Dynamic Budgets User Guide for Payroll Employees Roster

Click on Payroll.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynamicbudgets

File | Budgets | Variances | Reports

Tools | System Management | Allocations | **Payroll** | Users Management

UG-Payroll Employees Roster
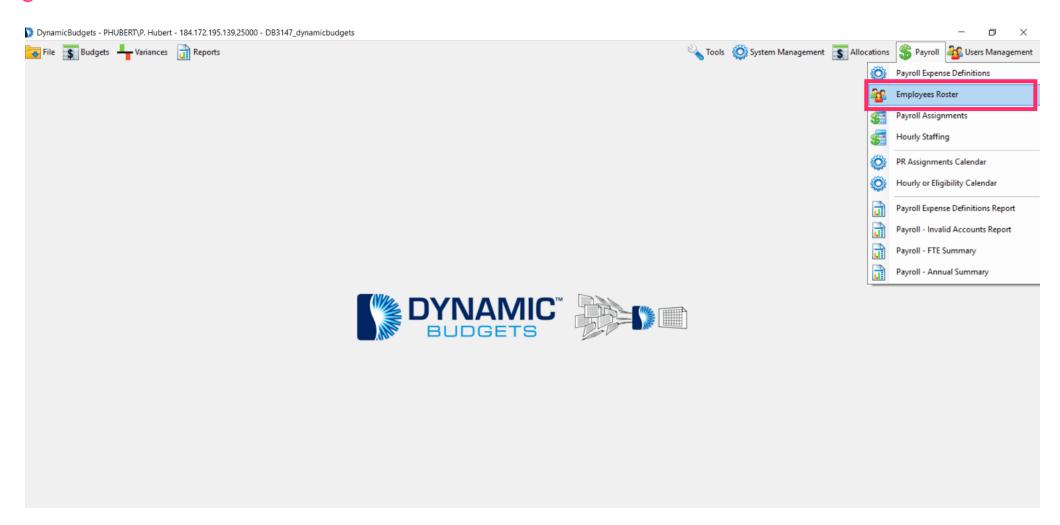
zgidwani

Click on **Employees Roster.**

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File | Budgets | Variances | Reports | Tools | System Management | Allocations | Payroll | Users Management

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

DYNAMIC™ BUDGETS
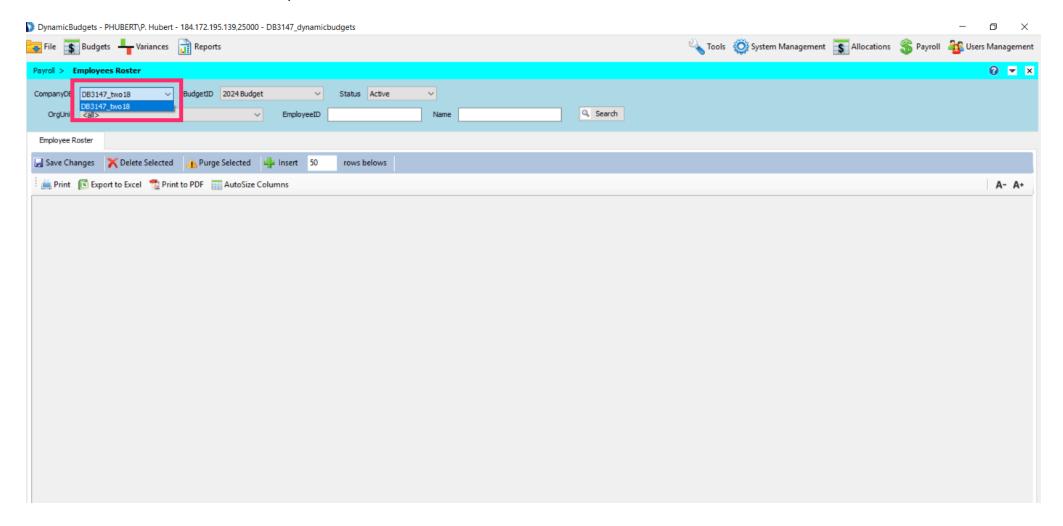
Click on the CompanyDB dropdown list. Make a selection. Each company has its own roster. In this example, we will select DB3147_two18.
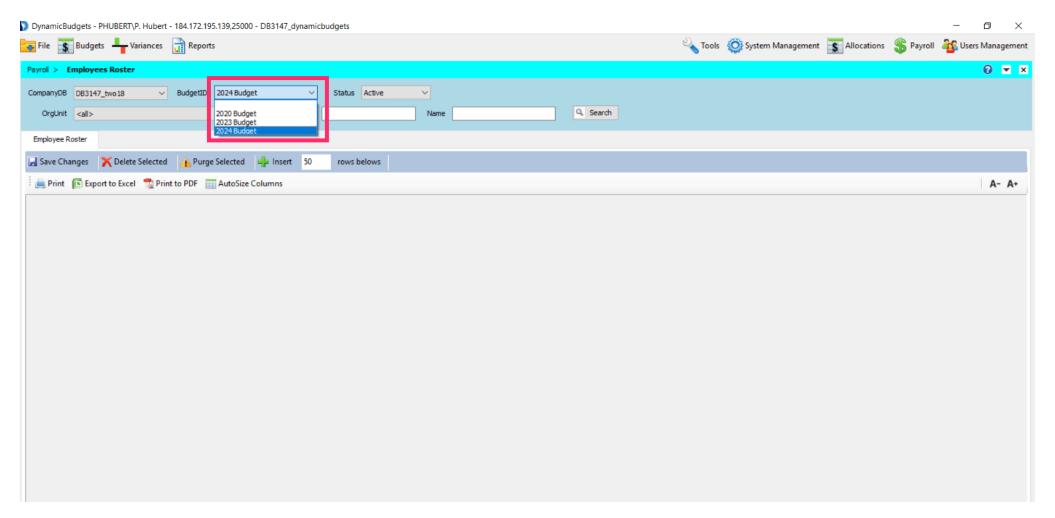
Click on the BudgetID dropdown list. Make a selection. In this example, we will select 2024 Budget.

