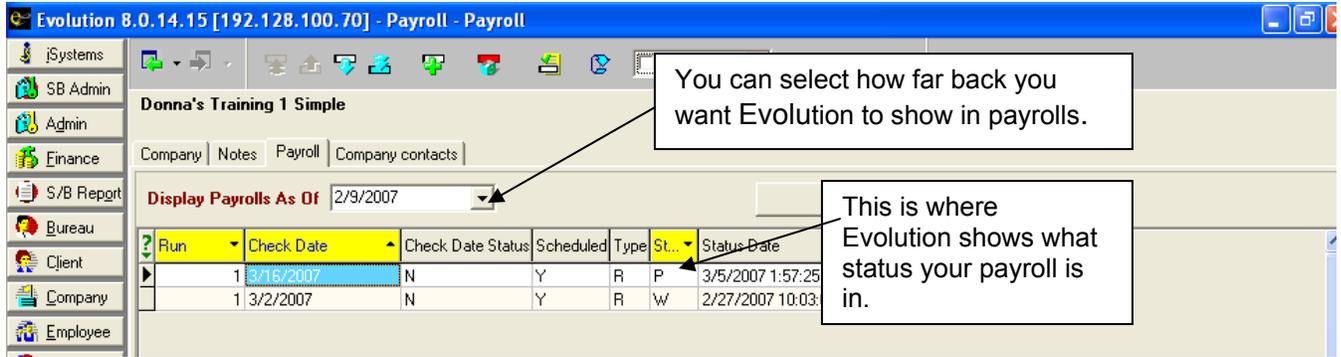
1. The Payroll Tab is where you can start your payroll. It is also where you can view the payrolls that have already been run and the status that they are in. Under status the letter tells you what status your payroll is in. W = working, H = on hold (this means you have submitted your payroll) P = means that your payroll has been processed, C = the wrap room at Pay Day has begun to work on your payroll, and Y = means the system is working on the process you have asked it to do for that payroll (sometimes if you refresh).

2. The bottom of the Payroll/ Payroll tab has some important buttons and options. The Payroll Check Comment area allows you to put a note on your employee's checks. Notes enter in this box will show on everyone check stub.
3. You want to make sure that the Block areas are not blocked! This is very important. Blocking should only be done by Payday under special circumstances.
4. To the right are the Payroll buttons. The Create Payroll Button will allow you to create your next scheduled Payroll. The SB Review button is the button you will be using when you are ready for Payday to process your payroll. You will submit your payroll Payday by selecting the SB Review button. The Submit Payroll button is used by Payday to submit your payroll for processing. The Delete Payroll button is used when wanting to delete a payroll that has not been processed. The Copy Payroll button is only available to Payday for internal use.

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1. Batches are simply containers for checks. You can have as many Batches as you would like in a payroll. Each batch will hold separate checks.

2. The Payroll Filter and Payroll Check Template are ways of filtering and paying checks with special circumstances.
3. The Frequency will default with your pay frequency. If your company has more than one pay frequency you will have to change the frequency based on what employee's are being paid. The system will only bring employee's with the frequency that is selected into the batch.
4. The Pay period Beginning and Ending date simply show the dates the employee's are being paid for. This should come up correctly based on what we have built into your schedule. If for some reason these dates are not correct please let your CSR know so that we can update your calendar.
5. The Pay Salary, Pay Standard Hours, and Load Payroll Defaults should default all saying yes.
6. The Batch Creation Options allow you some options when creating your batch of checks. By changing the Checks per EE the system will create 1 or more checks for each active employee that is brought into the system.
7. The Pay box allows you to specify what employee's are to come into this batch. This is useful if you would like to have your hourly and salary employee's in separate batches.
8. The Create Checks box will allow you to specify what types of checks should be created. Note: once the checks have been created if you add another check into the batch the check will default to regular.

9. You are also given the option of Calculate Scheduled E/D's, Selecting EE's from a list, and Create 945 checks.
    a. If you are using the Select EE's from a list you will be prompted do you want to auto create checks when you save the batch. Say yes to this and the system will give you a pop up box of all employees that have been entered into the system for your company. You can select from the list the employee's you would like to pay. To select more than one employee use the ctrl button on your key board.
10. The Create Batch button will allow you to create a Batch.
11. The Refresh ED button will refresh all E/D's in all the checks for the batch that you select.
12. The Refresh ED No Man will refresh E/D's in all checks except for Manual checks.
13. The Delete Batch will allow you to delete the batch that you have selected.

Creating an Additional Batch

1. To create an additional Batch from the Payroll/ Payroll/ Batch Area select the Create Batch button.
    a. Select or deselect the items that you would like to be effective for this batch.
    b. Select the green check mark and yellow sun. The system will prompt you with a pop up. Do you want to auto create checks? Say yes to this prompt.
    c. Once the system has created the batch select the quick entry tab or button to view the checks that you have created.

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Tabs within the Batch

| Batch | Quick Entry | Quick Entry W/Overrides | Earnings and Deductions | Taxes | Import |

1. The Batch Tab will allow you to view the batches you have created. You can select the batch that you would like to view from this tab.
2. The Quick Entry Tab allows you to quickly and easily view and enter your payroll information.
    a. The Quick Entry Tab allows you to select the E/D's that you would like to have in a grid format.
    b. This area does not show all E/D's that are on the EE's checks just the codes you choose to view.
    c. Totals are seen at the bottom of the page
    d. This area allows you to overriding Salaries and Scheduled E/D's by simply typing in the new amount from the Quick Entry Tab.
3. The Quick Entry W/ Overrides tab has the same options as the Quick Entry tab, but it also has some other override options available.
    a. Options that are available from the check lines can be accessed from here as well.
4. The Earnings and Deductions Tab gives the totals of all of the Earnings and Deductions that are in the payroll as well as a break out of what is on each employee for each E/D.
    a. By selecting a specific E/D on the left you can view the detail of what is on each EE on the right.

Agency	Add Check Line Field ▶
Job	Add E/D ▶
Line Item Date	Add E/D…
Line Item End Date	Add all E/Ds in the batch
Piece	
Rate Nbr	Remove Check Line Field ▶
Rate Of Pay	Remove E/D ▶
Shift	Restore Defaults

| atch | Quick Entry | Quick Entry W/Overrides | Earnings and Deductions | Taxes | Import | Company contacts |

☐ Display User Entries Separately   ☐ Display Totals By Check Type

E/D Code ▼	Description	Hours/Pie...	Amount	Count			?	EE Code	Employee Name	Hours/Pie...	Amount
D04	401k Contributions		125.55	2			▶	1003	Clark Mary J	80.00	1,200.00
D05	401K ER Match		62.78	2				10001	Demo1 Employee	80.00	1,200.00
D06	Catch up contributio		75.00	1				10002	Demo2 Employee	80.00	2,000.00
D21	Checking 1		100.00	1				10003	Demo3 Employee	75.00	750.00
D22	Checking 2		150.00	1				10008	Doe John F	56.00	420.00
D40	125 Medical		93.38	2				1004	Franklin Alberta K	80.00	1,580.00
D41	125 Dental		14.57	2				10009	Seinfeld Jerry	80.00	1,040.00
D42	Vision		6.01	1							
D43	FSA		38.46	1							
DNP	Net Pay		2,797.72	2							
E01	Regular Earnings	531.00	8,190.00	7							
E02	Overtime	60.00	1,470.00	4							
E07	Salary		6,375.16	3							
E10	PTO	5.00	50.00	1							
E11	Bonus		200,000.00	4							

5. The Taxes tab show the Tax Type and total on the right and then the detail for the specific tax you have highlighted will show on the right.
6. The Import Tab allows you to import a file that is in a format that Evolution recognizes.

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Payroll/ Quick Entry

1. The Payroll Quick Entry area of Evolution is the area of Evolution that allows you to enter your payroll quickly and easily.
2. The Tab allows you to customize the columns that you are viewing so that you can view the columns that you use to enter hours and earnings for your Employee's Pay.
3. You can enter any of the Earnings or Deductions that you have set up in your company to show as a column in the Quick Entry Tab.
4. When you first come into the Quick Entry Tab for the very first time the columns showing will be as seen below.

Type	Notes	EE Code	Name	Amt E07 Salary	Hrs E01 Regular	Amt E01 Regular

5. The columns default in this manner based on company and based on computer. So, if you have more than one company this will be the default for each company. When you work on more than one computer, each computer defaults to this as well.
6. Once the columns have been set on a specific company and specific computer the columns will show as you have set them on that computer and company the next time you enter into Evolution.
7. To customize the Quick Entry "Grid" with the Columns that you would like to see you right click in the gray area of the "Grid." Select E/D, Select Add or Delete. This will bring up the available list of E/D's. Select the E/D you would like to add, then either Hrs. or Amt.

Year to date F3
E/D ►
Manual Tax ►

8. Continue to add and delete columns until your "Grid" has all the E/D's you would like to have.
9. You can size the columns and move the location of the columns as well. Simply grab between the columns in the header, this will allow you to size the column. To move the columns select the header and drag the E/D to where you would like it to be located.

Amt E07 Salary	→	←	s E03	Am
1,252.65		Amt E13 Bonus		Bo

Hrs E02 Overtime	Hrs E04 Sick

Put cursor right here to resize

Drag the E/D to where you would like it to be located.
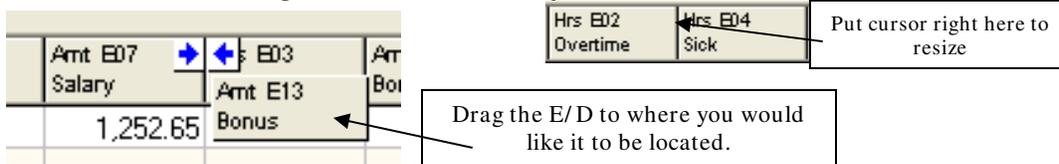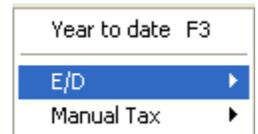
10. By typing over the amount in a scheduled Earning or Deduction you are overriding what will be paid or deducted for that check. This allows you to make adjustments that will only affect this payroll. The next time you start your payroll the Earning or Deduction would be the normal scheduled amount.
11. Employee's who have a note entered in the Employee/EE Entry/ Notes Tab/Payroll notes area of evolution will show highlighted in yellow in the Quick Entry Tab. By double clicking on the employee's name you will be directed to the Payroll/Check area where you can see and change the note on the employee.
12. The Quick Entry Tab gives you totals at the bottom of the page for the columns that you have selected in your "Grid."
13. It is a good practice to check the Earning and Deductions tab to check your totals because this tab shows you all Earnings and Deductions not just the ones that you have selected to see on the Quick Entry "Grid."
14. Always have totals from outside of Evolution to check against the totals that you have in your payroll.

Payroll/ Quick Entry W/ Overrides

1. The Quick Entry w/ Overrides Tab is very similar to the Quick Entry Tab. There are a few extra's in the Quick Entry w/ Overrides Tab that are not available in the Quick Entry Tab.
2. Employee's that are paid a Salary will have their name and text in the Salary line show in Red text.

?	Type	Notes	EE Code	Name	Check #	Amt E01 Regular Earnings	Hrs E01 Regular Earnings	Amt E07 Salary	Hrs E07 Salary
▶	R	N	10021	Allen Bart	1			1,252.65	
	R	N	10021	Allen Bart	1				
	R	N	1035	Amidala Padme	1				
	R	N	1010	Austin Jane P	1				
	R	N	1023	Brazzi Luca	1				
	R	N	10022	Caine Horatio	1			1,687.46	
	R	N	10022	Caine Horatio	1				
	R	Y	1003	Clark Mary J	1				
	R	N	10037	Clause Santa	1			1,500.00	
	R	N	10037	Clause Santa	1				
	R	N	10015	Cobblepot Oswald	1			1,000.00	
	R	N	10015	Cobblepot Oswald	1				

Tabs: Batch | Quick Entry | Quick Entry W/Overrides | Earnings and Deductions | Taxes | Import | Company contacts | Auto

