



## Dynamic Budgets User Guide for How to Change a Salary Pay Cycle



# **User Guide** **for** **How to Change a Salary Pay Cycle**



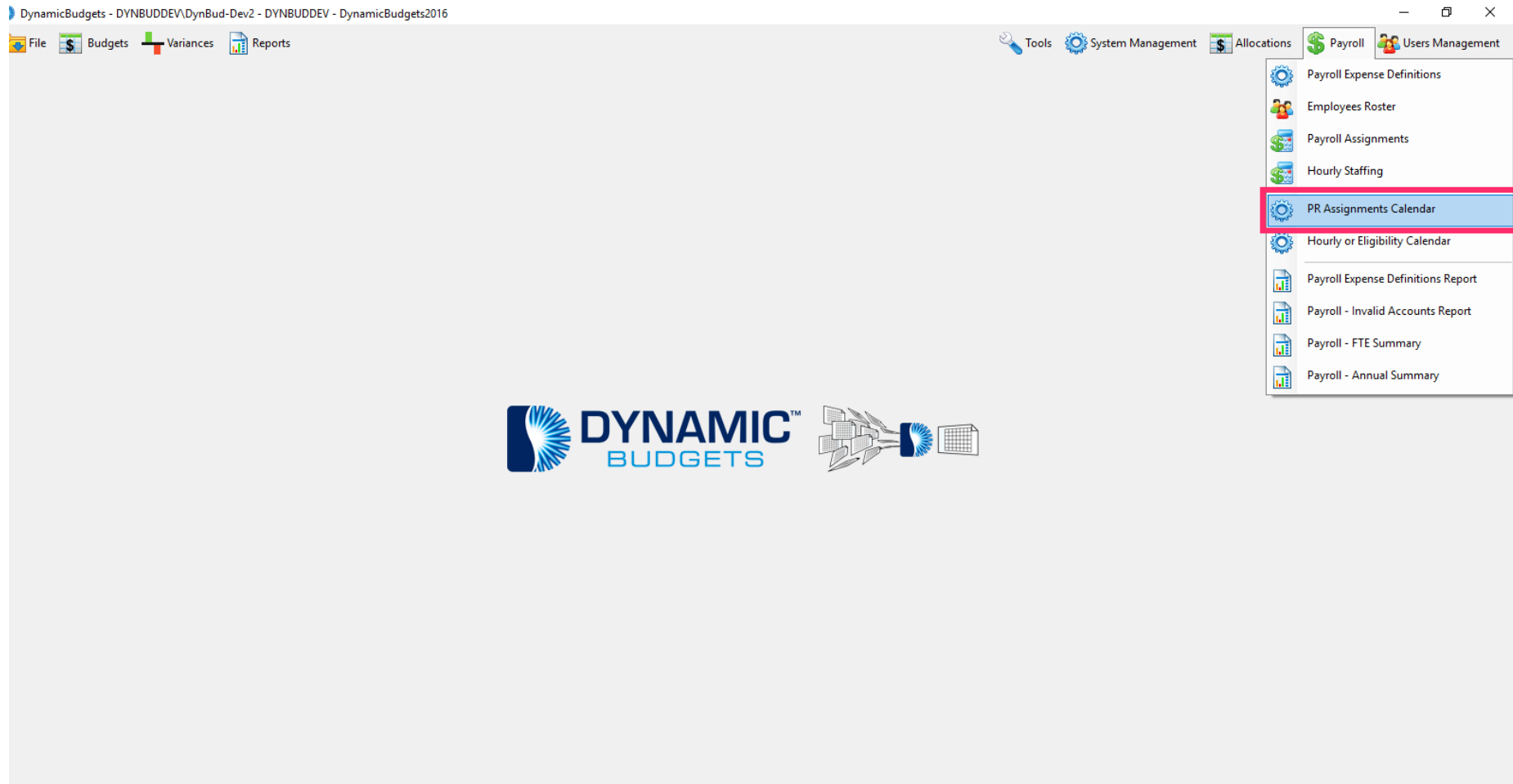
How to Change a Salary Pay Cycle. Purpose: This guide will show you how to change the pay cycle for salaried staff from once a month to 26 pay periods, or # of working days per fiscal month.



## How to Change a Salary Pay Cycle

Purpose: This guide will show you how to change the pay cycle for salaried staff from once a month to 26 pay periods, or # of working days per fiscal month.

Click on the **Payroll menu dropdown** and choose the **PR Assignments Calendar**.