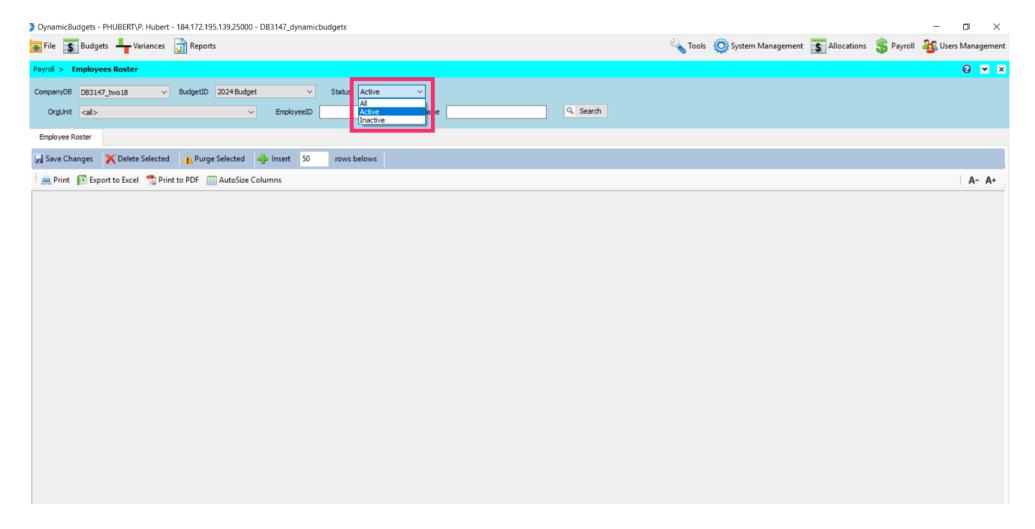Click on the Status dropdown list. Make a selection. In this example, we will keep
the default Active.
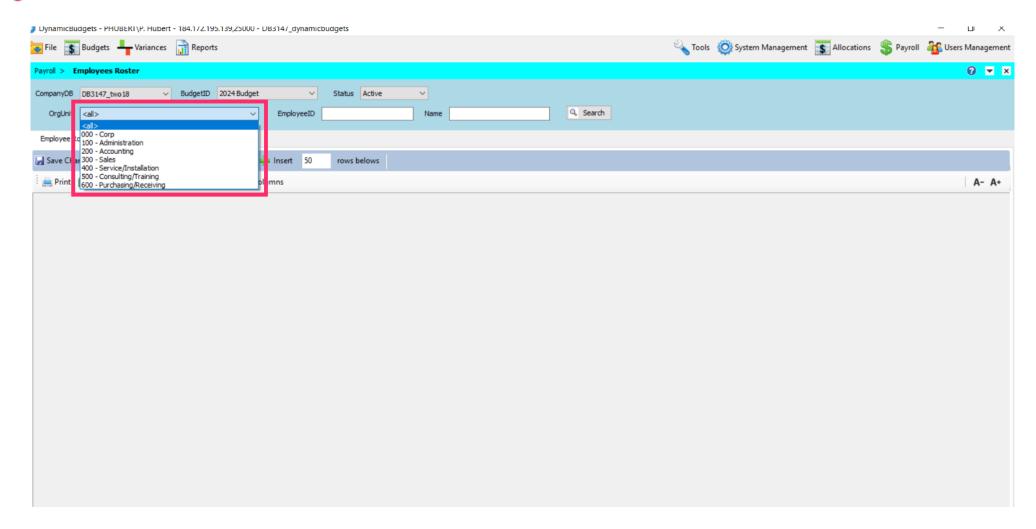
Click on the OrgUnit dropdown list. Make a selection. In this example, we will select all.

Click on Search.
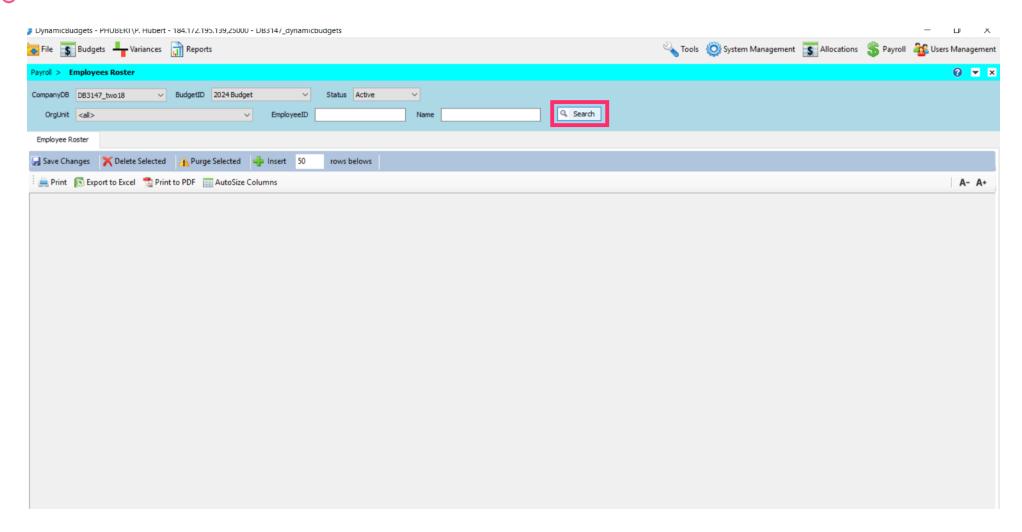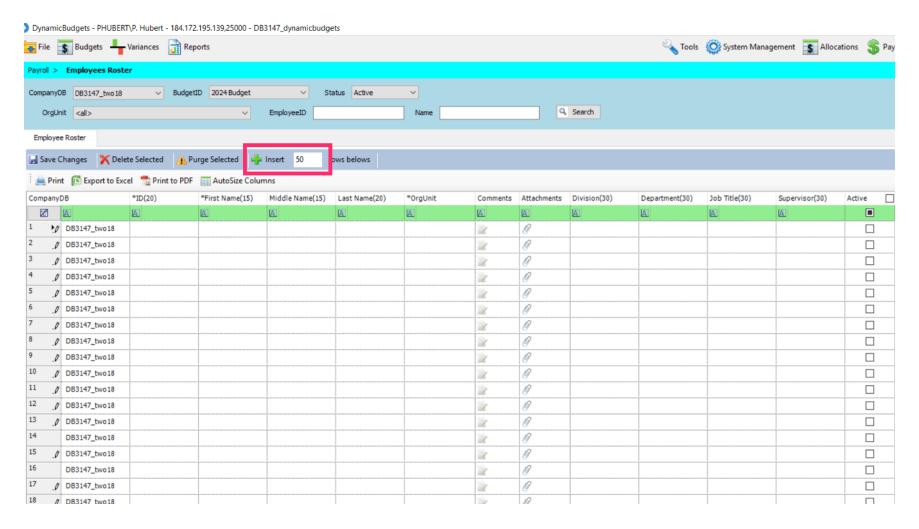
Note: The screen starts with 50 blank rows.   For higher employee counts you will need to add more rows. Enter that number in the white box and click on insert.
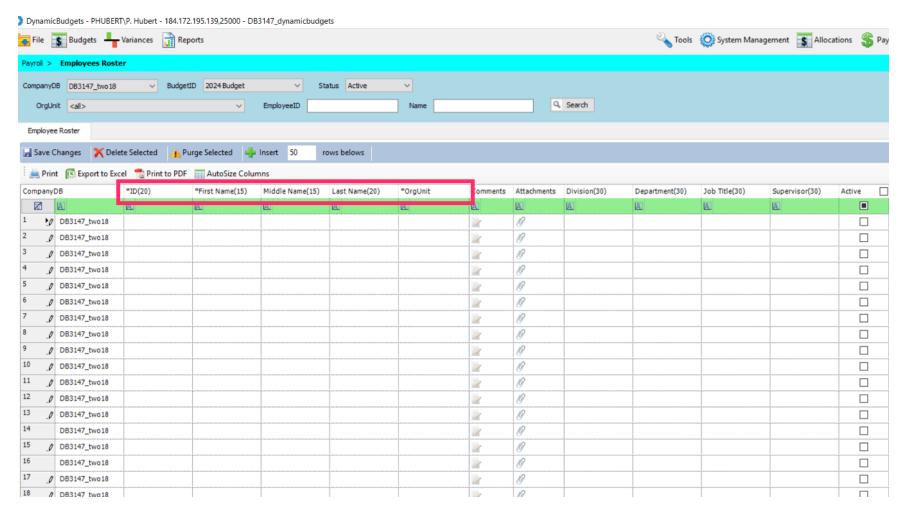
Note: Only 4 fields are required(*) EmployeeID, First Name, Last Name, and OrgUnit. Middle Name and all other fields are optional. The maximum number of characters is noted to the right of each column name().