10021   Allen Bart

3. You can enter another line for an employee by hitting your insert key on your keyboard. You would then enter the employee's number under the EE Code Column. If this were going to be a separate check you would enter 2 or 3, etc. in the check # Column.
4. If you are just entering more information for the first check for that employee you would enter check 1 under the check #.
5. The Quick Entry w/ Overrides allows you to enter information that is also available in the check lines. Department Allocations, Job Costing, Certified Payrolls can be keyed from this Tab. To add the needed columns, right click in the gray of the page. You can add or delete Check Line fields and E/D's

```
Add Check Line Field      ▶
Add E/D                   ▶
Add E/D...
Add all E/Ds in the batch
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Remove Check Line Field   ▶
Remove E/D                ▶
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Restore Defaults
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Notes:_____

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Payroll/ Earnings and Deductions

1. The Earnings and Deductions Tab shows all of the Earnings and Deductions in your payroll.
2. By selecting one of the codes on the left you can see all of the detail of who has this code and hours and amounts on the right.

Batch | Quick Entry | Quick Entry W/Overrides | Earnings and Deductions | Taxes | Import | Company contacts | Auto Reduction

☐ Display User Entries Separately   ☐ Display Totals By Check Type

E/D Code ▼	Description	Hours/Pie...	Amount	Count
D08	Advance		432.00	13
D21	Checking 1			11
D22	Checking 2			2
D25	Savings 1			13
D26	Savings 2			1
D40	Cafe Medical		60.00	2
D99	Miscellaneous Deduct		406.00	15
DCS	Child Support		637.00	3
DGN	Garnishment		25.00	1
DNP	Net Pay			21
E01	Regular Earnings	320.00	800.00	72
E02	Overtime			1
E03	Vacation			1
E06	PTO			1
E07	Salary		51,341.23	15
E14	Commissions		500.00	2
W1	EE WCA		132.00	66
W2	ER WCA		34.50	69

EE Code	Employee Name	Hours/Pie...	Amount
10015	Cobblepot Oswald		16.00
1017	Corleone Sonny		10.00
10014	Dent Harvey		40.00
1013	Farve Brett		25.00
1021	Goober Funny		15.00
1037	Grainger Hermione		27.00
10028	James Cody		25.00
1009	Lopez Jane J		29.00
1022	Montoya Pedro		50.00
10032	Palin Sarah		15.00
1024	Patterson James		30.00
1026	Sawyer Tom		100.00
1039	Wallace William		50.00

Select the E/D that you would like to see detail on.

View the detail for the E/D that you selected.

3. Some of the codes will not show accurate numbers until you have done a Pre-Process. For instance Net Pay will not show until the checks have been calculated.

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Payroll/ Taxes

1. The Payroll/ Taxes Tab will show you the taxes in your payroll and the detail broken out by employee.
2. You must preprocess before you will see any information in this area.
3. Select the tax that you would like to see detail for on the left. You will see the detail amount for each employee on the right.

| Batch | Quick Entry | Quick Entry W/Overrides | Earnings and Deductions | Taxes | Import | Company contacts |

☐ Display User Entries Separately

Description	Amount	Count		EE Code	Employee Name	Amount
FEDERAL EE OASDI TIPS	0.00	21		10021	Allen Bart	12.45
FEDERAL EE OASDI WAGES	57,474.73	21		1035	Amidala Padme	85.22
FEDERAL EE_MEDICARE_TAX	833.38	21		1010	Austin Jane P	42.21
FEDERAL EE_MEDICARE_TAXAB...	57,474.73	21		1023	Brazzi Luca	8.36
FEDERAL OASDI TAX	3,563.43	21		10022	Caine Horatio	54.31
FEDERAL_TAX	7,942.87	18		1003	Clark Mary J	44.07
FEDERAL_TAXABLE_WAGES	47,483.97	18		10037	Clause Santa	34.39
STATE (NM) NM-SUI TAX	1,149.50	21		10015	Cobblepot Oswald	28.98
STATE (NM) NM-SUI WAGE	57,474.73	21		1048	Corleone Don Vito	3.07
STATE (NM) TAX	2,176.51	21		1017	Corleone Sonny	346.95
STATE (NM) WAGE	57,474.73	21		10024	Elway John	614.93
				10012	Gordon Jim	6.89
				1037	Grainger Hermione	11.18
				10025	Helton Todd	120.57
				1027	Hemingway Ernest	254.89
				1036	Howeth Eva	87.46
				10007	Morrison Jim	59.04
				1011	Rice Anne R	84.63
				10023	Sharpe Shannon	56.80
				1006	Smith Lonnie T	143.60
				1014	Weasley Ginny	76.51

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Payroll/ Import

1. The Payroll/ Import tab allows you to import a file that is compatible with Evolution.

2. The source file name allows you to select where on your computer or server to go to get the file to import. By selecting the three dots to the side of the line you can select your file.
3. The exception report file name is where you are telling Evolution to send an error report if any of the information does not come in correctly when importing. You should have a notepad saved somewhere that you can tell Evolution to use to send an error report.
4. The Look EE up by should be by Custom #. If for some reason you have a file that only has names or SSN's then you would have to use the Name or SSN option.
5. The DBDT match should be on Partial (slower)
6. The File Format should be the type of file you have. If you have a comma delimited file (CSV) you would select the Comma delimited option. If you have a txt file then you would use the fixed positions.
7. None of the boxes below this should be selected.
8. You select the Import to the Payroll button to import the file.
9. Once the system has imported you will have a yellow sun at the top navigational bar. (This is how you will know information came in)
10. Before selecting the yellow sun you will want to select the View the report file to see if any error messages were created.
11. Select the Earnings and Deductions Tab to check your totals. If everything looks ok then you can select the yellow sun.
12. If you save before you checked your totals and need to start over simply go to the batch and delete the batch. Then you would re-create your batch and re-import your file.

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Payroll/ Check

1. The Payroll Check area in Payroll is where you can view and enter information on each employee's check.
2. To get into the employee's payroll check you will need to start in the Quick Entry Tab. You can either double click on the employee's name or you can select the check button at the bottom of the page while the employee's name is highlighted.
3. Once you are in the employee's payroll check you can select the Batch button at the bottom of the page to get back to the Quick Entry "Grid."
4. In the employee's check the check lines that have text in red are the Earnings or Deductions that are Scheduled. (Salary, 401K, Medical, etc.)
5. To add a check line you can either go to the last line and hit your down arrow on your keyboard, or you can hit your insert key on your keyboard.
6. To delete a check line select the line that you need to delete. Hit your ctrl and delete buttons at the same time on your keyboard. The system will prompt you Do you want to delete this check line. You can select yes or no.
7. If you have deleted a scheduled E/D that did not need to be deleted you can either just enter the code back in or you can select the General Tab. Select the Refresh Scheduled E/D's and the system will put the scheduled E/D's back into this employee's check.
8. From a specific employee's check you can scroll through the list of employee's checks in the Quick Entry by selecting your plus key on your keyboard(+) to go forward and your star key on your keyboard (*) to go back.
9. You can calculate the check that you are on by selecting the Recalculate Check Button at the bottom of the Check Lines Tab in the Payroll Check.
10. The YTD Button in the Payroll Check will give you same YTD break out that you can get from the Employee/ Employee area.
11. The Local's Button will allow you to see the employee's Locals.
12. The Preview ALD Button allows you to preview the Auto Labor Distribution for that employee.

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Creating an Additional Check

1. There are a 3 ways to create an additional check for an employee.
    a. Green Plus sign from the Payroll Check
        i. Double click on an employee from the Quick Entry Tab
        ii. Hit the Green Plus Sign at the top Navigational Bar
        iii. Select the type of Check you need to create. Select Next
        iv. Select your employee
            1. You can change the top drop down box so that you can select the employee by either
                a. EE Code
                b. EE Name
                c. SSN
            2. Then you can select your employee, Select Next
        v. If you have any check templates set up that you need to use on this check select the check template. If not just leave blank, Select Next.
        vi. Say Yes or No to if you want to pay Salary
        vii. Say Yes or No to if you want to pay regular hours. This will only affect the check if you have hours set up in the EE Entry area.
        viii. The system will create the check.
    b. Down Arrow or Insert
        i. In Quick Entry Tab you can hit your insert key on your keyboard. You could also go to the bottom of the page and hit your down arrow while on the last person in the "Grid."
        ii. This will give you another line. You will have to select the employee from the EE Code area.
            1. This will show you everyone who has ever worked for your company (Active or Inactive)
            2. These are in order by EE Code
    c. Separate Batch
        i. From the Payroll Batch Tab select the Create Batch Button
        ii. Put a check mark in the select EE from list.
        iii. Select the type of check you are creating.
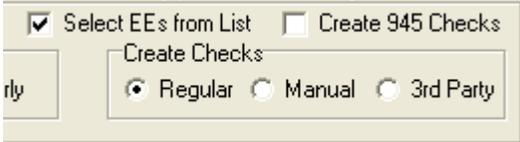
        iv. Save by selecting the green check mark and yellow sun.
        v. The system will prompt you do you want to auto create checks. Say Yes
        vi. This gives you the list of employee's. You can select your employee from the list.
            1. If you need to select more than one employee hold down your ctrl button on your keyboard while selecting the employee's. Select the ok button once done.

Notes:_____

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Creating a 3rd Party Sick Check

1. 3rd Party Sick Checks must be entered when you are doing your payroll.
2. From the Payroll Batch area of Evolution Select the Create Batch Button.

   Create Batch

3. Put a check mark in the Select EEs from List box. Select 3rd Party from the Create Checks box. Both of these functions are located at the bottom right of the screen.

   ☑ Select EEs from List   ☐ Create 945 Checks
   ┌─ Create Checks ──────────────────┐
   │ ○ Regular ○ Manual ⦿ 3rd Party │
   └───────────────────────────────────┘

4. Select the Green Check mark at the top of the page.   ✓

5. A pop up will ask you:

   Evolution   ☒
   ? Would you like to auto-create checks for this batch?
   [❗ Yes]   [⊘ No]

6. Say Yes

7. This will give you the list of Employees. Select the Employee(s) that you need to create 3rd party sick checks for. (To select more than one employee hold your CTRL key on your keyboard down while selecting employees.)

EmployeeSelector   ☒

? EE Code ▼	Last Name	First Name	SSN	Status
1001	Simpson	Jake	100-00-0001	Termination ...
1002	Ortega	Roberto	100-00-0002	Active
1003	Clark	Mary	100-00-0003	Active
1004	Franklin	Alberta	100-00-0004	Voluntary Re...
1005	Rodriguez	Alonso	100-00-0005	Active
1006	Smith	Lonnie	100-00-0006	Active
1007	Hayworth	Thomas	100-00-0007	Terminated
1008	Wallace	Teresa	100-00-0008	Terminated
1009	Lopez	Jane	333-44-5555	Active
1010	Austin	Jane	123-22-3333	Active
1011	Rice	Anne	555-55-6666	Active
1012	Chavez	Josh	888-77-9999	Termination ...
1013	Farve	Brett	555-55-5555	Active
1014	Weasley	Ginny	354-17-1351	Active
1015	Yellow	Scratch Pad	500-00-0001	Active
1016	Training	Sample	100-10-0123	Active
1017	Corleone	Sonny	100-10-0101	Terminated
1018	Hagen	Tom	100-00-0012	Active
1019	Valenzuela	Maria	424-36-8989	Active
1020	Jones	Mary	111-00-0002	Suspended
1021	Goober	Funny	111-00-3541	Active

[✓ OK]   [✗ Cancel]

8. Your 3rd Party provider will give you the information that needs to be entered.