Click on the BudgetID dropdown list. For this example, click **2017 Monthly**. Note: We will highlight how to change the setup for two scenarios.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Payroll Expense Definitions PR Assignments Calendar

**PR Assignments Calendar**

CompanyDB\* The WorldOnline BudgetID None

Save Delete Duplicate Pay Case

Specifying the number of Pay Periods per Fiscal Period is Critical. If you budget payroll expense evenly across all fiscal periods you do not need to use this screen. This Pay Period configuration screen can be used to specify the number of pay periods per fiscal period, please specify the relative number of pay periods per fiscal period for those concerned about budgeting on an accrual basis. Should you need to custom define variable number of pay periods or working days per each fiscal period, please designate which period # (January) for tax liability calculations.




None  
None  
LongTerm Care  
ELIM  
ISC  
Natalie  
2014 FCAST  
kurt v2  
v2 0217  
**2017 Monthly**  
2019 v43  
Terry  
2017 Annual Budget

Fiscal Period#	Period Label	Number of PayPeriods	Designate 1st period # (Year Start (January)).
P01	Jan	1	January P01
P02	Feb	1	
P03	Mar	1	
P04	Apr	1	
P05	May	1	
P06	Jun	1	
P07	Jul	1	
P08	Aug	1	
P09	Sep	1	
P10	Oct	1	
P11	Nov	1	
P12	Dec	1	
Total		12	



**Scenario One:** To change the pay periods to 26 periods, change the number of PayPeriods per Fiscal Period from 1 per Fiscal Period to a total of 26.

CompanyDB\* The WorldOnline BudgetID 2017 Monthly

 Save |  Delete |  Duplicate Pay Calendar

Specifying the number of Pay Periods per Fiscal Period is Optional. By default the application will assume that Annual Salary will be evenly split by the number of fiscal periods defined in the company configuration. If you budget payroll expense evenly across all fiscal periods you do not need to use this screen. This Pay Period configuration screen can be used to specify the number of pay periods in a fiscal period for those who budget on a cash basis, or can accommodate the number of business days per fiscal period for those concerned about budgeting on an accrual basis. Should you need to custom define variable number of pay periods or working days per each fiscal period, please specify the relative number of "pay periods" below.  
If using a fiscal calendar, please designate which period # represents the start of the year (January) for tax liability calculations.

Fiscal Period#	Period Label	Number of PayPeriods
P01	Jan	2
P02	Feb	2
P03	Mar	2
P04	Apr	3
P05	May	2
P06	Jun	2
P07	Jul	2
P08	Aug	2
P09	Sep	2
P10	Oct	3
P11	Nov	2
P12	Dec	2
Total		26




Please designate 1st period #  
Calendar Year Start (January).

January P01



Click on **Save**.

CompanyDB\* The WorldOnline BudgetID 2017 Monthly

 Save
  Delete
 | 
  Duplicate Pay Calendar

Specifying the number of Pay Periods per Fiscal Period is Optional. By default the application will assume that Annual Salary will be evenly split by the number of fiscal periods defined in the company configuration. If you budget payroll expense evenly across all fiscal periods you do not need to use this screen. This Pay Period configuration screen can be used to specify the number of pay periods in a fiscal period for those who budget on a cash basis, or can accommodate the number of business days per fiscal period for those concerned about budgeting on an accrual basis. Should you need to custom define variable number of pay periods or working days per each fiscal period, please specify the relative number of "pay periods" below.  
 If using a fiscal calendar, please designate which period # represents the start of the year (January) for tax liability calculations.

Fiscal Period #	Period Label	Number of PayPeriods
P01	Jan	2
P02	Feb	2
P03	Mar	2
P04	Apr	3
P05	May	2
P06	Jun	2
P07	Jul	2
P08	Aug	2
P09	Sep	2
P10	Oct	3
P11	Nov	2
P12	Dec	2
Total		26

Please designate 1st period #  
Calendar Year Start (January).  
January P01



**Scenario Two:** To change the # of Calendar or Working days, change the number of PayPeriods per Fiscal Period from 1 per Fiscal Period to the relevant number of calendar or working days in each fiscal period.

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Payroll Expense Definitions PR Assignments Calendar

**PR Assignments Calendar**

CompanyDB\* The WorldOnline BudgetID 2017 Monthly

Save Delete Duplicate Pay Calendar

Specifying the number of Pay Periods per Fiscal Period is Optional. By default the application will assume that Annual Salary will be evenly split by the number of fiscal periods defined in the company configuration. If you budget payroll expense evenly across all fiscal periods you do not need to use this screen. This Pay Period configuration screen can be used to specify the number of pay periods in a fiscal period for those who budget on a cash basis, or can accommodate the number of business days per fiscal period for those concerned about budgeting on an accrual basis. Should you need to custom define variable number of pay periods or working days per each fiscal period, please specify the relative number of "pay periods" below. If using a fiscal calendar, please designate which period # represents the start of the year (January) for tax liability calculations.