All other data fields on the screen are Optional. You can enter any type of any information into any field. The Department and JobTitle fields can be used as temp fields to transfer information to the payroll entry screens (GLAcct, or Salary Amount)

Division(30)	Department(30)	Job Title(30)	Supervisor(30)	Active	☑ SalaryHourly
				☑	
				☑	
				☑	
				☑	
				☑	
				☑	
				☑	
				☑	
				☑	
				☑	
				☑	
				☑	
				☑	

You can enter detailed comments about an employee or upload file attachments if necessary. But You must first save the employee records before you can use comments or attachments.

You can copy and paste your employee data from excel into Dynamic Budgets. Please export your data from your payroll system, arrange the columns as you see them in Dynamic Budgets, then copy & paste.

| | | | | | | | | | META 1 | META 2 | META 3 | META 4 |
| | | | Middle | | | | Salary or | | | Anniversary | | Christmas |
Company DB	Employee ID	First Name	Name	Last Name	OrgUnit	Job Title	Supervisor	Hourly	Pay Grade	Month	Birth Month	Bonus
DB3147_two18	150	Daphne		Akery	300	Customer Service Rep	Debbie Venus	Hourly	2	9	10	250
DB3147_two18	104	Tyler		Ames	200	A/R Clerk	Tiki Thomason	Hourly	2	1	9	250
DB3147_two18	120	Bernice		Brown	400	Delivery Driver	Debbie Venus	Hourly	2	12	11	250
DB3147_two18	115	Melinda		Cooper	300	Customer Service Rep	Debbie Venus	Hourly	2	3	4	250
DB3147_two18	100	Jess		Good	000	CEO		Salary	8	6	1	1500
DB3147_two18	130	Terrie		Jackson	300	Customer Service Rep	Debbie Venus	Hourly	2	10	9	250
DB3147_two18	105	Nay		James	200	A/P Clerk	Tiki Thomason	Hourly	2	4	3	250
DB3147_two18	125	Matthew		Jones	300	Customer Service Rep	Debbie Venus	Hourly	2	7	7	250
DB3147_two18	101	Brenda		Joyce	100	Vice President	Jess Good	Salary	6	6	10	1000
DB3147_two18	106	William		King	100	Marketing Manager	Brenda Joyce	Salary	4	11	5	500
DB3147_two18	103	Tiki		Thomason	200	Accounting Manager	Frank Willis	Salary	5	8	3	500
DB3147_two18	110	Debbie		Venus	300	Customer Service Supervisor	William King	Salary	4	2	9	500
DB3147_two18	102	Frank		Willis	000	CFO	Jess Good	Salary	7	5	1	1000

You can copy single columns or multiple columns at a time.

Company DB	Employee ID	First Name	Middle Name	Last Name	OrgUnit	Job Title	Supervisor	Salary or Hourly	META 1 Pay Grade	META 2 Anniversary Month	META 3 Birth Month	META 4 Christmas Bonus
DB3147_two18	150	Daphne		Akery	300	Customer Service Rep	Debbie Venus	Hourly	2	9	10	250
DB3147_two18	104	Tyler		Ames	200	A/R Clerk	Tiki Thomason	Hourly	2	1	9	250
DB3147_two18	120	Bernice		Brown	400	Delivery Driver	Debbie Venus	Hourly	2	12	11	250
DB3147_two18	115	Melinda		Cooper	300	Customer Service Rep	Debbie Venus	Hourly	2	3	4	250
DB3147_two18	100	Jess		Good	000	CEO		Salary	8	6	1	1500
DB3147_two18	130	Terrie		Jackson	300	Customer Service Rep	Debbie Venus	Hourly	2	10	9	250
DB3147_two18	105	Nay		James	200	A/P Clerk	Tiki Thomason	Hourly	2	4	3	250
DB3147_two18	125	Matthew		Jones	300	Customer Service Rep	Debbie Venus	Hourly	2	7	7	250
DB3147_two18	101	Brenda		Joyce	100	Vice President	Jess Good	Salary	6	6	10	1000
DB3147_two18	106	William		King	100	Marketing Manager	Brenda Joyce	Salary	4	11	5	500
DB3147_two18	103	Tiki		Thomason	200	Accounting Manager	Frank Willis	Salary	5	8	3	500
DB3147_two18	110	Debbie		Venus	300	Customer Service Supervisor	William King	Salary	4	2	9	500
DB3147_two18	102	Frank		Willis	000	CFO	Jess Good	Salary	7	5	1	1000