9. Double click on the employee's name to enter the information into the system. This takes you to the payroll check area.
   a. Select the proper Third Party Sick Code.
   b. Enter in the Amount

? E/D Code	E/D Description	Hours/Pieces	Rate of Pay	Amount
▼				
E90	Short Term Third Party Sick Pay			
E91	Long Term Third Party Sick Pay			

Tabs: Check Lines | Manual Tax | General | Tax Overrides | Preview | Employee Notes

10. Select the Manual Tax Tab.
    a. Your 3rd party administrator will also have provided you with tax information if there are taxes being taken out of the sick pay.
    b. If provided with tax amounts enter them into the appropriate line.
    c. You may have to select the Add States Button if there are State Taxes for those lines to show.
    d. Make sure that you select the Yellow Sun after each tax that is entered.

11. Select the Recalculate Check Button at the bottom of the page. Make sure that the Net Amount matches the information that was given to you by the 3rd party administrator.

Tabs: Check Lines | Manual Tax | General | Tax Overrides | Preview | Employee Notes

? Row	Description	Amount
1	Federal	
2	OASDI	
3	Medicare	
4	EIC	
5	Back-up Withholding	
6	STATE - NM	
7	SDI - NM	
8	SUI - NM-SUI	
9	SUI - ER WCA	
10	SUI - EE WCA	

Calculate Override Taxes
⦿ Yes ○ No

Reciprocate SUI
⦿ Yes ○ No

Disable Shortfalls
○ Yes ⦿ No

🔁 Prorate FICA

🔁 Recalculate Check

🔺 Add States   ➕ Add Locals

12. If you have more than one employee that you are entering 3rd party sick information for select the Batch Button at the bottom of the page.
13. Double click on the employee that you need to enter information for and follow steps 9-12 until all Employees information is entered.
14. Now you can select the Batch Tab to create your regular payroll Batch. Select the Batch button making sure that the Select EE's from List is not selected and the check type is regular.

Job Costing

1. Job Costing can be done from the Payroll Check. Your company must have jobs created at an upper level.
2. Double Click on the employee from the Quick Entry Tab
3. Right click in the gray area of the Check Lines to add the Job Column in the Check Lines Tab.
4. Select the Job from the Job Column/ either on the line with the correct E/D code or add a line (by hitting the down arrow on your keyboard while on the last row) or hit insert on your keyboard and select the correct E/D code.
   a. Enter hours and/or earnings

Notes:_____

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Creating a Manual Check

1. To Create a Manual Check in Evolution there are a few ways that you can do this. The first way is by Using the Check Calculator to create a Manual Check
   a. Tax & Check line Calculator when the Tax & Check line Calculator is selected it takes you to a calculator for the employee that you are currently in.

While in the Tax Calculator you can select the Earnings or Deductions that you need to be in the check. Then enter the amount for those E/D's. You can select how the taxes are to be handled. You can even Gross up a check by check the Net to Gross box and putting in the Net Amount.

Select the net to Gross box and enter the Net amount that you want.

Control the taxes here.

Enter the E/D's here.

   a. By selecting the Check Type as Manual you can create a manual check.
   b. Select the Copy to Payroll Button.
   c. You will be directed to the Payroll Tab
      i. You can select to attach the manual check
         1. To a New Payroll
            a. The system will ask if you would like to attach to the next scheduled payroll:

            b. You will then be prompted with the next available scheduled Payroll check date.
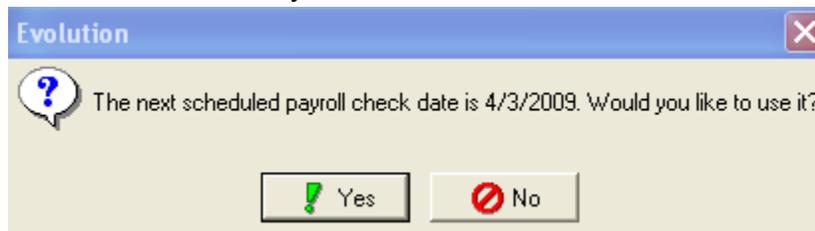
c. You then enter the Manual Check Number:

Input required

Please, enter a Manual Check Number

[   ]

✓ OK   ✗ Cancel
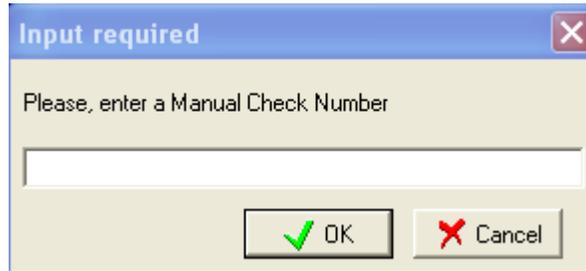
2. To a New Batch
    a. You will select the check date from the list of payrolls open on the left.
    b. The system will prompt you to enter the Manual check number.

Tax and Check Line Calculator

Tax | Check Preview | Payrolls

Check D... ▾	Run Nu... ▾	Scheduled	Type	Status
6/9/2006	1	Y	R	W
4/4/2008	1	Y	R	W
5/2/2008	1	Y	R	W
5/16/2008	2	Y	R	W
5/30/2008	1	Y	R	W
6/13/2008	1	Y	R	W
6/27/2008	1	Y	R	W
7/11/2008	2	Y	R	W
8/8/2008	1	Y	R	W
8/22/2008	1	Y	R	W
12/26/2008	1	Y	R	W
1/9/2009	1	Y	R	W
1/23/2009	1	Y	R	W
2/6/2009	1	Y	R	W
2/20/2009	1	Y	R	W
3/20/2009	1	Y	R	W
4/3/2009	1	Y	R	W

Period Begin ... ▴	Period End Date	Frequency
3/18/2009	3/31/2009	B
3/18/2009	3/31/2009	B

Input required

Please, enter a Manual Check Number

[   ]

✓ OK   ✗ Cancel

Attach to New Payroll   Attach to New Batch   Attach to Selected Batch

3. To Selected Batch
    a. You will select the check date from the list of open Payrolls on the left.
    b. You will select the batch that you want the check to be attached to from the list of available open batches on the right.

2. The other way of creating a manual check is in the Payroll Area
3. Open your next scheduled Payroll (unless the payroll for your next check date has already been opened. If so jump to # 4)
4. Select Create Payroll
5. Select Green check mark
6. Select Create Batch
7. Select Payroll Filter (if you do not have a payroll filter to choose from in the drop box jump to #18)
8. Select manual in the create checks box at bottom of the page.
9. Select EE's from List box

10. Select Green Check (when prompted do you want to auto create checks say yes)

9. Select Employee (s) in list that you need to create a m...
employee hold your Ctrl button on your keyboard down)
10. Click on ok when you have selected the
    Employee(s)
11. Select Quick Entry
12. Select the employee you want to enter information
    on. (Either Double Click on the Employee or
    select the employee and then click on the check
    button at the bottom of the Quick Entry screen.
13. Enter information for manual check
    a. Useful tool: If you need to bring in the
       Scheduled Earnings and Deductions for the
       employee you are creating a manual check for
       go to the General Tab. Then select the
       Refresh Scheduled E/D's button. Then select
       the Check Lines Tab to see the information.
    b. To Delete check lines hit Ctrl + Delete on your
       keyboard while the line you want to delete is
       highlighted.

c. Useful tool: When creating a manual check you must enter everything into the system. You must also tell it to calculate information. If you enter hours into the check line you must enter the rate that the hours need to be paid at and then you must right click with your mouse and then select Calculate Check Line or hit Ctrl+F5.
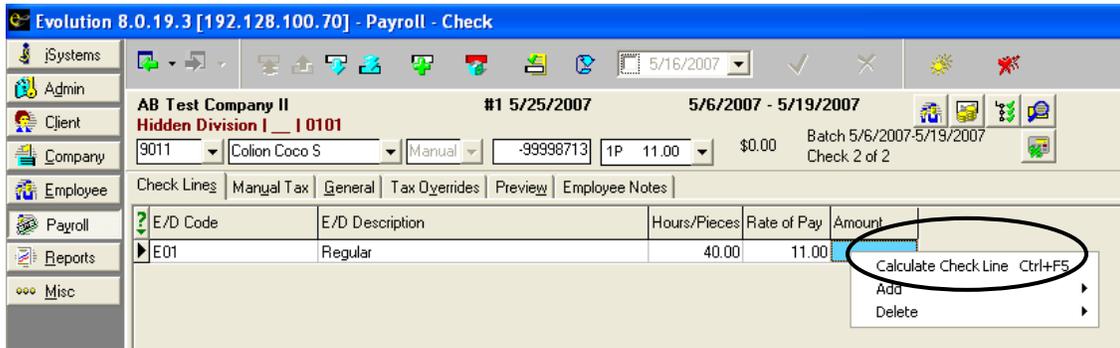
d. Useful tool: If you need to enter the check number that you will be using for the check that you will cut you can enter that in the Check Lines. There are boxes above the Tabs in the Check Lines Screen. You can select the box above the Preview Tab and enter your check number.

14. Once all information for the manual check is entered select Recalculate Check at the bottom of the Check Lines screen.
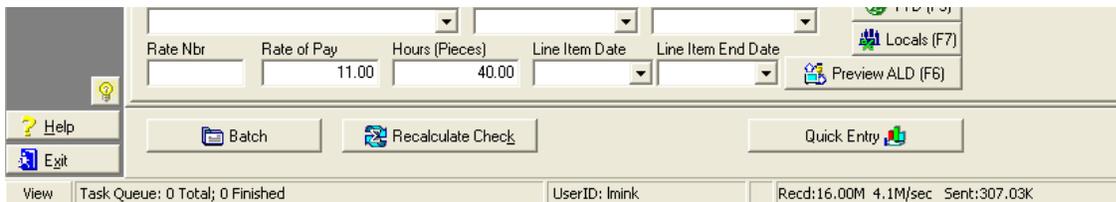
15. Evolution will calculate the check and take you to the preview screen. This is where you will see the taxes, and the net amount. You will write the check for the net amount.
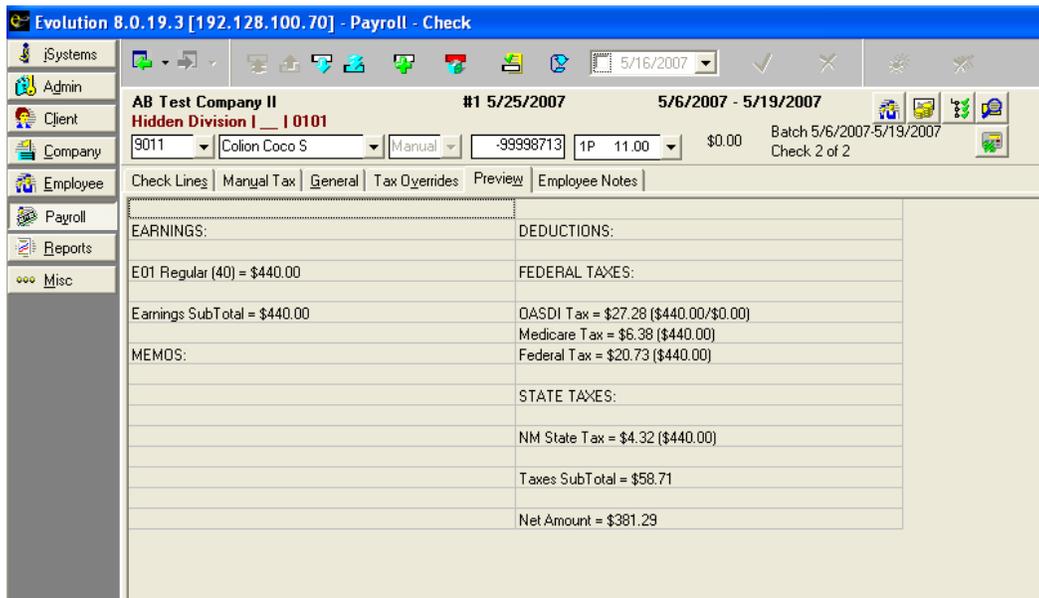
16. Make sure that you commit (click the Yellow Sun) to save the manual check information to the Evolution database.
17. You can now select the Batch Button or the Quick Entry Button at the bottom of the screen. This takes you back to the Quick Entry Screen. (If entering more than one manual check you will follow # 11 - 16 for each manual check.)
18. Useful Information: Creating a Filter in Evolution.
    a. You may want to add a Payroll Filter to your company for instances when you have more than one batch in your payroll. Creating a Payroll Filter will allow you to identify the batch's in your payroll. For instance you may want to create a batch with manual checks in it. You could use a filter called manual checks to identify that Batch.
    b. To add a Payroll Filter to your Company go to the Company side Button

c. Now you will want to select the Payroll Defaults Subfolder. Then select Payroll Filters.

d. Select the Detail Tab at the top of the page.

e. Select the green plus sign

f. Enter the name of the Filter that you are creating on the Name line at the bottom of the page.

Name	Manual Checks
Division	
Branch	
Department	
Team	
PayGroup	

g. Select the green check mark and then the Yellow Sun to save your work.

h. You can continue to select the green plus sign to add filters for the Batches that you create.

iSystems	Client	AB001	AB Test Company		
Admin	Company	AB001	ABC Test Company		
Client	Browse	Details			
Company					
Employee	Name		Division	Branch	
Payroll	Pay Filter 2		APS	1	
Reports	Payroll Filter		APS	1	
Misc					

Name	Pay Filter 2		
Division	APS		
Branch	1		Home
Department	2		Dept 2
Team			
PayGroup	EEs With Green Eyes		

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Print Back Checks/Manual Check

1. Go to Reports/ Reprint Checks/Reports
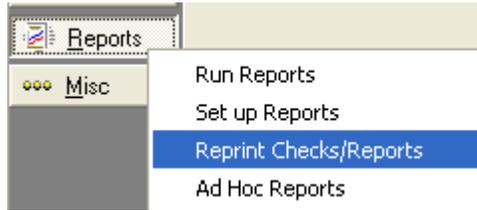
2. In the Browse Tab open your company.
3. On the right side of the screen select the check-date.
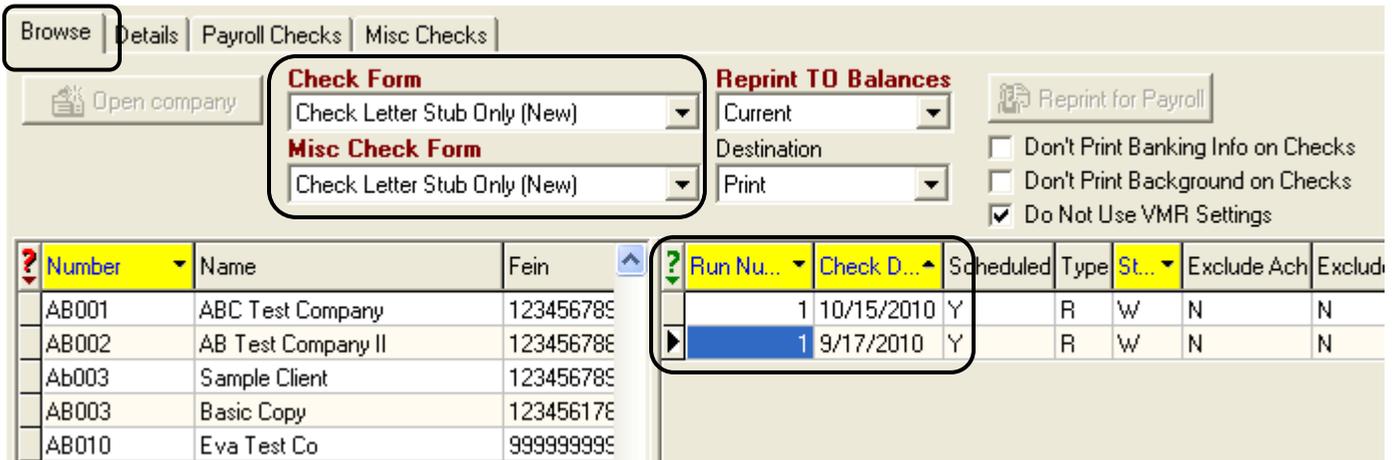
4. Select Check Letter Stub Only (New) from the Check Form, and Misc Check Form drop boxes.
5. Leave the Destination as Print.
6. Select the Payroll Checks Tab

7. Select the Manual Check that you would like to print the stub for.
   a. If you are selecting more than one check to print select your CTRL key on your keyboard and then select the checks.
8. Select the Green Plus Sign at the top of the page.
9. The system will prompt you with this message.
10. Select Yes.
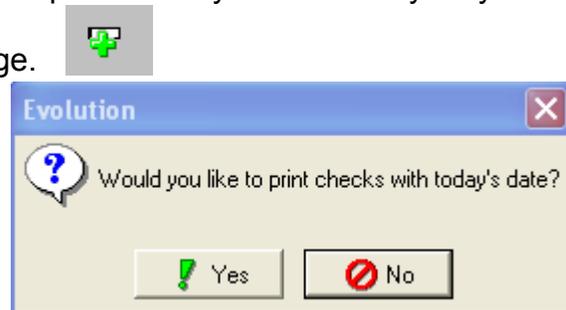
11. The system will prompt you with this message.
12. Select Yes.
13. The system will ask you to enter a reason for the Reprint

Evolution

? Reprint SELECTED Payroll Checks?

! Yes   ⊘ No

Payroll Expert

Please, enter a reason for check reprint.

Next ▶

Evolution

Your task has been added to the queue

✓ OK
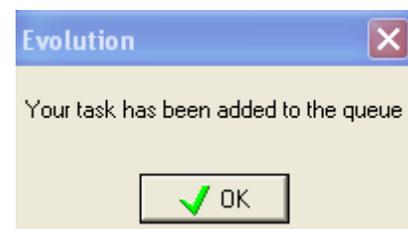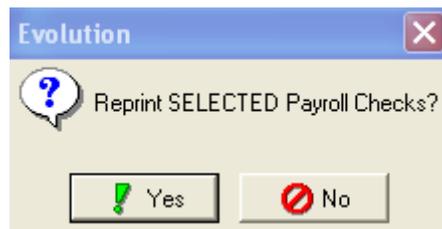
14. The system notifies you that this has been added to the Queue.
15. Your check stub(s) will print to the printer that you have defined as your default printer in the Workstation Settings area of Evolution.
16. If you need to set your printer in the Workstation Settings Area
    a. Go to Admin/ Workstation Settings

    Admin
    Security   ▶
    Financ   System Information
    S/B Re   Workstation Settings
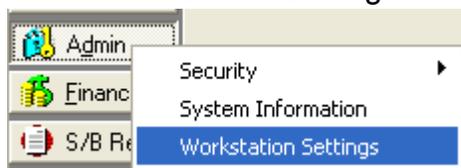
    b. Set the printer that you want to print the check to as the Checks Printer

Settings | External
Workstation Printing
Duplex Printing
Only Reports with Duplexing ▼   ☐ Always do report preview   ☐ Always show ASCII File Save Dialog
Checks Printer   Reports Printer
HP LaserJet 8150 Series PCL   ▼   HP LaserJet 8150 Series PCL   ▼

Unique Payroll Solutions
PAYDAY INC.
25 YEARS

Correction/Additional Runs

1. Correction and Additional Runs must be run through Payday. There are many security policies that Payday has in place when it comes to Correction and Additional Runs.
    a. Examples of Corrections Runs:
        i. Voiding a check
        ii. Missed paying an employee
            1. This could also be handled with a Manual Check to document what was paid, and the Client writing a check on site.
    b. Examples of Additional Runs:
        i. Bonus Run
        ii. Terminated an employee that must be paid right away
            1. This could be handled with a Manual Check as well.
2. To request a Correction or Additional Run simply contact your CSR at Payday.
    a. Your CSR will take any information that is needed to do the Run
    b. Your CSR will enter the run
        i. Unless this is a large run in which case we will work closely with you to enter the information.