Fiscal Period #	Period Label	Number of PayPeriods
P01	Jan	31
P02	Feb	28
P03	Mar	31
P04	Apr	30
P05	May	31
P06	Jun	30
P07	Jul	31
P08	Aug	31
P09	Sep	30
P10	Oct	31
P11	Nov	30
P12	Dec	31
Total		365

Please designate 1st period #  
Calendar Year Start (January).

January P01



Click on **Save**. Note: This has only updated the calendar but has not recalculated any of the payroll transactions.

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Payroll Expense Definitions PR Assignments Calendar

**PR Assignments Calendar**

CompanyDB\* The WorldOnline BudgetID 2017 Monthly

**Save** | **Delete** | Duplicate Pay Calendar

Specifying the number of Pay Periods per Fiscal Period is Optional. By default the application will assume that Annual Salary will be evenly split by the number of fiscal periods defined in the company configuration. If you budget payroll expense evenly across all fiscal periods you do not need to use this screen. This Pay Period configuration screen can be used to specify the number of pay periods in a fiscal period for those who budget on a cash basis, or can accommodate the number of business days per fiscal period for those concerned about budgeting on an accrual basis. Should you need to custom define variable number of pay periods or working days per each fiscal period, please specify the relative number of "pay periods" below.  
If using a fiscal calendar, please designate which period # represents the start of the year (January) for tax liability calculations.

Fiscal Period#	Period Label	Number of PayPeriods
P01	Jan	31
P02	Feb	28
P03	Mar	31
P04	Apr	30
P05	May	31
P06	Jun	30
P07	Jul	31
P08	Aug	31
P09	Sep	30
P10	Oct	31
P11	Nov	30
P12	Dec	31
Total		365

Please designate 1st period #  
Calendar Year Start (January).

January P01





The next steps will apply the calendar changes and recalculate payroll. Now Click **Payroll** dropdown menu and choose **Payroll Expense Definitions**.

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**Payroll Assignments**

CompanyDB: The WorldOnline BudgetID: 2017 Monthly EmployeeID: EmployeeName: Search

OrgUnit: 100 - La Palma

Save Delete Add All Employees Append 50 rows Recalc Projections

For given CompanyDB - BudgetID, you may define payroll expense for an employee only once, OrgUnit Rollup, OrgUnit, ActNum are mandatory  
If a red warning message shows in the row header, you have skipped mandatory fields

EmployeeID	Employee Name	Notes	Files	HRCompany	Department	JobTitle	OrgUnit	ActNum	AnnualSalary	Base Rate ppd	Rate 1 %Change	New Rate 1	New Rate 1 Effective Period	New Annualized Salary 1

Payroll Expense Definitions  
Employees Roster  
Payroll Assignments  
Hourly Staffing  
PR Assignments Calendar  
Hourly or Eligibility Calendar  
Payroll Expense Definitions Report  
Payroll - Invalid Accounts Report  
Payroll - FTE Summary  
Payroll - Annual Summary



Click on the CompanyDB dropdown list. In this example, select **The WorldOnline**.

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### Payroll Expense Definitions

CompanyDB: **The WorldOnline** BudgetID: 2017 Monthly Search Recalculate Payroll Trx

Save Changes Delete Selected Duplicate Definitions Add Options Rows

SortOrder	FieldName	FieldLabel	CalcType	Object	Account (optional)	HasOptions	Active	Taxable	Mandatory	Hourly Prorated	Eligible Date Field	Input Field	Notes	Attachments
*	OptionName	OptionValue	FiscalPeriod	WageLimit	Max									



Click on the BudgetID dropdown list. In this example, select **2017 Monthly**.

DynamicBudgets - DYNBUDDEV\DynBud-Dev2 - DYNBUDDEV - DynamicBudgets2016

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

**Payroll Expense Definitions**

CompanyDB: The WorldOnline BudgetID: 2017 Monthly Search Recalculate Payroll Trx

Save Changes Delete Selected Duplicate Add Options Rows

Expense Definitions Hourly Staffing Field Mapping

SortOrder	FieldName	FieldLabel	Account (optional)	HasOptions	Active	Taxable	Mandatory	Hourly Prorated	Eligible Date Field	Input Field	Notes	Attachments

Options:

OptionName	OptionValue	FiscalPeriod	WageLimit	Max
*				

BudgetID dropdown list options:

- LongTerm Care
- ELIM
- TSC
- Kurt
- Natalie
- 2014 FCAST
- kurt v2
- v2 0217
- 2017 Monthly**
- 2019 v43
- Terry
- 2017 Annual Budget



Click on **Search**.

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Payroll Assignments Payroll Expense Definitions

**Payroll Expense Definitions**

CompanyDB: The WorldOnline BudgetID: 2017 Monthly **Search** Recalculate Payroll Trx

Save Changes Delete Selected Duplicate Definitions Add Options Rows

Expense Definitions Hourly Staffing Field Mapping

SortOrder	FieldName	FieldLabel	CalcType	Object	Account (optional)	HasOptions	Active	Taxable	Mandatory	Hourly Prorated	Eligible Date Field	Input Field	Notes	Attachments
*														

OptionName	OptionValue	FiscalPeriod	WageLimit	Max



Click on the **Recalculate Payroll Trx** button.