Paste your data from the excel report into Dynamic Budgets in sections using right-click and paste from the mouse or Control-V on your keyboard. Do not attempt to paste over the Comments and Attachments columns, this will generate an error.
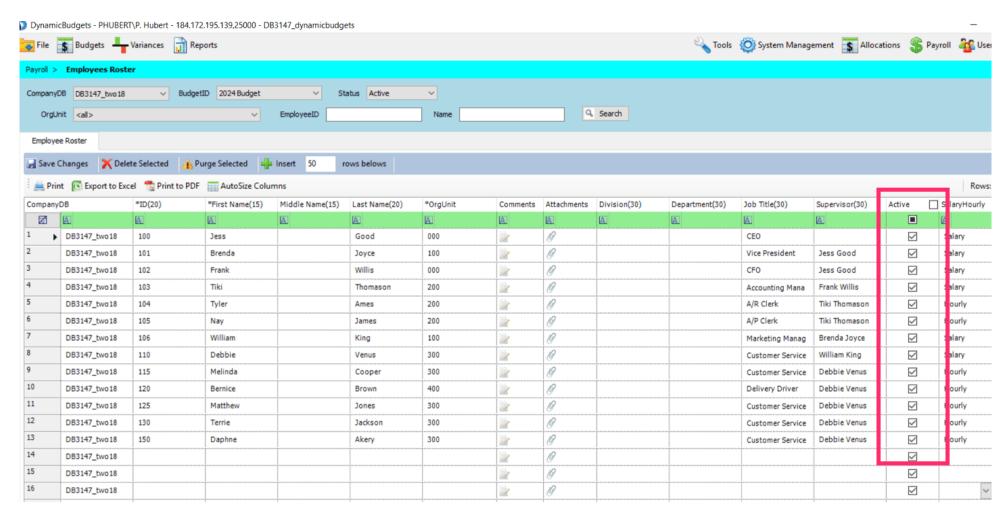
DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynamicbudgets

File | Budgets | Variances | Reports | Tools | System Management | Allocations | Payroll | User

Payroll > **Employees Roster**

| CompanyDB | DB3147_two18 | BudgetID | 2024 Budget | Status | Active |
| OrgUnit | <all> | EmployeeID | | Name | | Search |

Employee Roster

Save Changes | Delete Selected | Purge Selected | Insert | 50 | rows belows

Print | Export to Excel | Print to PDF | AutoSize Columns | Rows:

	CompanyDB	*ID(20)	*First Name(15)	Middle Name(15)	Last Name(20)	*OrgUnit	Comments	Attachments	Division(30)	Department(30)	Job Title(30)	Supervisor(30)	Active	SalaryHourly
1	DB3147_two18	100	Jess		Good	000					CEO		☑	Salary
2	DB3147_two18	101	Brenda		Joyce	100					Vice President	Jess Good	☑	Salary
3	DB3147_two18	102	Frank		Willis	000					CFO	Jess Good	☑	Salary
4	DB3147_two18	103	Tiki		Thomason	200					Accounting Mana	Frank Willis	☑	Salary
5	DB3147_two18	104	Tyler		Ames	200					A/R Clerk	Tiki Thomason	☑	Hourly
6	DB3147_two18	105	Nay		James	200					A/P Clerk	Tiki Thomason	☑	Hourly
7	DB3147_two18	106	William		King	100					Marketing Manag	Brenda Joyce	☑	Salary
8	DB3147_two18	110	Debbie		Venus	300					Customer Service	William King	☑	Salary
9	DB3147_two18	115	Melinda		Cooper	300					Customer Service	Debbie Venus	☑	Hourly
10	DB3147_two18	120	Bernice		Brown	400					Delivery Driver	Debbie Venus	☑	Hourly
11	DB3147_two18	125	Matthew		Jones	300					Customer Service	Debbie Venus	☑	Hourly
12	DB3147_two18	130	Terrie		Jackson	300					Customer Service	Debbie Venus	☑	Hourly
13	DB3147_two18	150	Daphne		Akery	300					Customer Service	Debbie Venus	☑	Hourly
14	DB3147_two18												☑	
15	DB3147_two18												☑	
16	DB3147_two18												☑	