    c. This is because of some of the security procedures in place.

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Voiding Checks

1. When voiding a check in Evolution you need to make sure that you have the information about the check that you will be voiding.
   a. Have the check number, employee number, name, and net amount for the check that you will be voiding.
   b. If the wrong check is voided in accident it is difficult to correct this mistake.
2. **It is very important that if the check that needs to be voided was <u>Direct Deposited</u> you will need to call your CSR for assistance.**
3. There are two ways that you can void a check.
4. The first way to void a check
   a. In Evolution select the Payroll Tab
   b. Select the Payroll Tab
   c. If your payroll is already open you will select the payroll then select Batch at the bottom of the page.
   d. If you payroll is not open select the Create Payroll Button
   e. From the Batch Tab select Create Batch Button
      i. Select the EEs from List check box
      ii. Select Manual from the Create Checks area

      iii. Click on the Green Check mark at the top of the page.
      iv. A question box will come up. Select Yes to the question: Would you like to auto-create checks for this batch?"
      v. Another question box will come up. Select No to the question: Do you want the balance of the scheduled EDs for manual checks to be updated?
      vi. Select the employee that you will be voiding the check for.
         1. If you will be voiding more than one check you need to select each of the employee's that you will be voiding checks for. Select more than one employee by holding the CTRL key on your keyboard down.
   f. Select the Quick Entry Tab or Button
   g. Double Click on the manual check that is in the Quick Entry Tab

Payroll Expert

Please, choose check type.

Regular
Regular
Void
3rd Party
Manual
Cobra Credit
Setup YTD
Setup QTD

h. Hit the Green Plus Sign at the top of the screen.
i. Select Void from the drop down box in the first option from the Payroll Expert box
j. Select Next
k. Change the Begin Check Date and the End Check Date so that the check date for the check that needs to be voided will show.
l. Select the Filter Button
m. Select the check that needs to be voided.
     i. Be sure that you have the correct check selected it is difficult to bring a check that has been voided back.
n. Select the Ok Button
o. Your check is now voided.
p. If you are voiding more than one check you will need to go into the Quick Entry area (from here select Batch at the bottom of the page) follow steps g through o to complete.
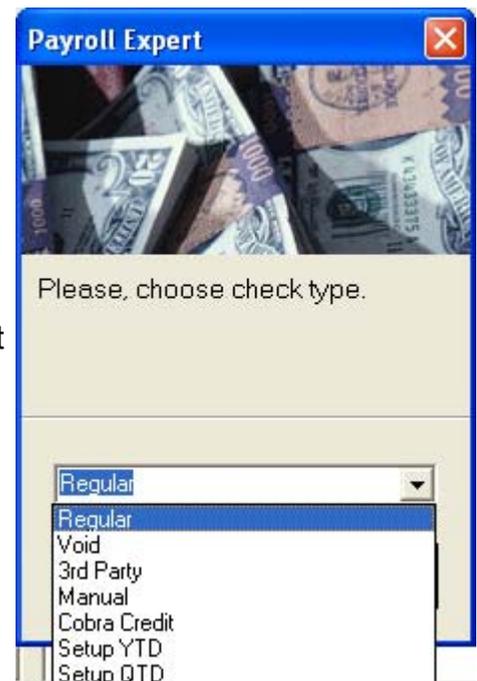
5. The second way that you can void a check.
   a. In Evolution select the Payroll Tab
   b. Select the Payroll Tab
   c. If your payroll is already open you will select the payroll then select Batch at the bottom of the page.
   d. If you payroll is not open select the Create Payroll Button
   e. From the Batch Tab select Create Batch Button
      i. Select the EEs from List check box
      ii. Select Manual from the Create Checks area

      iii. Click on the Green Check mark at the top of the page.
      iv.   A question box will come up. Select Yes to the question: Would you like to auto-create checks for this batch?"
      v. Another question box will come up. Select No to the question: Do you want the balance of the scheduled EDs for manual checks to be updated?
      vi. Select the employee that you will be voiding the check for.

1. If you will be voiding more than one check you need to select each of the employee's that you will be voiding checks for. Select more than one employee by holding the CTRL key on your keyboard down.
   f. Select the Quick Entry Tab or Button
   g. Double Click on the manual check that is in the Quick Entry Tab
   h. Select the General Tab
   i. Select the Void Next Check button
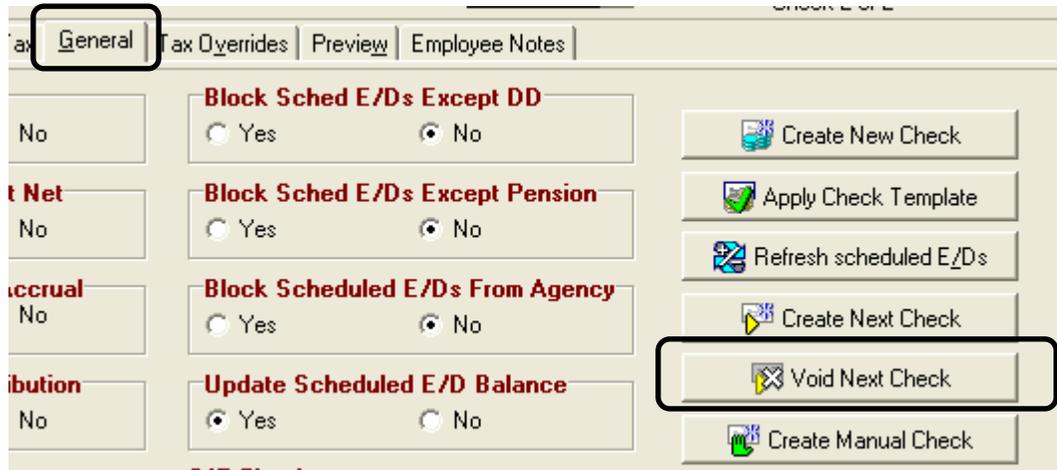
   j. Change the Begin Check Date and the End Check Date so that the check date for the check that needs to be voided will show.
   k. Select the Filter Button
   l. Select the check that needs to be voided.
       i. Be sure that you have the correct check selected it is difficult to bring a check that has been voided back.
   m. Select the Ok Button
   n. Your check is now voided.
   o. If you are voiding more than one check you will need to go into the Quick Entry area (from here select Batch at the bottom of the page) follow steps g through o to complete.
6. For both ways that you void a check once you have voided the check you will need to go back to the quick entry and delete the manual check.
   a. Select Batch from the Check screen to get back to the Quick Entry screen. Select the manual check that needs to be voided there will be an M in the type column.
   b. Hit your Ctrl key and your delete key on your keyboard at the same
   c. A message Box will come up. Select OK to Delete this check?

DBDT Allocating

1. DBDT Allocating allows you to allocate your employee's pay between different departments.
2. From the Quick Entry Tab double click on your employee.
3. Right Click in the gray area to add the Division, Branch, Department, and Team Columns.
4. You can just add the columns which you need to use to allocate the wages.
5. You can drag the columns into the order that is best for you to key the information onto the check.

Add ▶	DEPARTMENT
Delete ▶	DIVISION
	BRANCH
	TEAM

Check Lines | Manual Tax | General | Tax Overrides | Preview | Employee Notes

? DEPARTMENT	E/D Code	E/D Description	Hours/Pieces	Rate of Pay	Amount
	W2	ER WCA			
	W1	EE WCA			2.00
	D99	Miscellaneous Deduction			20.00
▶ 500	E01	Regular Earnings	10.00	8.00	80.00
200	E01	Regular Earnings	20.00	8.00	160.00
400	E01	Regular Earnings	30.00	8.00	240.00
100	E01	Regular Earnings	20.00	8.00	160.00

6. Above is an example of how the wages could be allocated. By selecting the department from the drop box in the department column, and then entering in the hours that go to each department.
7. Once you have entered in all of your hours for your employee's then you can run a pre process. Once the pre process has run you can run a labor report. We offer many different types of labor reports.

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One time entries in Payroll

1. Any one time changes to your payroll can be entered in the Payroll Check and those changes will only affect that check.
   a. Entering one time changes
      i. Usually the best place to enter one time changes is in the payroll check.
         1. From the Payroll Quick Entry Tab double click on the employee you are working on.
            a. Select the last line in the Check Lines Tab or select your insert key on your keyboard.
            b. This will give you another check line to enter in your one time entry. You can enter any of your E/D's as the code.
            c. You can override the pay rate.

~The lines with Red Text are Scheduled E/D's.
~ On this check the EE's rate has been overridden.
~ On this check the EE needed to have an additional $20. Of 125 Medical taken to catch the EE up on this code.

Check Lines	Manual Tax	General	Tax Overrides	Preview	Employee Notes			
? E/D Code		E/D Description				Hours/Pieces	Rate of Pay	Amount
E07		Salary					0.00	2,884.00
D08		125 Dental						15.00
D07		125 Medical						170.00
D01		Advance						35.20
DNP		Net Pay						
D04		401k						
▶ E01		Regular				30.00	20.00	600.00
D07		125 Medical						20.00

      2. If you are changing a Scheduled E/D it is easier to change these from the "Grid" or Quick Entry Tab.
         a. Add the column that you need to affect. Override the amount or hours that are in the Scheduled E/D. This will change this on the employee you are working on for only this payroll check.

Batch	Quick Entry	Quick Entry W/Overrides	Earnings and Deductions	Ta:

1004   Weasley Ronald K

? Type	Notes	EE Code	Name	Amt D08 125 Dental	Amt E07 Salary
R	N	1054	Dunns Esther V		
R	N	1019	Duran Scott E		
R	N	1038	Federer Roger J		5,555.00
R	N	1042	Federline Kevin A	3.00	

~ If I wanted to override the amount being taken for Dental for this payroll check for Kevin Federline I could simply type over the 3.00 with the amount that needs to be taken.
~ If I needed to override the Salary amount that is being paid on this payroll check for Rodger Federer I could simply type over the salary amount with what should be paid this time.

   b. Deleting for one time changes in the payroll
      i. If you are deleting in a payroll check for a one time payroll change it will be a scheduled E/D that you will be deleting.
         1. From the Quick Entry Tab double click on the Employee
         2. Select the line that needs to be deleted in the Payroll Check Lines Tab.
         3. Select CTRL + Del on your keyboard.
         4. The system will ask if you want to delete this check line. Select Ok to delete.
      ii. You may need to delete an employee's payroll check.
         1. This is done from the Payroll Quick Entry Tab.
            a. Select the employee that's check needs to be deleted.
            b. Select CTRL + Del on your keyboard.
            c. The system will ask if you want to delete this check. Select Ok to delete.

Comments on Checks

1. From the Payroll/ Payroll area you are able to enter a comment on your employee's checks.
    a. The Payroll Check Comment area allows you to put a note on your employee's checks. Notes enter in this box will show on everyone check stub.

2. You can enter a comment on just one Person's check so that the comment will show on the employee's check stub.
3. This is entered in the employee payroll check.
    a. From the Payroll Quick Entry Tab double click on the employee that you will be entering a note on.
    b. Select the General Tab.
    c. The box at the bottom of the page that says Current Check Comments will allow you to enter a comment on this person's check.
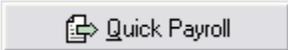

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Entering Your Payroll
Regular
No Overrides in Batch

1. Do all Employee Maintenance first. (Ex: new employee's, terminations, address changes, pay rate changes, deduction changes or additions)
   a. Note: most employee maintenance can be done throughout the pay period so that when it is time to do payroll all maintenance will already be done.
2. Select the Payroll Button.
3. Read Company Notes, if any.
4. Select the Payroll Tab
5. Select the Quick Payroll Button. [⇨ Quick Payroll]
6. The Quick Entry Tab holds a grid that looks like a spreadsheet. You can customize this Tab to allow you to enter your payroll quickly and easily. Please reference the Quick Entry Tab in previous pages on how to customize this area.
7. Input your payroll.
8. Check your totals by selecting the Earnings and Deductions Tab.
   a. Any Codes that require the check to be calculated for the amount to show will not show accurately until you do your pre process.
9. Select the Quick Entry Tab
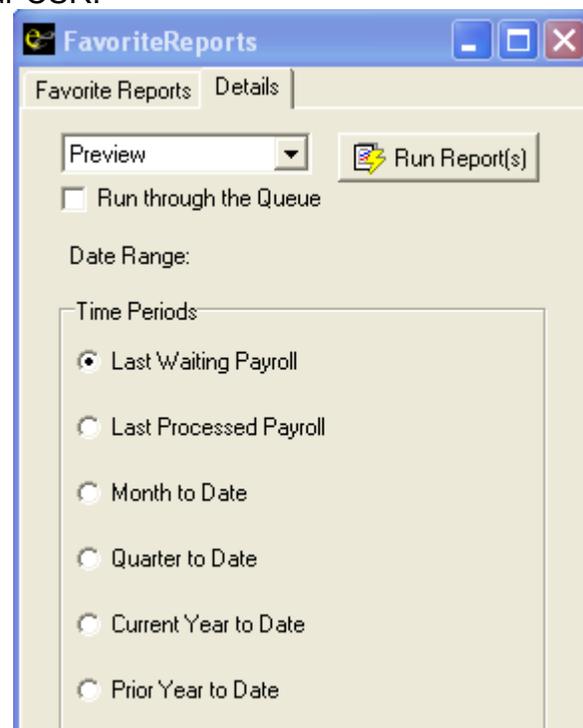10. Select the Pre Process Payroll Button at the bottom of the page.

[⚡ Pre-Process] [✓ Submit Payroll]

11. This calculated all of your checks.
    a. Any checks that <u>did not</u> have any earnings will fall out of the payroll.
12. At the bottom of the page the status of the pre process can be seen.

Task Queue: New Finished: 1 Total: 6 Finished: 6   When the total amount and the finished amount match the pre process is done running.

13. Select the small View button located below the Exit to enter the Queue. [Exit]
    a. This is where you can see if your pre process ran successfully.   [View | Task]
    b. If your pre process ran with any errors call your CSR.
14. Once your pre process has run successfully you can run reports to check your payroll before submitting it.
15. Select the Favorite Reports Button at the top of the screen.
16. The Favorite Reports will pop up.
17. Select the Payroll Register Report by clicking in the box beside the name.
18. Select the Details Tab
19. Select Preview
20. Select Last Waiting Payroll