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Payroll Assignments Payroll Expense Definitions

**Payroll Expense Definitions**

CompanyDB: The WorldOnline BudgetID: 2017 Monthly Search **Recalculate Payroll Trx**

Save Changes Delete Selected Duplicate Definitions Add Options Rows

Expense Definitions Hourly Staffing Field Mapping

	SortOrder	FieldName	FieldLabel	CalcType	Object	Account (optional)	HasOptions	Active	Taxable	Mandatory	Hourly Prorated	Eligible Date Field	Input Field	Notes	Attachments
▶	0	Field1					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field2					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field3					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field4					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field5					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field6					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field7					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field8					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field9					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field10					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field11					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field12					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field13					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field14					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field15					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field16					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field17					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field18					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field19					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
	0	Field20					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			

	OptionName	Option Value	FiscalPeriod	WageLimit	Max1
▶		0			
*					



A message will appear that reads, **Do you wish to recalculate all payroll transactions for all employees in this budget? This operation could take a long time, please be patient.** Click **Yes**.

Payroll Assignments | Payroll Expense Definitions

**Payroll Expense Definitions**

CompanyDB: The WorldOnline | BudgetID: 2017 Monthly | Search | Recalculate Payroll Trx

Save Changes | Delete Selected | Duplicate Definitions | Add Options Rows

Expense Definitions | Hourly Staffing Field Mapping

SortOrder	FieldName	FieldLabel	CalcType	Object	Account (optional)	HasOptions	Active	Taxable	Mandatory	Hourly Prorated	Eligible Date Field	Input Field	Notes	Attachments
0	Field1										None			
0	Field2										None			
0	Field3										None			
0	Field4										None			
0	Field5										None			
0	Field6										None			
0	Field7										None			
0	Field8										None			
0	Field9										None			
0	Field10										None			
0	Field11										None			
0	Field12										None			
0	Field13										None			
0	Field14										None			
0	Field15										None			
0	Field16										None			
0	Field17										None			
0	Field18										None			
0	Field19										None			
0	Field20										None			

Confirm

Do you wish to recalculate all payroll transactions for all employees in this budget?

This operation could take a long time, please be patient

Yes No

OptionName	Option Value	FiscalPeriod	WageLimit	Max1
*	0			

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A message will appear that reads, **recalculate payroll projections completed successfully unless errors, were listed in the log screen.** If there, were errors, contact Dynamic Budgets support for assistance. Click **OK**.

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File Budgets Variances Reports

Payroll Assignments Payroll Expense Definitions

CompanyDB The WorldOnline BudgetID 2017 Monthly Search Recalculate Payroll Trx

Save Changes Delete Selected Duplicate Definitions Add Options Rows

Expense Definitions Hourly Staffing Field Mapping

SortOrder	FieldName	FieldLabel	CalcType	Object	Account (optional)	HasO
0	Field1					
0	Field2					
0	Field3					
0	Field4					
0	Field5					
0	Field6					
0	Field7					
0	Field8					
0	Field9					
0	Field10					
0	Field11					
0	Field12					
0	Field13					
0	Field14					
0	Field15					
0	Field16					
0	Field17					
0	Field18					
0	Field19					
0	Field20					

Message

Recalculate payroll projections completed successfully, please check log for more details

Log

SavePayrollExpense - completed with no errors

SaveHourlyStaffing - completed with no errors

OK

OptionName	Option Value	FiscalPeriod	WageLimit	MaxT
	0			
*				



Note: The conversion of the Payroll Calendar Pay Periods are complete and you should have recalculated all payroll transactions for both Hourly and Salary staff.

Payroll Assignments | Payroll Expense Definitions

CompanyDB: The WorldOnline | BudgetID: 2017 Monthly | Search | Recalculate Payroll Trx

Save Changes | Delete Selected | Duplicate Definitions | Add Options Rows

Expense Definitions | Hourly Staffing Field Mapping

SortOrder	FieldName	FieldLabel	CalcType	Object	Account (optional)	HasOptions	Active	Taxable	Mandatory	Hourly Prorated	Eligible Date Field	Input Field	Notes	Attachments
0	Field 1					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field2					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field3					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field4					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field5					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field6					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field7					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field8					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field9					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field10					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field11					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field12					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field13					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field14					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field15					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field16					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field17					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field18					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field19					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			
0	Field20					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None			

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OptionName	Option Value	FiscalPeriod	WageLimit	Max1
	0			
*				

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That's It. You're Done.



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**That's It. You're Done.**