By default all employees are assumed ACTIVE.   You can uncheck a box to mark the employee as inactive.   Only active employees can be added to the Payroll Entry Screens.
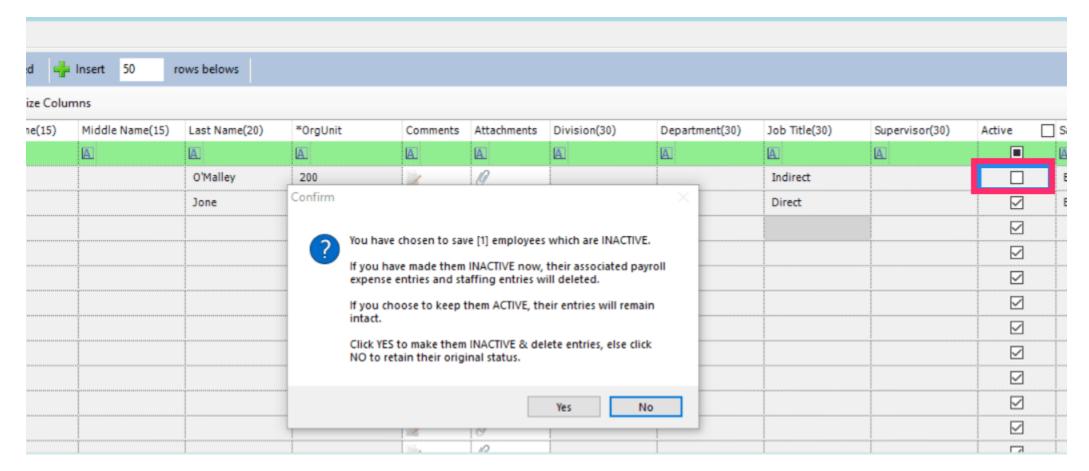
If you inactivate an employee and click SAVE, the application will warn you that it will delete the associated expense transactions and payroll screen entries for the inactive employee(s).
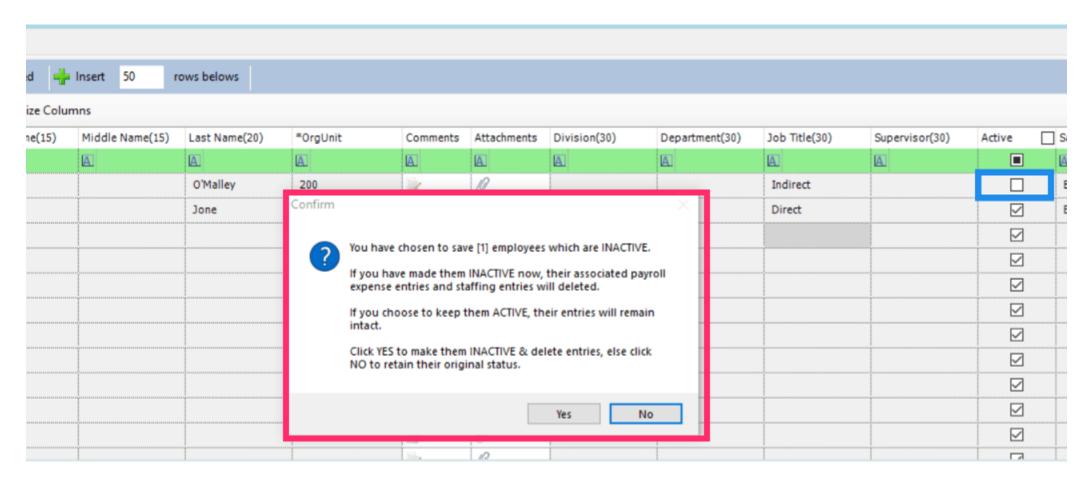
ne(15)	Middle Name(15)	Last Name(20)	*OrgUnit	Comments	Attachments	Division(30)	Department(30)	Job Title(30)	Supervisor(30)	Active	☐ S
		O'Malley	200					Indirect		☐	
		Jone						Direct		☑	
										☑	
										☑	
										☑	
										☑	
										☑	
										☑	
										☑	
										☑	

Confirm ✕

? You have chosen to save [1] employees which are INACTIVE.

If you have made them INACTIVE now, their associated payroll expense entries and staffing entries will deleted.

If you choose to keep them ACTIVE, their entries will remain intact.

Click YES to make them INACTIVE & delete entries, else click NO to retain their original status.

[Yes] [No]

Insert 50 rows belows

ize Columns

Note: There is no Undo, choose wisely.

	Middle Name(15)	Last Name(20)	*OrgUnit	Comments	Attachments	Division(30)	Department(30)	Job Title(30)	Supervisor(30)	Active	
ne(15)	[A]	[A]	[A]	[A]	[A]	[A]	[A]	[A]	[A]	■	
		O'Malley	200					Indirect		☐	
		Jone						Direct		☑	
										☑	
										☑	
										☑	
										☑	
										☑	
										☑	
										☑	
										☑	

Confirm

? You have chosen to save [1] employees which are INACTIVE.

If you have made them INACTIVE now, their associated payroll expense entries and staffing entries will deleted.

If you choose to keep them ACTIVE, their entries will remain intact.

Click YES to make them INACTIVE & delete entries, else click NO to retain their original status.

[Yes] [No]

👁 Do not use the "Add Employees to Hourly Staffing" tab unless its necessary. This tab is for project organizations to load every employee into every department in the company. It can create thousands of unnecessary records and slow down your system.
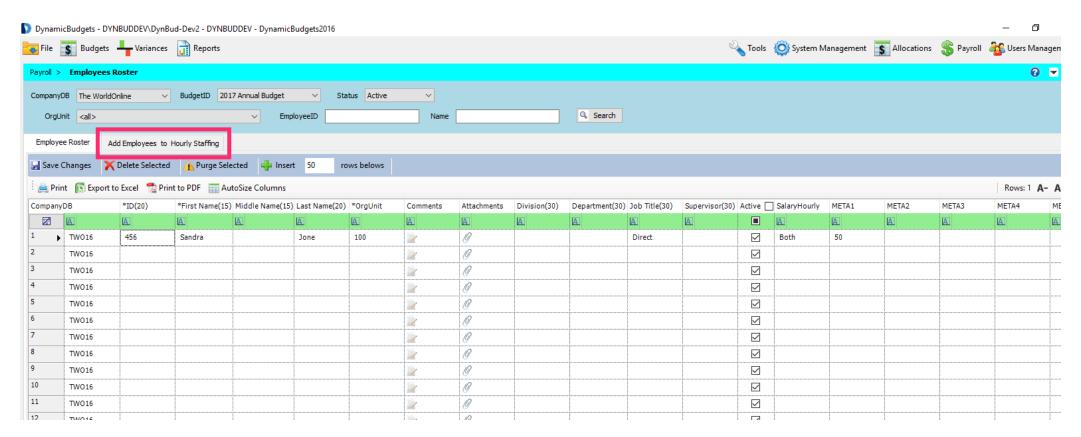
The "Add Employees to Hourly Staffing" tab is a hidden feature. Please contact Dynamic Budgets support for assistance if you feel your organization needs this functionality.
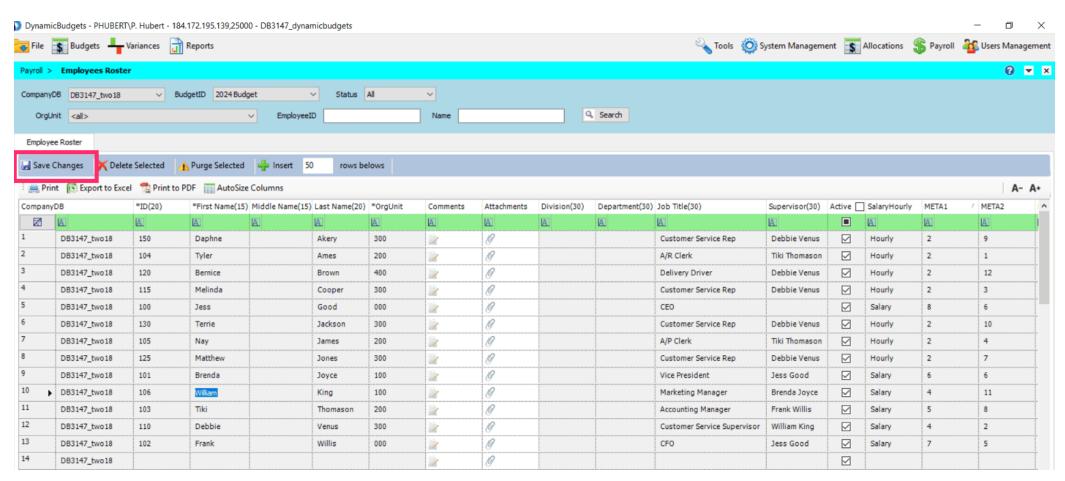
![iorad logo]