21. Uncheck the Run through the Queue box.
22. Select the Run Reports Button.
23. The report will run and come up on your screen.
24. You can either print or save your report from here.
25. Review the report for any errors in the payroll.

FavoriteReports

Favorite Reports | Details

Preview ▼   [⚡ Run Report(s)]
☐ Run through the Queue

Date Range:

Time Periods
  ● Last Waiting Payroll
  ○ Last Processed Payroll
  ○ Month to Date
  ○ Quarter to Date
  ○ Current Year to Date
  ○ Prior Year to Date

Unique Payroll Solutions
PAYDAY INC.
25 YEARS

26. If you need to make any corrections in your payroll before you submit
    a. Select the Payroll Button, then Payroll Tab
    b. Select the Check Date that you are working in.
    c. Select the **Batch Button** at the bottom of the page.
    d. If you only have one Batch open it will take you straight into the Quick Entry tab for your Batch
    e. If you have more than one Batch in your payroll select the batch that you need to enter from the Batch Tab, and then the Quick Entry Tab.
    f. Enter your corrections
    g. Re-run your Pre Process and Payroll Register Report.
27. Once you are sure that your payroll is correct and ready to be submitted. Select the Payroll Button, then Payroll Tab
28. Select the check date you are working on.
29. Select the SB Review Button

30. The System will ask:
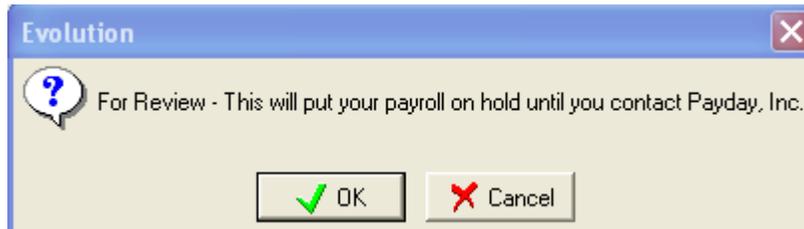
    a. This will make everything in the system go gray so that you will not be able to enter or do anything until your payroll has been processed.
    b. Select OK

31. The system will pop up:
    a. This will allow you to email your payroll contact to let them know that your payroll is done and note anything that you would like them to look over for you.
    b. It is very important that you contact your CSR to let them know you are done, and to note anything that you want them to check. If you do not want to email them then call.
    c. Your payroll will be on Hold until the payroll has been processed. Once the Status changes to P you will be able to make changes in the system.

Notes:_____

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Entering Your Payroll
Regular

1. Do all Employee Maintenance first. (Ex: new employee's, terminations, address changes, pay rate changes, deduction changes or additions)
   a. Note: most employee maintenance can be done throughout the pay period so that when it is time to do payroll all maintenance will already be done.
2. Select the Payroll Button.
3. Read Company Notes, if any.
4. Select the Payroll Tab
5. Select the Create Payroll Button.
6. Verify your check date and click the green check mark to save
7. This will then take you to the Payroll Batch Screen.
8. Select the Create Batch Button
9. Verify the beginning and ending pay period dates.
10. Select the green check mark to save your batch.
11. Answer Yes to auto-create checks for this batch. This will create a check for everyone who is Active in the system.
12. Select QUICK ENTRY at the bottom of the page. You will now see the "Grid" with all your Active employees.
13. The Quick Entry grid looks like a spreadsheet. You can customize this Tab to allow you to enter your payroll quickly and easily. Please reference the Quick Entry Tab in previous pages on how to customize this area.
14. Input your payroll.
15. Check your totals by selecting the Earnings and Deductions Tab.
   a. Any Codes that require the check to be calculated for the amount to show will not show accurately until you do your pre process.
16. Select the Quick Entry Tab
17. Select the Pre Process Payroll Button at the bottom of the page.
18. This calculated all of your checks.
   a. Any checks that <u>did not</u> have any earnings will fall out of the payroll.
19. At the bottom of the page the status of the pre process can be seen.
    When the total amount and the finished amount match the pre process is done running.
20. Select the small View button located below the Exit to enter the Queue.
   a. This is where you can see if your pre process ran successfully.
   b. If your pre process ran with any errors call your CSR.

Notes:_____

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21. Once your pre process has run successfully you can run reports to check your payroll before submitting it.
22. Select the Favorite Reports Button at the top of the screen.
23. The Favorite Reports will pop up.
24. Select the Payroll Register Report by clicking in the box beside the name.
25. Select the Details Tab
26. Select Preview
27. Select Last Waiting Payroll
28. Uncheck the Run through the Queue box.
29. Select the Run Reports Button.
30. The report will run and come up on your screen.
31. You can either print or save your report from here.
32. Review the report for any errors in the payroll.
33. If you need to make any corrections in your payroll before you submit
    a. Select the Payroll Button, then Payroll Tab
    b. Select the Check Date that you are working in.
    c. Select the **Batch Button** at the bottom of the page.
    d. If you only have one Batch open it will take you straight into the Quick Entry tab for your Batch
    e. If you have more than one Batch in your payroll select the batch that you need to enter from the Batch Tab, and then the Quick Entry Tab.
    f. Enter your corrections
    g. Re-run your Pre Process and Payroll Register Report.
34. Once you are sure that your payroll is correct and ready to be submitted. Select the Payroll Button, then Payroll Tab
35. Select the check date you are working on.
36. Select the SB Review Button
37. The System will ask:
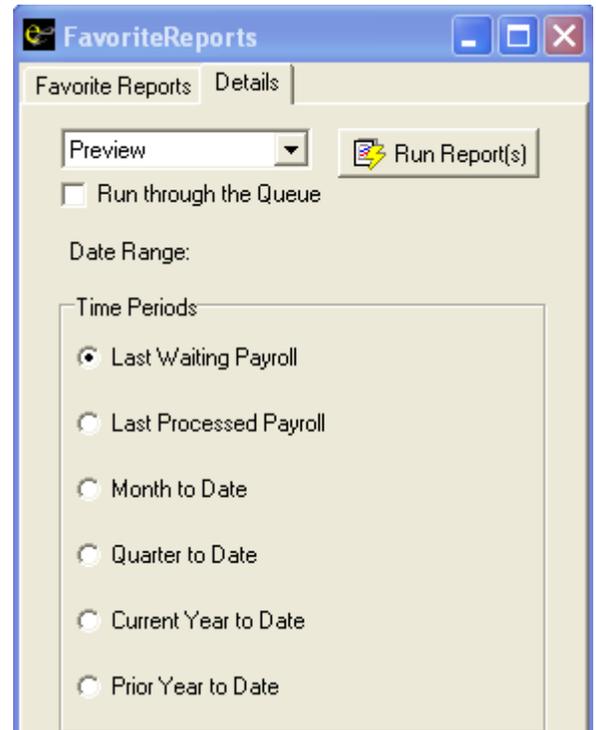
    a. This will make everything in the system go gray so that you will not be able to enter or do anything until your payroll has been processed.
    b. Select OK

Notes:_____
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Evolution

Thank you. Your payroll has been successfully submitted to Payday, Inc. for review. Would you like to e-mail your contact at Payday, Inc.?

[✓ Yes]   [⊘ No]

38. The system will pop up:
   a. This will allow you to email your payroll contact to let them know that your payroll is done and note anything that you would like them to look over for you.
   b. It is very important that you contact your CSR to let them know you are done, and to note anything that you want them to check. If you do not want to email them then call.
   c. Your payroll will be on Hold until the payroll has been processed. Once the Status changes to P you will be able to make changes in the system

Notes:_____

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Entering Your Payroll
Net Clock (Web Clock)

1. Do all Employee Maintenance first. (Ex: new employee's, terminations, address changes, pay rate changes, deduction changes or additions)
   a. Note: most employee maintenance can be done throughout the pay period so that when it is time to do payroll all maintenance will already be done.

2. You will want to make sure that employee's code in Web Clock matches the Employee number in Evolution
3. To view employee information in Web Clock Select Employee Setup, select the Employee you want to see.

You can select the employee you want to see by clicking on the employee.

Once in the employee setup screen you can verify that the employee's information is correct (employee number)

Employee Setup

	Employee Name
	(add new)
☐	Abbott, Cassandra
☐	Arnot, Josh
☐	Ashby, Erin
☐	Bailis, Janet
☐	Behrend, Steven
☐	Blanton, Roberts
☐	Blaser, Mark
☐	Brown, Bryce
☐	Manning, Daniel
☐	Bailey, Donald

10 employees shown.

Check All | Clear All |

Employee Setup

* denotes required fields.

First Name*	Cassandra		Middle Name	
Last Name*	Abbott		Designation	
Title			Department	server
Location			Supervisor	
Home 1	hostess		Home 2	bar
Home 3			SSN	
Web Password			Auto Lunch	30 minutes, after 6 hours.
Start Date			End Date	
Employee Code	1234		Default Payrate	2.13
Pay Rate 1	7.25		Pay Rate 2	8.5
Pay Rate 3	0		Card Number 1	5555555
Card Number 2			Card Number 3	
Schedule			Additional Options	
Export Block	☐ (if checked, employee's payroll data won't be downloaded)			

Save   Cancel

4. Once you have done all maintenance in Evolution and Net Clock
5. Select the Payroll Button.
6. Read Company Notes, if any.
7. Select the Payroll Tab
8. Select the Quick Payroll Button.   📥 Quick Payroll
9. The Quick Entry Tab holds a grid that looks like a spreadsheet. You can customize this Tab to allow you to enter your payroll quickly and easily. Please reference the Quick Entry Tab in previous pages on how to customize this area.
10. Go to Net Clock (all time in the clock should be correct at this time.)
11. Go to Reports (located in Main Menu)

Notes:_____

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12. Select Summary Report
13. Select the pay period that you are paying your employee's for. Usually this is the second option.
14. Standard payrolls will select the Show Wages & Dollar Amounts in the Report Options.
15. The Show Which Employee Fields can be left blank in most standard Payrolls.
16. The Sorting and Filtering can be Sorted by Employee Name and No Filtering.
17. Select Run Report.

Online Timekeeping

Date: 3/10/2009
Login: online

Report Menu
Online Demo

Daily Auto Email Report
Detail Report
Download Activity Files
Employee Export
Labor Code Reporting
Payroll Settings
Single-Day Report
Summary Report
Summary Report (Unformatted)
Time Cards

This is a demo account. None of the names or data in this account are real.

[Back To Main Menu]

Payroll Summary Report

Company-wide summary for a single pay period. Shows total hours and earnings for each employee, broken down by category.

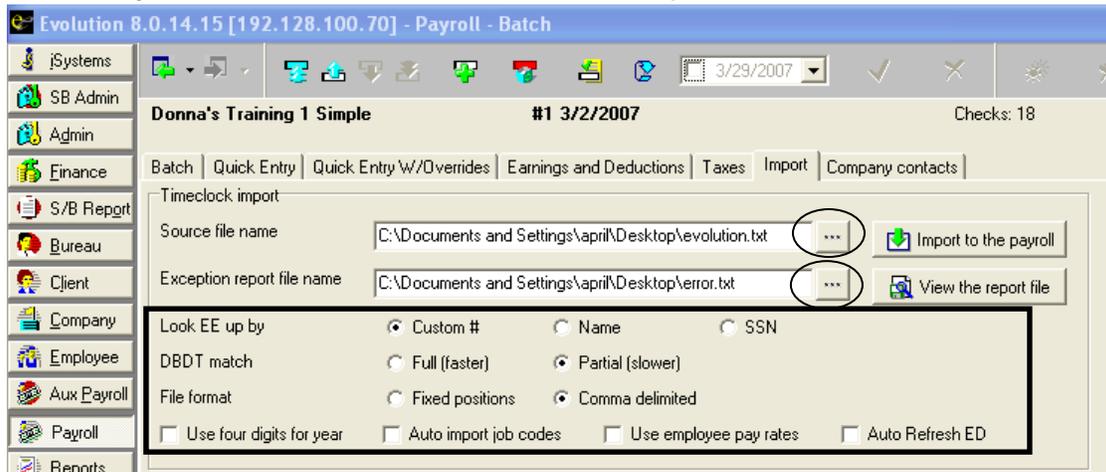| Beginning and Ending Date	⦿ 3/8/2009 thru 3/21/2009 ◯ 2/22/2009 thru 3/7/2009 ◯ 2/8/2009 thru 2/21/2009 _Click here for more pay periods_
Report Options	☑ Show Wages & Dollar Amounts ☐ Show Week Breakdown ❷ ☐ Show Approval Signature Line ❷
Show Which Employee Fields?	Employee Name ☐ Employee Code ☐ Home Department ☐ Home Location ☐ Card Number 1 ☐ SSN
Sorting and Filtering	Sort By: [Employee Name ▾] Filter By: [No filter - Show ALL employees ▾]

[Run Report]

Payroll Summary

Online Demo
2/22/2009 through 3/7/2009

🔺 This symbol means employee is missing one or more punches.

#	Name	Total Hrs	Category	Pay Rate	Pay	Job Code
1	Abbott, Cassandra	79.41	Regular	2.13	169.14	0
		1.14	Overtime	3.20	3.64	
2	Arnot, Josh	56.98	Regular		0.00	0
3	Ashby, Erin	56.98	Regular	2.00	113.96	0
4	Bailey, Donald	79.45	Regular		0.00	1280
		0.51	Overtime		0.00	
5	Bailis, Janet	73.47	Regular	11.00	808.17	0
		3.01	Overtime	16.50	49.67	
6	Behrend, Steven	40.00	Regular	0.18	7.20	0
		40.00	Regular	0.30	12.00	
		3.00	Overtime	0.27	0.81	
		1.96	Overtime	0.45	0.88	
7	Blanton, Roberts	80.00	Regular	5.15	412.00	0
		4.96	Overtime	7.73	38.32	
8	Brown, Bryce	22.47	Regular	8.50	191.00	0
9 🔺	Manning, Daniel	51.40	Regular		0.00	0
Totals		**594.74**			**$1,806.79**	**1280**

Category	Total Hours	Total Pay
Regular	580.16	$1,713.47
Overtime	14.58	$93.32
TOTALS	**594.74**	**$1,806.79**

PAYDAY INC.
Unique Payroll Solutions
25 YEARS

18. Your report will come up.
    a. You should not have any missing punches.
        i. If you do have missing punches you must fix these before you can go on with your payroll.
    b. The report will show you the totals for each E/D
19. Print this report so check totals once you have done your import.
20. **Download Activity Files**   Select Download Activity Files from the list of reports.
21. Select Custom at the bottom of the page and type in evolutioncomma in the box available.
22. Select Continue

File Format Code:	
Select A Pay Period:	Select the pay period you are paying your employee's for
File Processing:	Select Download It
Employee Filtering:	No Filtering
Options:	Do not select anything here.
Labor Mapping:	All options should say Nothing.

Notes:_____
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23. Make your selections as shown above.
24. Select Run Report
25. Select Save from the box that pop's up.

File Download - Security Warning

Do you want to save this file, or find a program online to open it?

Name: evolutioncomma
Type: Unknown File Type, 1.15KB
From: www.swipeclock.com

Find   Save   Cancel

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not find a program to open this file or save this file. What's the risk?

Save As

Save in: My Documents

My eBooks
My Music
My Pictures
My Received Files
DESKTOP.INI

File name: yournamingconvention.TXT
Save as type: Document

26. You will now select where you will save your file. It is important that whatever you name your file it has **.txt** after the name. Once the file exists, you can double-click the existing file to overwrite it.

27. Go to Payroll Batch in Evolution. Select the Import Tab

28. Click on the three little dots on the Source file name line to select where your file was saved.
29. Click on the three little dots on the Exception report file name. This should be a notepad saved with an ending of **.txt**
30. The area below these lines should look as they do above.
31. Now you can select the Import to the payroll button. A task bar will pop up until this is finished.
32. The yellow Sun shows that data did come in during your import. Do not hit the yellow sun until you are sure you are ready to save.
33. Click on the View the report file button.
    a. This will bring up an error log. If there is anything on this log you may need to correct the problem and then recreate your file and re-import.
    b. The hours and earnings for anyone rejected on the report will not have been imported. (If you must make corrections do not save what you have done in Evolution. If you have saved you may need to delete the batch and recreate it.)
34. Check your totals by selecting the Earnings and Deductions Tab.
    a. Any Codes that require the check to be calculated for the amount to show will not show accurately until you do your pre process.
    b. Make sure that the totals look correct from the report you ran out of the Net Clock and then you can save your import.
35. Select the Quick Entry Tab
36. Select the Pre Process Payroll Button at the bottom of the page.

37. This calculated all of your checks.
    a. Any checks that <u>did not</u> have any earnings will fall out of the payroll.
38. At the bottom of the page the status of the pre process can be seen.

Task Queue: New Finished: 1 Total: 6 Finished: 6   When the total amount and the finished amount match the pre process is done running.
39. Select the small View button located below the Exit to enter the Queue.
    a. This is where you can see if your pre process ran successfully.
    b. If your pre process ran with any errors call your CSR.

40. Once your pre process has run successfully you can run reports to check your payroll before submitting it.
41. Select the Favorite Reports Button at the top of the screen.
42. The Favorite Reports will pop up.
43. Select the Payroll Register Report by clicking in the box beside the name.
44. Select the Details Tab
45. Select Preview
46. Select Last Waiting Payroll
47. Uncheck the Run through the Queue box.
48. Select the Run Reports Button.
49. The report will run and come up on your screen.
50. You can either print or save your report from here.
51. Review the report for any errors in the payroll.
52. If you need to make any corrections in your payroll before you submit
    a. Select the Payroll Button, then Payroll Tab
    b. Select the Check Date that you are working in.
    c. Select the **Batch Button** at the bottom of the page.
    d. If you only have one Batch open it will take you straight into the Quick Entry tab for your Batch
    e. If you have more than one Batch in your payroll select the batch that you need to enter from the Batch Tab, and then the Quick Entry Tab.
    f. Enter your corrections
    g. Re-run your Pre Process and Payroll Register Report.
53. Once you are sure that your payroll is correct and ready to be submitted. Select the Payroll Button, then Payroll Tab
54. Select the check date you are working on.
55. Select the SB Review Button
56. The System will ask:
    a. This will make everything in the system go gray so that you will not be able to enter or do anything until your payroll has been processed.
    b. Select OK
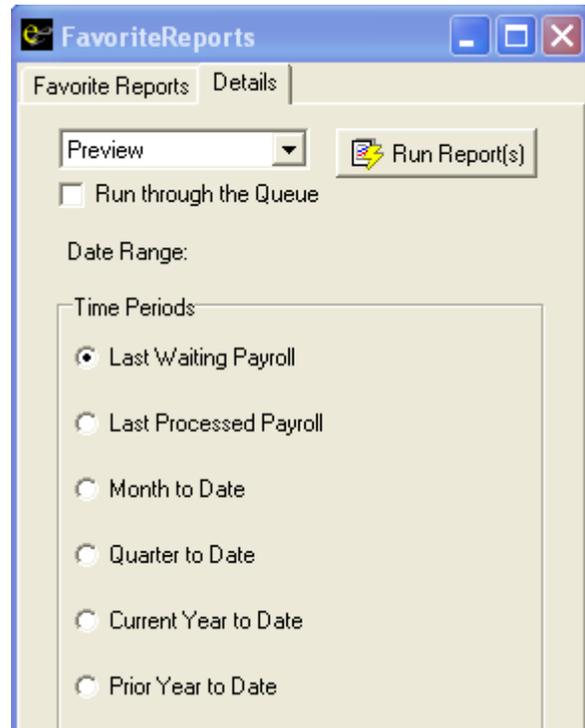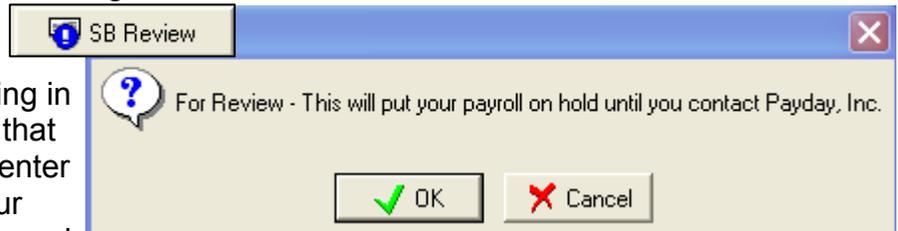
57. The system will pop up:
    a. This will allow you to email your payroll contact to let them know that your payroll is done and note anything that you would like them to look over for you.
    b. It is very important that you contact your CSR to let them know you are done, and to note anything that you want them to check. If you do not want to email them then call.
    c. Your payroll will be on Hold until the payroll has been processed. Once the Status changes to P you will be able to make changes in the system.

Reports

Running Reports

1. Select the Reports Button
2. Select the Run Reports Subfolder
3. Select the report that you would like to run from the list of reports on the right side of the page.
   a. Select in the box next to the report to put a check mark in the box
4. Select the Report Parameters Tab at the top of the page.

5. The parameters will be different depending on the report that you are running.
6. The Payroll Register Report is a standard report for what is available in the parameters tab.

   a. Select the check date or dates in the Payrolls Tab.
      i. The Select Payrolls for box will allow you to select check dates for 1st, 2nd 3rd, and/or 4th quarter. It also allows you to select check dates for the entire year.
      ii. You can change the year under the check date period.
      iii. If you are looking for payrolls in a specific time frame you can enter the time from in the From and To boxes under the check date period.
         1. You can then select all of the date in the period by selecting the box next to the filter.
   b. Select the Misc Tab

☐ Page Break after each Group	
☑ Show Terminated Employees	
☑ Mask Sensitive Information	
☐ Show only Summary for Multiple check dates	
☑ Show Home DBDT for each Employee	
☑ Include Memos in Totals	
☑ Include Taxable Memos in Totals	
☑ Include Pieces from Piecework in Totals	
☑ Break Employee between Pages	
☑ Deductions as Taxes	
☐ Show Shift Differentials	
☐ Hide SSN, State, Frequency, and Salary	
☐ Swap Check Date and Net Check	
☐ Bold EE Name, Check Number, and Net Check	
☐ Show Employees With YTD Earnings	

Under the Grouping and Sorting Box

1. The Group Level allows you to select how you want the grouping to be (Company or Department)
2. The Group Type allows you to select
   a. Summary Detail – This is totals and the detail of each check.
   b. Summary – just the totals
   c. Detail – just the detail of each check
3. The Group Sort allows you to show your first Group Level either by Department Code or Name
4. The Detail Sort affects the detail of information within the group
   a. Your employee's can be in order by
      i. EE Last Name
      ii. EE SSN
      iii. EE Code
      ii. The Check Boxes at the right of the page allow you to customize the report even further.

1. Page break after each group - allows a break to the next page after each department.
2. Show terminated employee's – employee's that are terminated in the system, but were paid during the time frame that you are looking at will show on the report.
3. Mask Sensitive Information – Social Security Numbers will be shown as X's
4. Show only Summary for Multiple Check Dates – if you do not need the detail of every check for each employee… this will allow you to see a summary for multiple check dates.
5. Show Home DBDT for each Employee – will show the employee's home DBDT on the report.
6. Include Memo's in totals – if you have memo's they will show in the total's
7. Include Taxable Memo's in the total's – if you have taxable memo's they will show in the total's
8. Include Pieces from Piecework in Totals – if you have Piecework you can have pieces show in the totals
9. Break Employee between pages – will print part of employee's information on one page and break when runs out of room and finish on next page (can be hard to read report with this function)
10. Deductions as Taxed – deductions are showing in order as they are taxed.
11. Show Shift Differentials – if you have shift differentials you can have it show.
12. Hide SSN, State, Frequency, and Salary- gray line on this report normally will show the EE's SSN, State, Freq., and Salary. If you select this it will be just a gray line.
13. Swap Check Date and Net Check – switches location of these items
14. Bold EE Name, Check Number, and Net Check – will make these items bolded
15. Show Employee's with YTD Earnings – will show employee's with YTD Earnings.

       iii. Select Employee Filter Tab
1. This Tab will allow you to run this report for just one or a select group of employee's.
    a. An example of how this report could be used:
       i. An employee comes to you needing check information for the last 3 check dates. (Employee is refinancing home, and shredded check stubs already.)
1. Select Payroll Register report
2. Select check dates employee needs
3. Select Employee from list
4. Run and Print Out for Employee
2. If no employee's are selected in this tab the report will run for all employee's.
       iv. Select DBDT Filter Tab
1. This Tab will allow you to run this report for just one or a select few Division's, Branches, Departments, and/or Teams.
2. If no specific DBDT's are selected the report will run for all.
       v. From the Drop Box at the Right Select Preview
1. You can select to print, but this does not allow you to preview the report before it begins to print.

       vi. Make sure the Run through the Queue has a check mark in the box. This will send your report to the Queue (your report will be available in the Queue for 10 days)
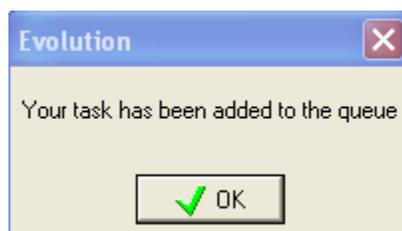
       vii. Select Run Report(s) Button
       viii. You will get a pop up message to let you know that the report has been added to the Queue.
       ix. Close out of the Report area with the red at the top of the page.

7. At the bottom of the page you will see the Task Queue

Task Queue: New Finished: 7 Total: 18 Finished: 18

a. You will want to wait until the Total number and Finished numbers are the same.
b. When the report is finished running select the View Button located under the Exit at the lower left corner of the screen.

Quick Guide
Running a Report

1. Select Report Button
2. Select Run Reports Subfolder
3. Select Report that you would like to run.
4. Select Report Parameters Tab
5. Select Parameters (If Applicable)
6. Select to Preview the Report
7. Select Run through the Queue box
8. Select Run Report Button
9. Wait until Report shows it has run in the Task Queue at the bottom of the page.
10. Select the View Button under the Exit Button
11. You can now see and do what you need with the Report that you have run.

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Navigating in the Queue

1. The Queue is the area of Evolution that hold all of your previous preprocess and reports that you have run and asked to have run through the Queue. The information in the Queue is available for 10 days.
2. Note: Depending on each user's rights the Queue may have some differences in functionality. Usually User's will only see a difference in if the Queued area is available.
3. The top portion of the Queue has these buttons:
    c. The double up arrow allows you to go to the first page of the report that you are looking at.
    d. The single up arrow will scroll up.
    e. The single down arrow will scroll down.
    f. The double down arrow will take you to the last page of the report you are looking at.
    g. The arrow going in a circle is the refresh button. You may have to refresh if you come into the Queue and your report is not done running.
4. Below the arrow buttons is the list of reports that you have run for the past ten days, and the Queued list.