UG-Payroll Employees Roster

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👁 Click on Save Changes. A message will appear that reads, "Saved changes to employees successfully."
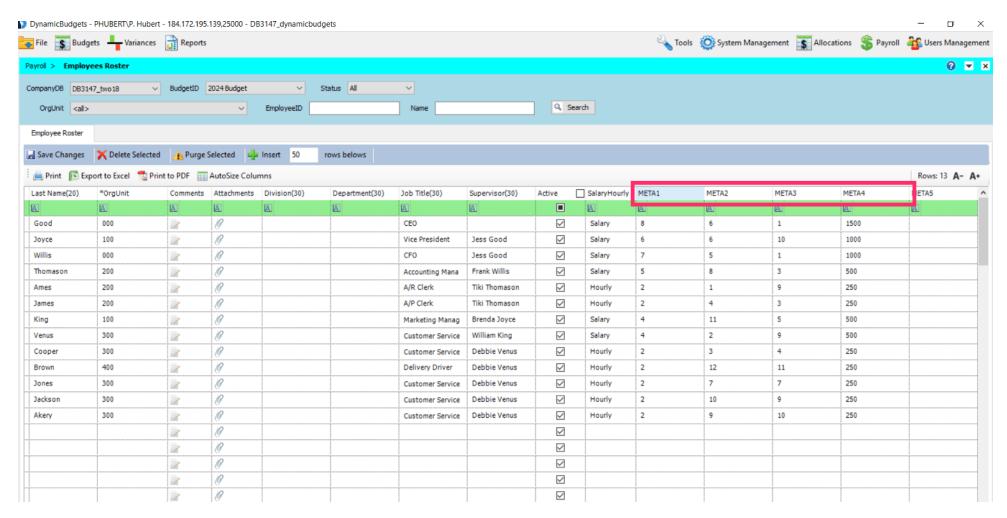
Fields Meta 1-5 are user defined fields. The column titles can be customized to make information easier to manage.
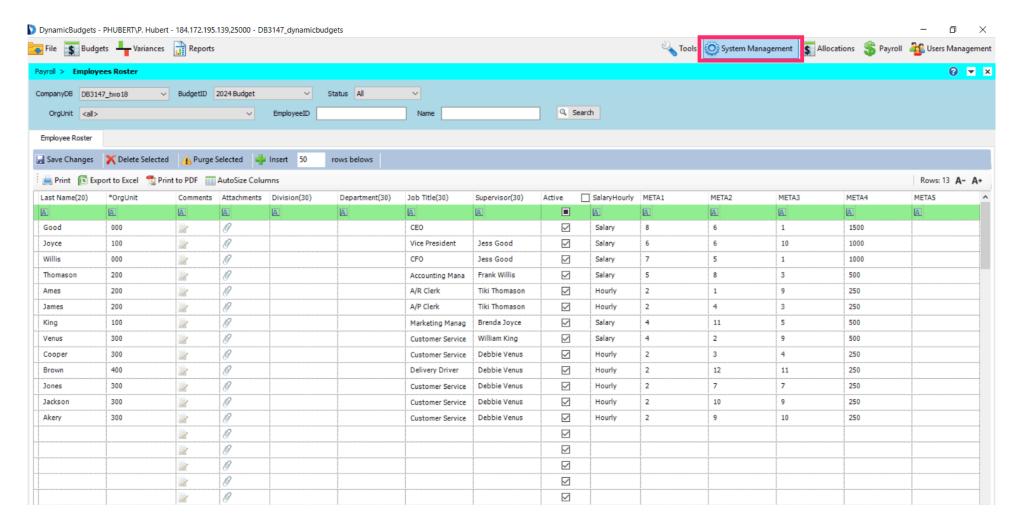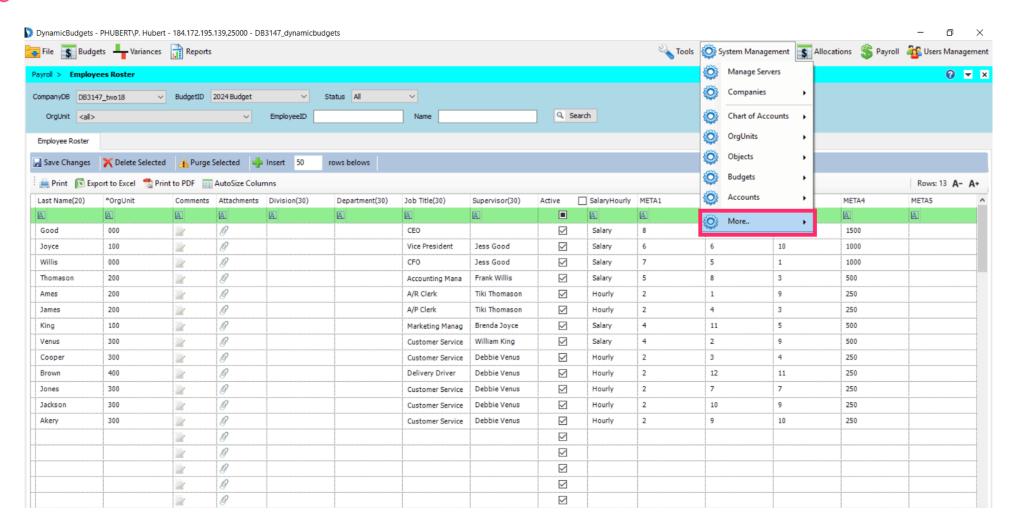
Click on System Management.