    a. The list of reports shows the date, status, description, and other information about the report.
    b. The Queued list show the status on the reports that you have run.

User	Finished	Priority	Id	Updated	Status	Description	Caption		Queued		Finished	8
AW152	☑	800	60014	3/19/2009 11:02:27 ...	Finished Successfully	Task Run Report	Scheduling Rep		Waiting for Res.		Finished succ.	8
AW152	☑	800	59829	3/19/2009 8:26:54 AM	Finished Successfully	Task Run Report	CO# AB201M. (		Executing		Finished w/excep.	
AW152	☑	795	59542	3/18/2009 3:19:29 PM	Finished Successfully	Task Preprocess Payrolls	Co:N092+ Pr:3/		Failed		Finished w/warn.	
AW152	☑	795	59463	3/18/2009 2:39:23 PM	Finished Successfully	Task Preprocess Payrolls	Co:N040+ Pr:3/		Priority()			
AW152	☑	795	58058	3/17/2009 9:18:28 AM	Finished Successfully	Task Preprocess Payrolls	Co:D221+ Pr:3/		Total tasks	8		

Personal | All

5. Below the lists is the description of the report that you are viewing.

Description:	Task Run Report
Caption:	CO# AB201M. 05 - Payroll Register
Status:	**Finished Successfully** Changed: 3/19/2009 8:26:54 AM
Message:	
☐ Send Updates to April@Paydayinc.Com	NI

6. The icons below the description allow you to affect the report you are viewing.

    a. 💾 Allows you to save the report outside of Evolution. Make sure if you are saving so that you can email or make available to someone who does not have Evolution on their computer that you change the type of the report to Adobe PDF Format

    b. 💾 Allows you to save your report outside of Evolution. See above… Allows you to save reports that you ran at the same time as separate files.

    c. 🔑 Allows you to password protect your report before saving it outside of Evolution. Allows one or two passwords.

    d. 🖨 Prints the report to your default printer

    e. 🖨 Allows you to select the printer and parameters for the printer you selected to print to.

f. Allows you to zoom in and out to see more or less of your report.

g. Allows you to search through the report.

h. Allows you to create circles that you can attach text to.

i. Allows you to scroll through the report.

j. Page | 1 of 23 | Shows what page of the report you are viewing

k. Report | All Graphic Reports | ▼ | If you ran more than one report at the same time this allows you to select which report you want to view.

7. Below the icons you will see your report.
8. On the right top part of the Queue there are 4 Tabs available. These will change the view.
   List View | Split View | Detail View | Full Screen
   a. The List View allows you to see just the list of report you have run in the past 10 days.
   b. The Split View is the default view it allows you to see the list, description of report and all the icons.
   c. The Detail View will eliminate the list and leave all other functions
   d. The Full Screen takes away the list and detail leaving you with just the report and icon buttons that will affect the list above and the icon buttons that affect the report.
9. These steps walk you through running the payroll register report. This is a good example of the different parameters that are available when running reports. If you ever find that you have a question about a parameter that is available with a specific report call your CSR for further guidance.

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Running Reports from Favorite Reports Button

1. Select the Favorite Reports Button
2. Select the Report(s) you would like to run
3. Select the Detail's Tab
4. Select if you would like to Print or Preview the report.
    a. If you select Print it will print as soon as the report is done running
    b. If you select Preview it will allow you to preview the report.
5. Select if you would like the report to run through the Queue.
    a. If you select to run through the Queue you will need to go into the Queue to view your preview.
    b. If you do not select to run through the Queue if you selected preview it will come up on your screen.
    c. Reports run through the Queue are available for the next 14 days.
6. Select the Date Range that you would like to use to run the report(s)
7. Select the Run Report(s) Button
8. Your report(s) will run.

Saving a Report as a PDF

1. Select the Reports Button/ Run Reports Subfolder
2. Select the report that you want to run from the list of reports. Put a check mark in the box beside the report.
3. Select the Report Parameters from the top of the page. `Browse | Report Parameters`
4. Select the Parameters for the report that you are running.
5. Select Preview from the drop box at the top right part of the page.
6. Make sure that the run through the Queue has a check mark in the box beside it.
7. Select Run Report
8. A pop up box will let you know that the report has been added to the Queue.
9. When the report has finished running. (You can see the status of the report at the bottom of the page. `View | Task Queue: New Finished: 4 Total: 12 Finished: 12`
10. To enter the Queue Select the small View button below the Exit button. Select the save button
11. The Save Report Writer ⊟ ult file will pop up.
12. Select where you would like to save the report and what you would like to name the report.
13. Select the Save as type and select PDF File
14. Select the Save button.
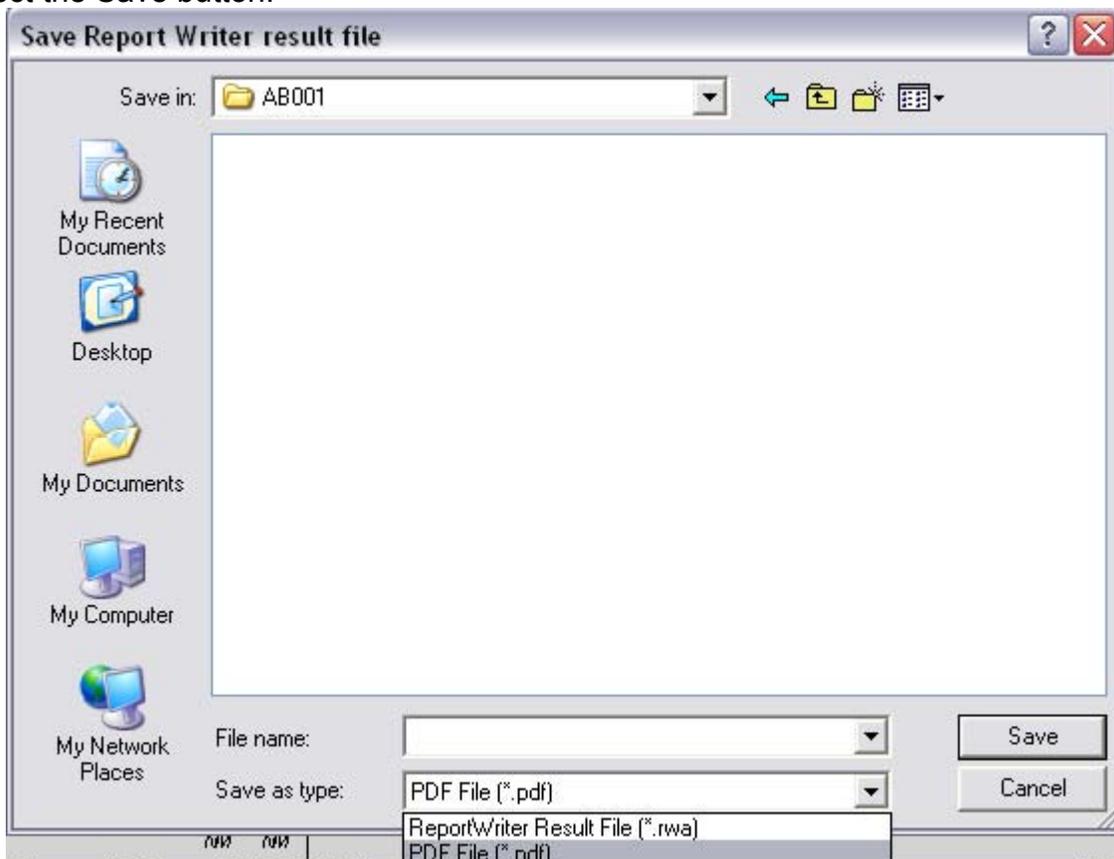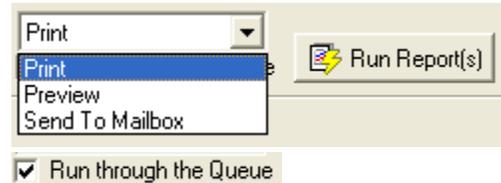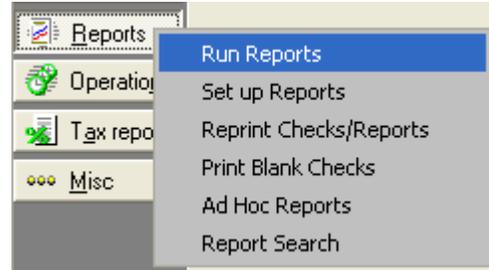
Ascii File Open in Excel

1. Once you have run your Ascii report in Evolution go to the Queue to save outside of Evolution.
2. From the Queue select the Save Icon. 🖫
3. This will bring up your Save Box.
   a. Save to the location that you would like the file to go to.
   b. Name the file
   c. The file will be a text file.
4. Open Excel
5. Select your open file
6. In the Open Pop up Box select where All Files so that you will be able to see your text file where you saved it.
7. Double Click on the text file you created.

Original data type

Choose the file type that best describes your data:

◯ Delimited   - Characters such as commas or tabs separate each field.
◉ Fixed width - Fields are aligned in columns with spaces between each field.

8. This will open the Text Import Wizard
9. Select Delimited then Next

| Cancel | < Back | Next > | Finish |
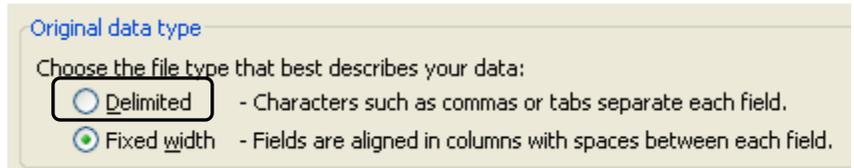
10. Select Semicolon and Comma. Uncheck Tab then select Next.

| Cancel | < Back | Next > | Finish |

Delimiters

☐ Tab
☑ Semicolon
☑ Comma
☐ Space
☐ Other: [   ]
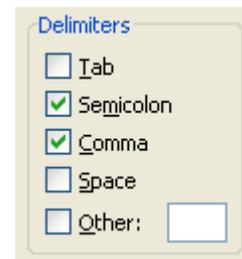
11. Leave General selected and select Finish

Column data format

◉ General
◯ Text
◯ Date: [MDY ▼]
◯ Do not import column (skip)

| Cancel | < Back | Next > | Finish |
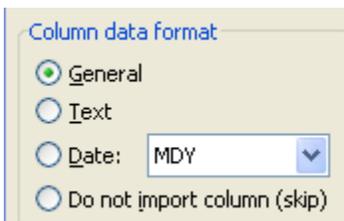
12. This will bring the information into Excel.

Notes:_____

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Re-Printing Check Stubs

1. Go to Reports – Reprint Checks/Reports

2. From the Browse Tab change the Check Form and Misc Check Form to show Check Letter Stub Only (New)
3. The Destination needs to be Print
4. Select the check date that you need to reprint the check stub for in the list below
5. In the Payroll Check Tab Select the check (if you need more than one check hold your CTRL Key on your keyboard) needed. Hit your Plus Sign at the top of the page.

6. This box will pop up Select Yes
7. You will be notified that it has been sent to the Queue select OK
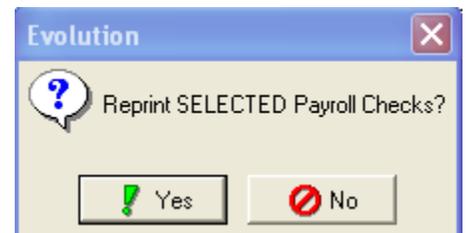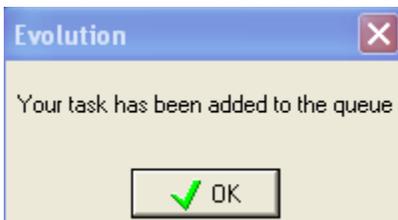
8. Once it has finished running in the task Queue (status seen at the bottom of your page) you may enter the Queue by selecting the View Button under the Exit button
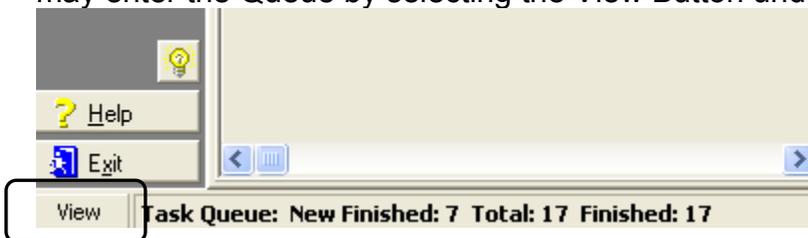
9. You can reprint the check stubs by select the reprint checks button at the bottom of the Queue

Ad Hoc Reports

1. When using Ad Hoc Reports you will be manipulating information that is specific to your company. There are many areas in Ad Hoc where you will need to spend time becoming familiar with what is available to you based on how your company is set up in the Evolution system.
2. To navigate to the Ad Hoc Reports you will select the Reports side button.
3. You will then select the Ad Hoc Reports sub folder
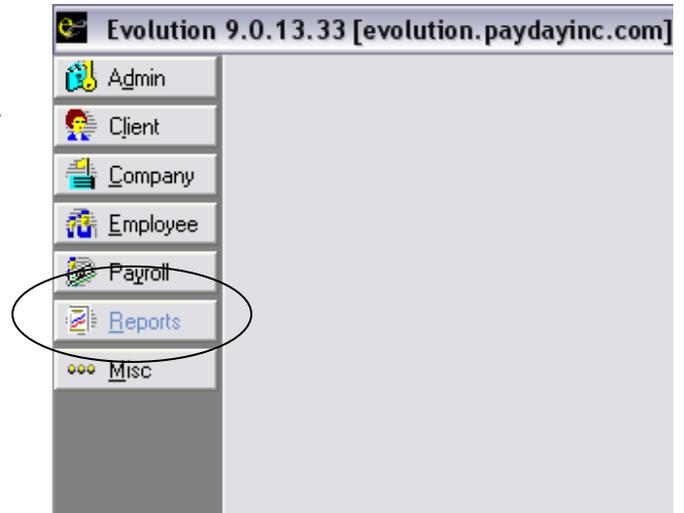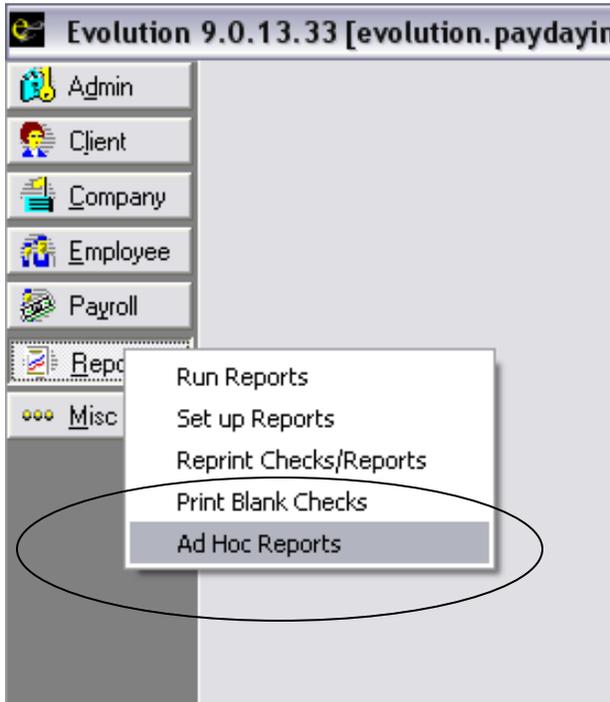
4. Now while in your company you will select the green plus sign at the top of your Navigational Bar. If not automatically directed to the details tab select the details tab.
5. Enter in the title of your report in the Description box
6. You will select the type of report that you are creating from the report drop box, and this will allow you different information to pull from. If you are creating a report that will just have employee information and not need any payroll dates or information you can select Employee. If you are creating a report that is going to need any Payroll information you will need to select Payroll.

7. Select the Reports Parameters button

8. If creating a report using the Employee information you will have Columns, Select EE's, and Misc. as tabs where you can manipulate and pull information for your report.

9. If creating a report using Payroll Information you will have Misc., Employee Filter, DBDT Filter, Columns, and ASCII Report available as tabs where you can manipulate and pull information for your report.

10. At this point you will have information available depending on how your company is set up in Evolution. Below you will find some navigating information to help you in creating your report.
11. **The Columns Tab** you can add and delete columns that will show up on your report. You are also able to move the columns to put them in the order you want them to be.
12. With the Column Type you will be selecting what kind of information you will be pulling from Evolution. By selecting Employee you are shown information about the Employee in the Columns Values.
13. With the Column Title you are naming the Column what you want it to be called on your report.
14. You are able to make the columns you create visible or invisible (if you need information for a calculation, but you do not need it to be visible on the report). If you are doing a calculation you will have to select Calculation from the Column Type(when calculating a column enter the Column number then the calculation method and then the other Column. For instance col1+col3)

Add and Delete Columns. Move the Columns you have created to where you want them located on the report.

This is where you select the type of Column you are creating and the details of that column

This is where you select the information that you want to include in your column

Apply your changes
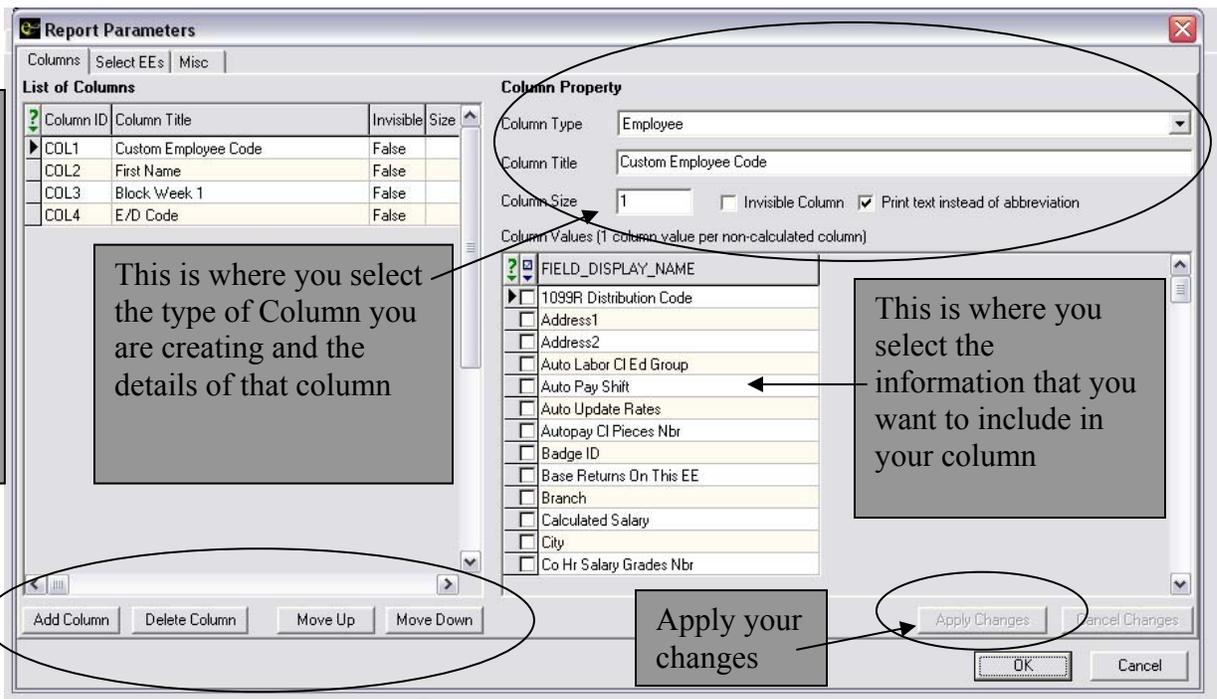
15. You are able to select the size of the column.
16. The Column Values area is where you select what is show in the column you are creating.

17. Once you have created and manipulated all of the columns to where you want them select the Apply Button.
18. **In the Select EE's Tab or the Employee Filter Tab** allows you to select specific employees for the report. Note: this will be available when you tell Evolution to run the report it does not need to be set while building the report.

19. **In the Misc. Tab** you are given the option to pick what kind of employees will show on the report. Active, Terminated, Inactive, etc. You are also able to select depending on if the report is being created through Employee, or Payroll more information

Employee

Payroll

20. **The DBDT Filter Tab** allows you to select specific departments that will show on the report. You will select how you want to specify (Company, Division, Branch, Department, Team)
21. **The ASCII Report Tab** allows you to set your print parameters and report specifics.

22. Once you have created your report you will want to save by hitting the green check mark on the top navigational bar, then the yellow sun.
23. Now you can run your report. In the browse area of the Ad Hoc Reports you will now see your report. Select the report and make sure there is a check mark in the run through the queue, then select run report.