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File | Budgets | Variances | Reports | Tools | System Management | Allocations | Payroll | Users Management

Payroll > **Employees Roster**

| CompanyDB | DB3147_two18 | BudgetID | 2024 Budget | Status | All |
| OrgUnit | <all> | EmployeeID | | Name | | Search |

Employee Roster

Save Changes | Delete Selected | Purge Selected | Insert | 50 | rows belows

Print | Export to Excel | Print to PDF | AutoSize Columns | Rows: 13 A- A+

Last Name(20)	*OrgUnit	Comments	Attachments	Division(30)	Department(30)	Job Title(30)	Supervisor(30)	Active	SalaryHourly	META1	META2	META3	META4	META5
Good	000					CEO		☑	Salary	8	6	1	1500	
Joyce	100					Vice President	Jess Good	☑	Salary	6	6	10	1000	
Willis	000					CFO	Jess Good	☑	Salary	7	5	1	1000	
Thomason	200					Accounting Mana	Frank Willis	☑	Salary	5	8	3	500	
Ames	200					A/R Clerk	Tiki Thomason	☑	Hourly	2	1	9	250	
James	200					A/P Clerk	Tiki Thomason	☑	Hourly	2	4	3	250	
King	100					Marketing Manag	Brenda Joyce	☑	Salary	4	11	5	500	
Venus	300					Customer Service	William King	☑	Salary	4	2	9	500	
Cooper	300					Customer Service	Debbie Venus	☑	Hourly	2	3	4	250	
Brown	400					Delivery Driver	Debbie Venus	☑	Hourly	2	12	11	250	
Jones	300					Customer Service	Debbie Venus	☑	Hourly	2	7	7	250	
Jackson	300					Customer Service	Debbie Venus	☑	Hourly	2	10	9	250	
Akery	300					Customer Service	Debbie Venus	☑	Hourly	2	9	10	250	

UG-Payroll Employees Roster

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Click on More.

Click on App Config/Menu Editor.
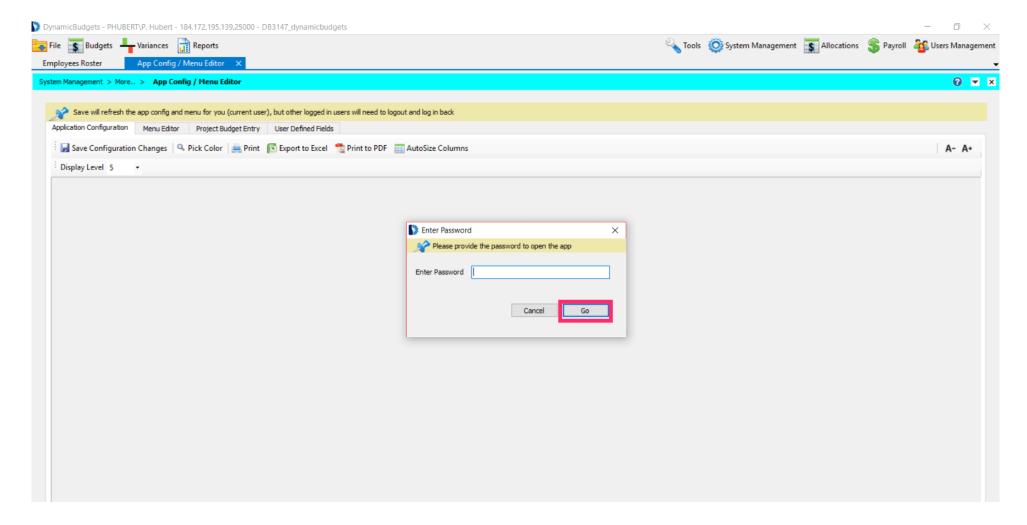
Enter the System Manager password in the white box then click on Go.
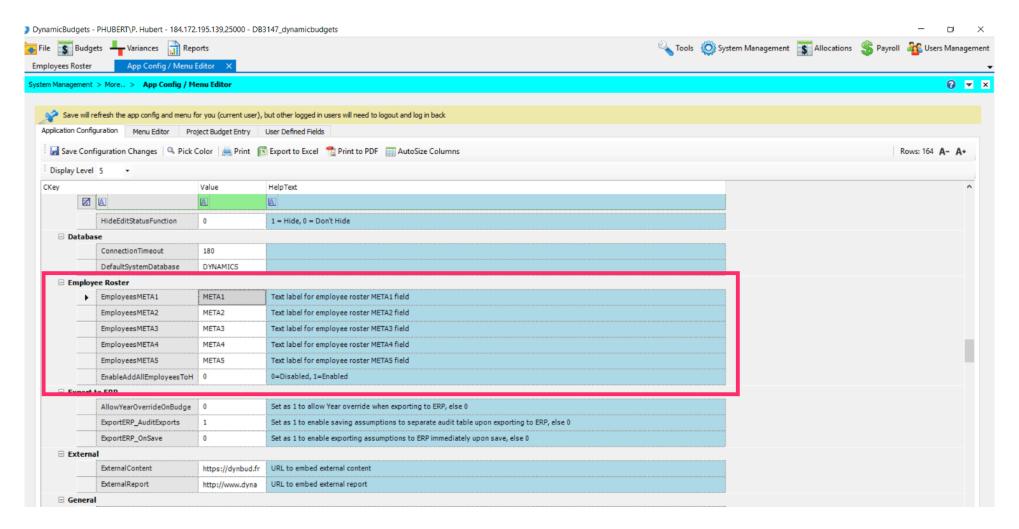
Scroll down until you find "Employee Roster."
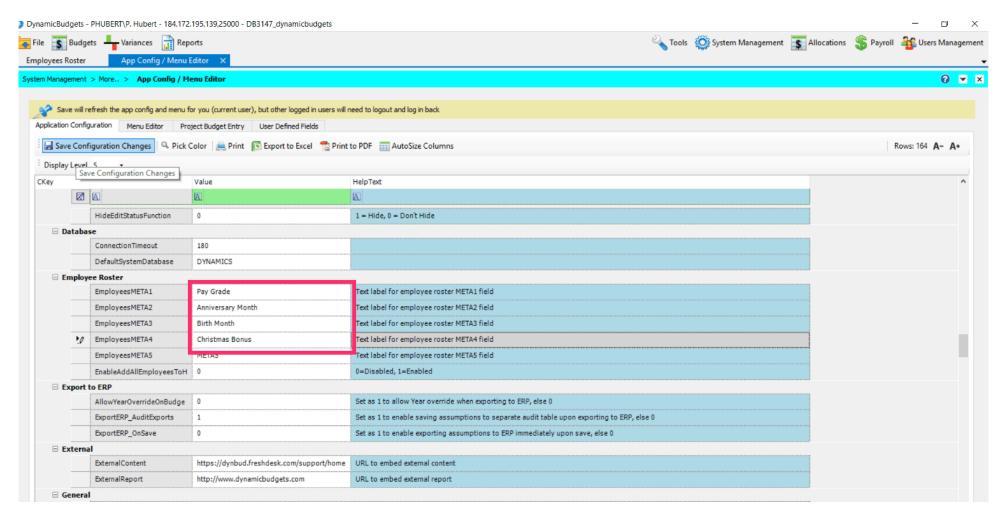
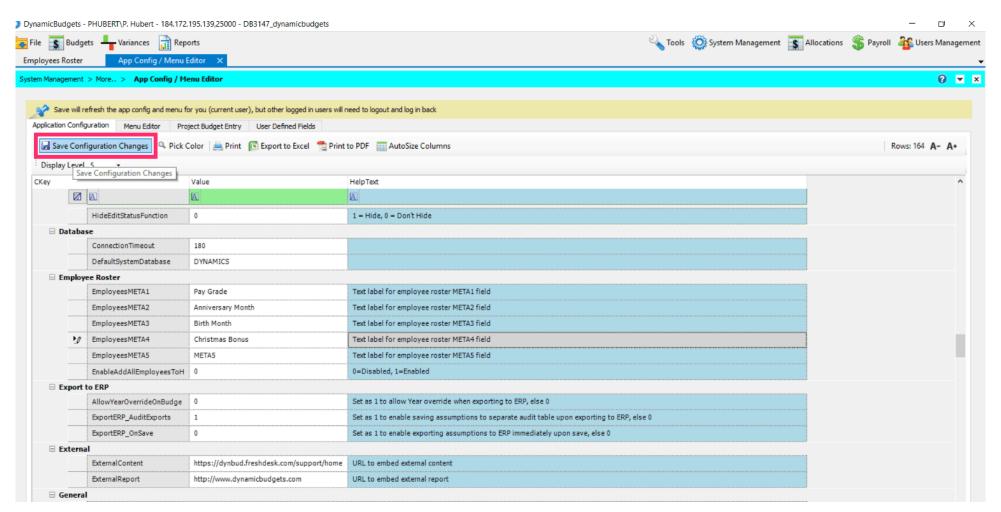Enter the appropriate header names for each META column.   Hit tab after each entry to make sure the change is accepted.