24. Choose the reports parameters. You can make any changes you want to the report. Save, and then select ok. A box will pop up notifying you that your report has been added to the Queue. You can go to the Queue to view and print your report.

Running a Query

1. Queries are a type of report that can be exported to Excel.
2. Clients can have a Query emailed to them so that they can run the Query.
3. To run a Query select the Misc. button, then the Query Builder Subfolder.
4. Select Open Existing Query.
5. Select where you have the Query Saved.
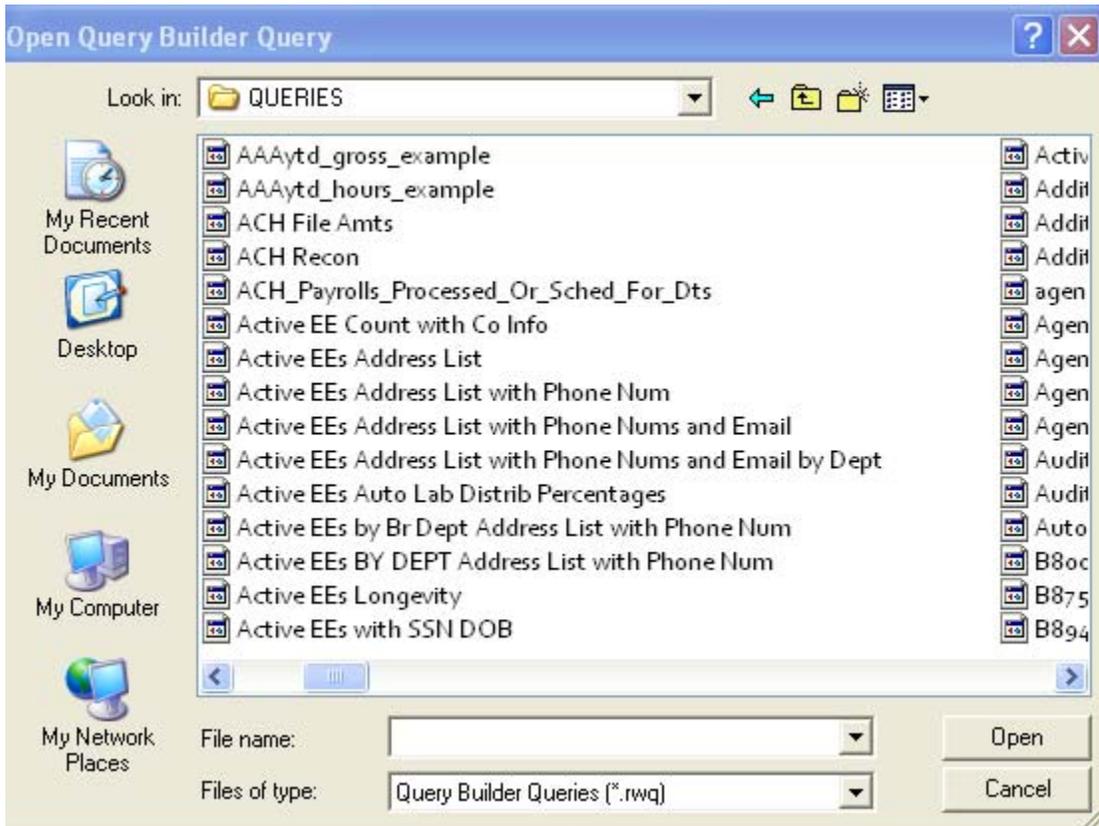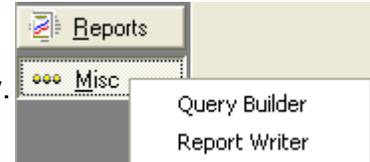
6. Double Click on the Query you want to run.
7. The report will run and show the results in Evolution.
8. To Export the results to Excel select the Export Result To Excel Button.

9. Select where you would like the report to be saved to.
10. Go to where you saved the file and double click on the file to open. The file will be a SYLK file, but you can save as an excel file once you have gone into the file by selecting file/ save as.

Creating a Basic Query

1. The Query area of Evolution allows you to pull information out of the system.
   a. The Query area pulls the information based on where it is located in Evolution and where that information is link to in the tables that are in the Query area.
   b. The best way to locate the information you are looking for in the Query Building is by knowing what fields you are going to want to pull and going to those specific areas in Evolution.
      i. Select the field of information that you are going to be pulling into the Query and select the Field Audit History Button from the top navigational bar. This will show you where in the Query Tables the information will be found.
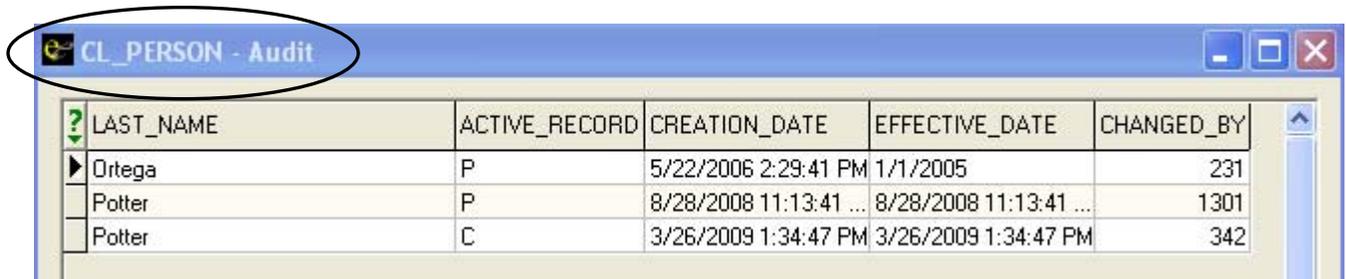
   c. Once you have noted all of the information that you want to pull and where in the tables that information will be found you can go to the Query Building area.
2. Go to Misc Button Query Builder Subfolder.
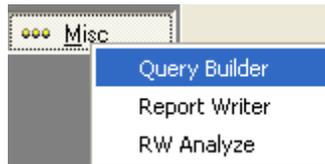
3. Select the Create New Query Button from the Queries Tab.
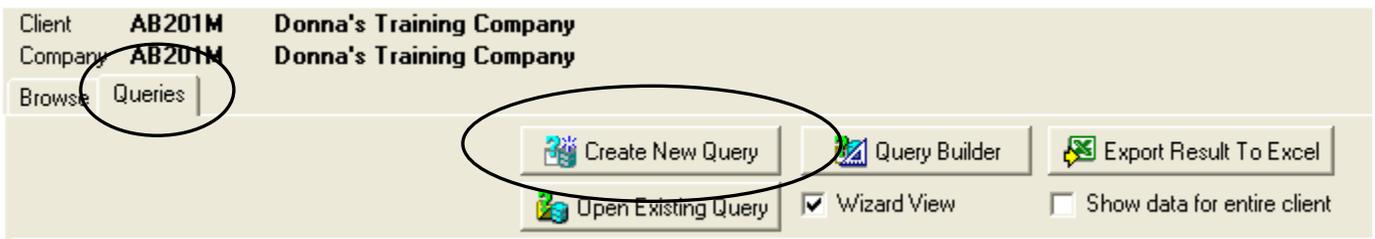
4. From the list of Tables grab the table where the field of information that you need is located and drag it into the top gray area of the screen.

5. As you drag different tables to the middle the Query Builder will create links between the tables.

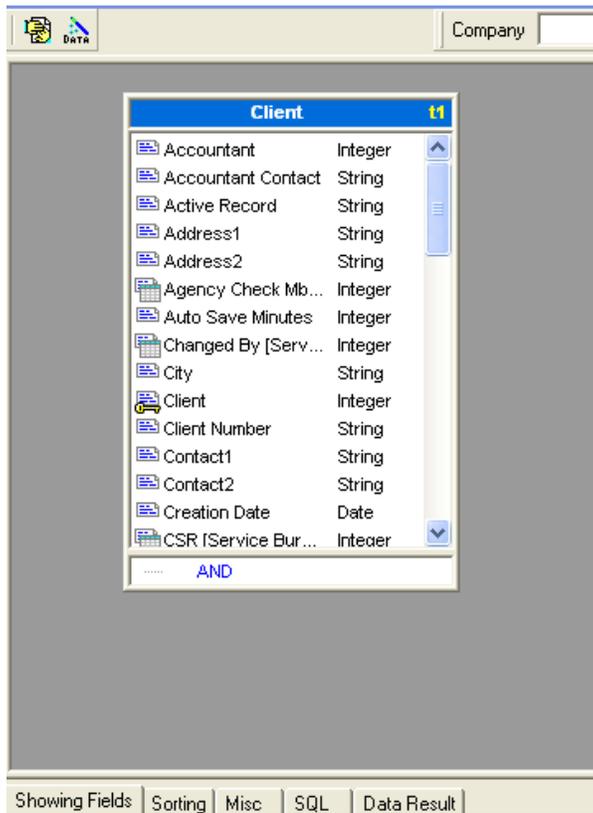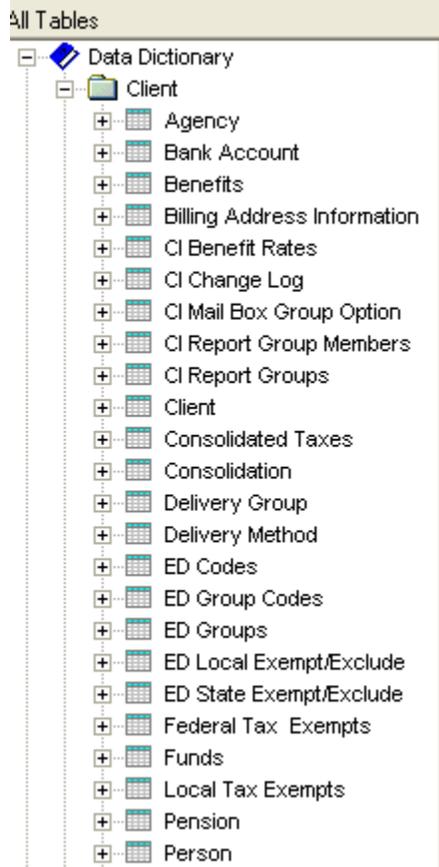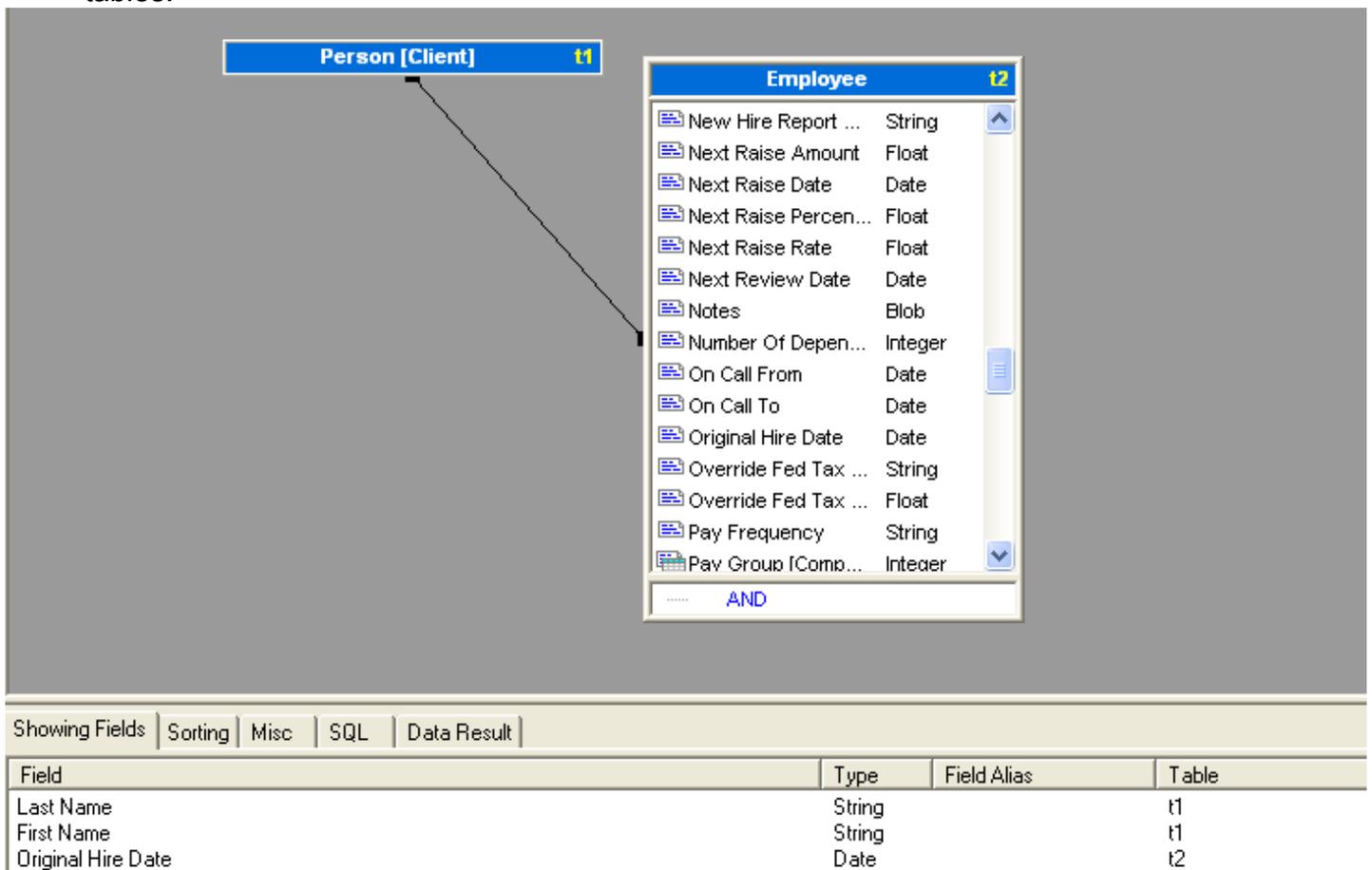6. By selecting a field and dragging it down to the bottom of the table where it say's and you will get a condition constructor box. You can select the compare operation, and then enter information based on what you are comparing.

Condition Constructor

Left Part
Expression
t2.Original Hire Date

Compare Operation
BETWEEN

☐ Inverse compare result (NOT)

Right Part
Initial Expression
'01/01/2009'

Final Expression
'06/30/2009'

AND

Check   OK   Cancel
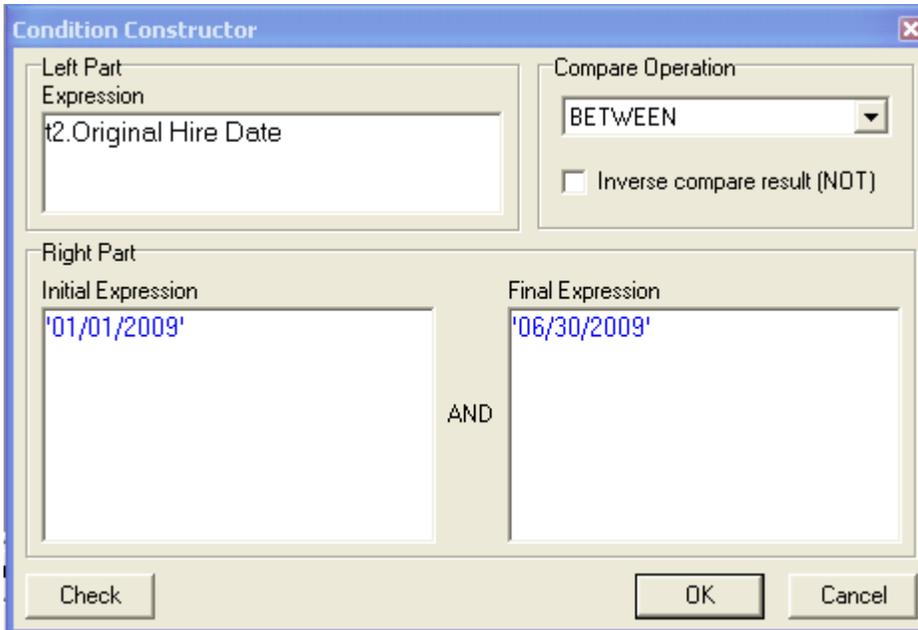
7. Once you have entered all the fields and conditions that you want in your Query select the run button. ⚡?

8. Sorting can be done by going to the Sorting Tab at the bottom of the page. Right Click and select Add.

Sorting | Misc | SQL | Data Result |

Add...   Ins
Edit...   Enter
Remove Field Del

Sort Field Editor
Showing Field
Last Name

Sort Direction
⦿ Ascend   ○ Descend

OK   Cancel
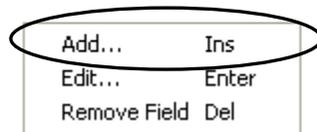
9. By selecting the add in the sorting you will see a sort field editor pop up. Select the field that you would like to sort by first and then the order to sort by. You can continue to add sorting until you are satisfied with the results.
    a. You will need to re run the Query results to see the changes

10. You can save your Query to a file by selecting the floppy disk icon. 💾

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PAYDAY INC.
25 YEARS

Other

Buttons Within Evolution

1. Located in the Employee/Employee screen

    a. Check Finder [icon] When you select this button it takes you to the check finder. The check finder will show you checks for the dates you select for the employee that you are on when you select the check finder.
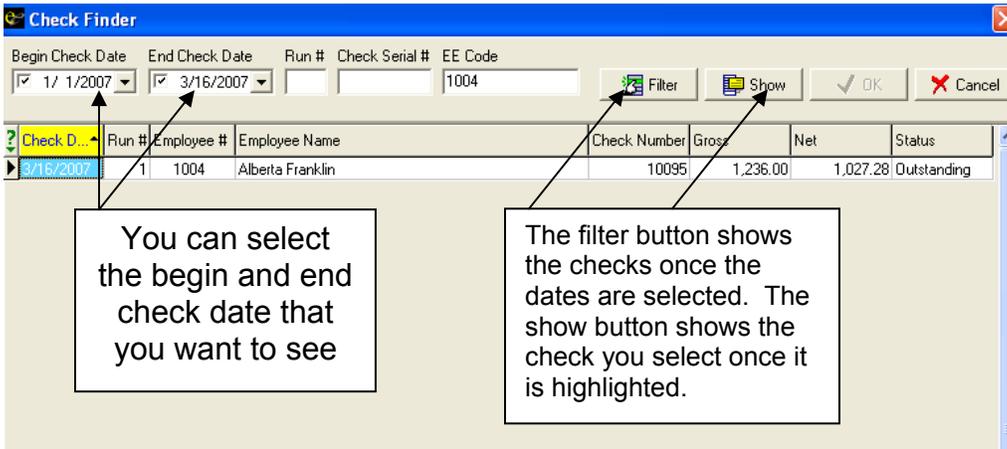
You can select the begin and end check date that you want to see

The filter button shows the checks once the dates are selected. The show button shows the check you select once it is highlighted.

    b. Tax & Check line Calculator [icon] When the Tax & Check line Calculator is selected it taken you to a calculator for the employee that you are currently in.

Enter the E/D's

While in the Tax Calculator you can select the Earnings or Deductions that you need to be in the check. Then enter the amount for those E/D's. You can select how the taxes are to be handled. You can even Gross up a check by check the Net to Gross box and putting in the Net Amount.
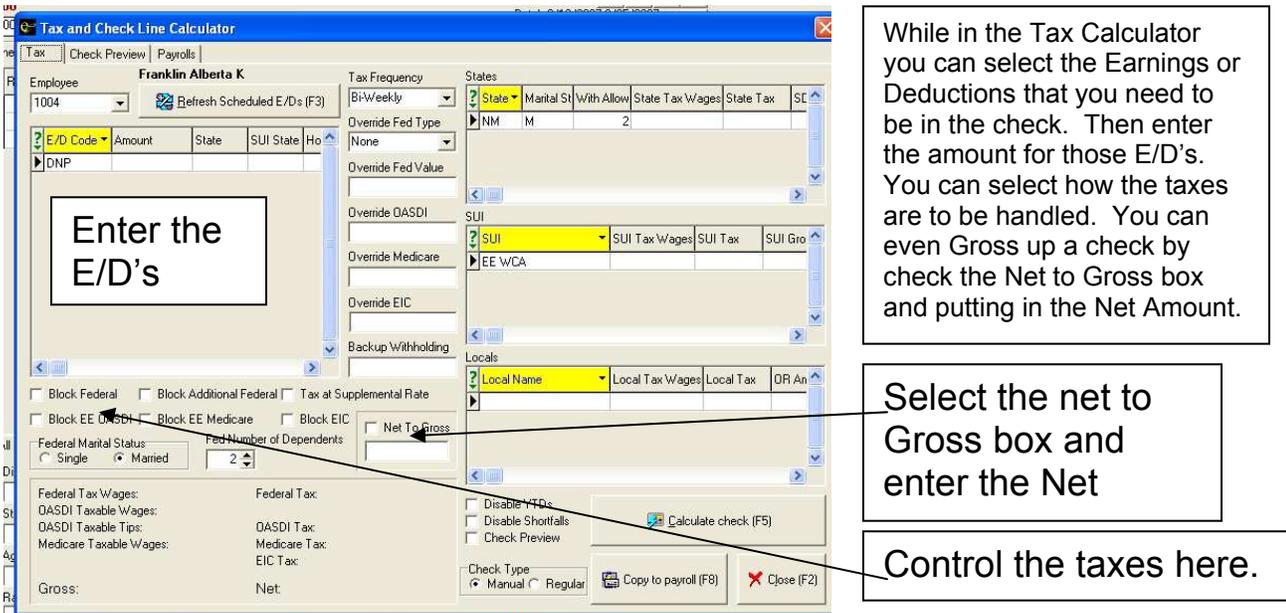
Select the net to Gross box and enter the Net

Control the taxes here.

2. Located within Payroll/ Quick Entry area in Evolution.

    a. Employee   The Employee Button takes you to the Employee/Employee area of Evolution.

    b. Employee Rates   The Employee Rates Button takes you to Employee/ Pay rate info screen.

3. Located within Payroll/ Check-line area in Evolution.

    a. Employee Button   The Employee Button takes you to the Employee/Employee area of Evolution.

    b. Employee Rates   The Employee Rates Button takes you to Employee/ Pay rate info screen.

    c. Scheduled E/D's   . The Scheduled E/D's button takes you to the Employee/ Scheduled E/D's area.

    d. Check Finder   When you select this button it takes you to the check finder.

    e. Tax & Check line Calculator   When the Tax & Check line Calculator is selected it taken you to a calculator for the employee that you are currently in.
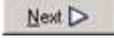
Evolution Shortcut Keys

General

Action	Button	Shortcut Key
Check Finder		F12
Moves the insertion point from tab to tab on a window	N/A	CTRL+TAB
Show contents of drop-down menu	N/A	ALT+DOWN ARROW
Tax Calculator		F9
Field Value Locator	N/A	CTRL+ F
Field Filter		CTRL+ R
Change to menu item	N/A	ALT+ _
Export "Grid" within Evolution	N/A	CTRL+E

Employee & Payroll

Action	Button	Shortcut Key
Select employee by name	N/A	CTRL+ F12
Select employee by number	N/A	CTRL+ F11
Move to next employee and save changes to current employee	Next ▷	PLUS SIGN (+)
Move to previous employee and save current employee changes	◁ Prior	Asterisk (*)
Get Employee YTDs	N/A	F3
Move insertion point to the first employee	N/A	ALT+HOME
Move insertion point to the last employee	N/A	ALT+ END
Create a new employee/check	N/A	ALT+ INSERT
Move from employee details tab to the browse tab of that employee's scheduled E/D/s window.	EE Scheduled ED's	N/A
Move from the employee's scheduled E/D window to the browse tab of the Employee window.	Employee	N/A

Payroll

Action	Shortcut Key
Move from Payroll- Batch window	CTRL+ ALT+ LEFT ARROW
Move from Payroll-Checks window	CTRL+ ALT+ RIGHT ARROW
Create a Payroll or Batch	ALT+ INSERT then F10

Payroll- Payroll-Batch/Checks

Action	Shortcut Key
Delete a check	CTRL+DELETE
Add a check	INSERT or DOWN ARROW
Move to check lines	CTRL+ ENTER
Move back to check	CTRL+ ALT + LEFT ARROW

Payroll- Payroll- Check lines

Action	Shortcut Key
Add a check- line	INSERT
Add a check	- DOWN ARROW - ALT+ INSERT
Delete a check	ALT+ DELETE
	PLUS SIGN (+) DOWN ARROW
Move to Quick Entry	CTRL+ ALT+ LEFT ARROW
Add Copy of check line	CTRL+D

Toolbar

Action	Button	Shortcut Key
Back to previously viewed window		SHIFT+ALT+ LEFT ARROW
Forward to next viewed window		SHIFT+ALT+ RIGHT ARROW
First record		ALT+ HOME
Prior record		CTRL+ ALT+ LEFT ARROW
Next record		CTRL+ ALT + RIGHT ARROW
Last record		ALT+ END
Create a record		ALT+ INSERT
Delete a record		ALT+ DEL
View field audit history		CTRL+ H
Refresh data		F5
Post changes		F10
Cancel changes		F2
Commit data changes to database on server		CTRL+ S
Abort changes		SHIFT+ ALT+ BACKSPACE

Payroll Filters

1. You may want to add a Payroll Filter to your company for instances when you have more than one batch in your payroll. Creating a Payroll Filter will allow you to identify the batch's in your payroll. For instance you may want to create a batch with manual checks in it. You could use a filter called manual checks to identify that Batch.
2. To add a Payroll Filter to your Company go to the Company side Button
3. Now you will want to select the Payroll Defaults Subfolder. Then select Payroll Filters.
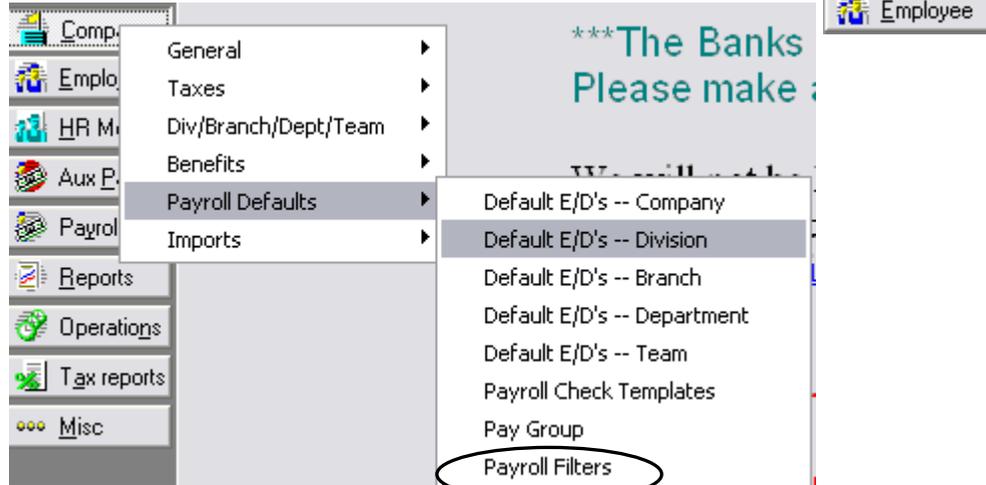
4. Select the Detail Tab at the top of the page.
5. Select the green plus sign

6. Enter the name of the Filter that you are creating on the Name line at the bottom of the page.

Name	Division	Branch	Department	Team	Pay Group
Pay Filter 2	APS	1	2		EEs With Green Eyes
Payroll Filter	APS	1	1		EEs With Blue Eyes

Name Manual Checks
Division
Branch
Department
Team
PayGroup

7. Select the green check mark and then the Yellow Sun to save your work.
8. If you want to specify only a specific Division/Branch/Department/Team or Pay Group to come into the payroll you can do so by selecting from the drop boxes below the Filter Name.
9. If you have any questions while creating a Filter contact your CSR for further guidance.
10. You can continue to select the green plus sign to add filters for the Batches that you create.

Creating a Template in Evolution

1. Go to **Company - Payroll Defaults - Payroll Check Templates**
2. Fill out the information in the Details Tab

- Enter the Name of the Template
- If the checks should be taxed at a supplemental (higher) rate select yes (if they are not to be taxed supplemental select no)
- The Federal Override Type has the following: Usually you will select None as the type in this area. If you select one of the other options you will fill out an amount or percent in the Federal Override Value.

None	Daily
Regular Amount	Weekly
Regular Percent	Bi-Weekly
Additional Amount	Semi-Monthly
Additional Percent	Monthly
	Quarterly
	Semi-Annual
	Annual

- You will select the Override Frequency:
- You will select the Prorate Scheduled E/D's (Yes or No)

3. Fill out the information in the Blocks Tab

4. Select Block DD if you want no Direct Deposit to come in.
5. Select Block DD Except Net if you want all DD accounts except the Net to be Blocked.
6. Select All under Block Time Off Accural if you want both Accruals and Used to be Blocked. Select Accrual if all that you want blocked is the Accural.
7. Select Block Auto Distribution if you do not want any Auto Labor Distributions that have been set up to run.

8. Select Block Scheduled E/D's Except DD if you want all Scheduled E/D's except DD to be blocked
9. Block Scheduled E/S From Agency if you do not want any Agency Checks to be created
10. Block Scheduled E/D Except Pension if you want all Scheduled E/D's except for any Pensions to be Blocked.
11. The box to the right allows you to block certain codes.
12. Select the green plus sign in the box to add another line to add codes to be blocked.
13. Fill in the information in the Taxes Tab:

| Browse | Details | Blocks | Taxes | States | Locals |

Block Federal
◉ Yes   ○ No

Block ER FUI
○ Yes   ◉ No

Exclude Additional Federal
[Additional ▼]

Block ER OASDI
○ Yes   ◉ No

Block EE OASDI
○ Yes   ◉ No

Block ER Medicare
○ Yes   ◉ No

Block EE Medicare
○ Yes   ◉ No

Block EE EIC
○ Yes   ◉ No

Notes:

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14. Fill out the States Tab:

| Browse | Details | Blocks | Taxes | States | Locals |

? S...▼	Tax At Supplemental Rate	Block State	Block SDI	Block SUI	State Override Type	State Override Valu

State
[▼]

State Override Type
[▼]

State Override Value
[ ]

Tax at Supplemental Rate
○ Yes   ○ No

Block State
○ Yes   ○ No

Exclude Additional State
[▼]

Block SDI
○ Yes   ○ No

Block SUI
○ Yes   ○ No

➕ ➖

Notes:_____

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