Now click on Save Configuration Changes. A message will appear that reads, "Saved Application Configuration Successfully."
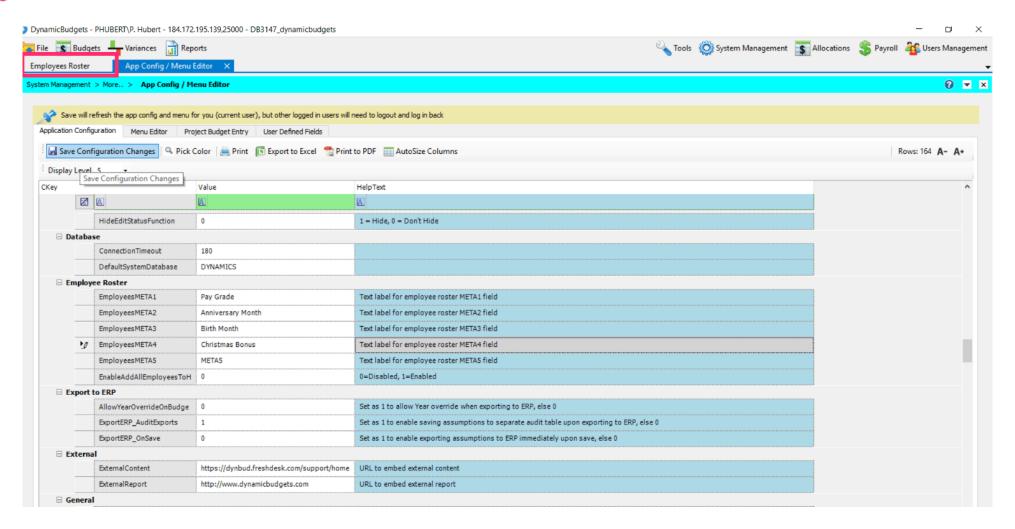
Click on the Employees Roster tab.
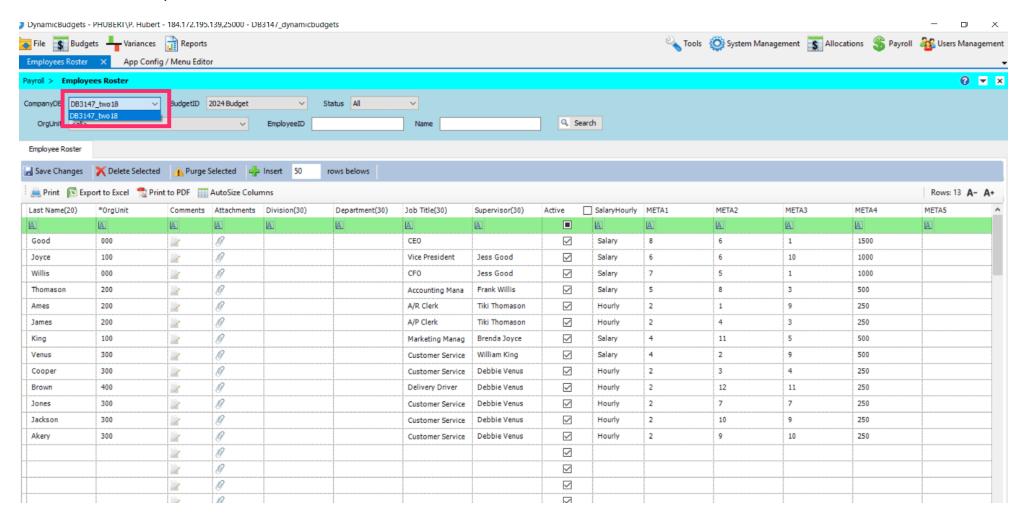
Click on the CompanyDB dropdown list. Select the company you were working in again. In this example, we will select DB3147_two18.
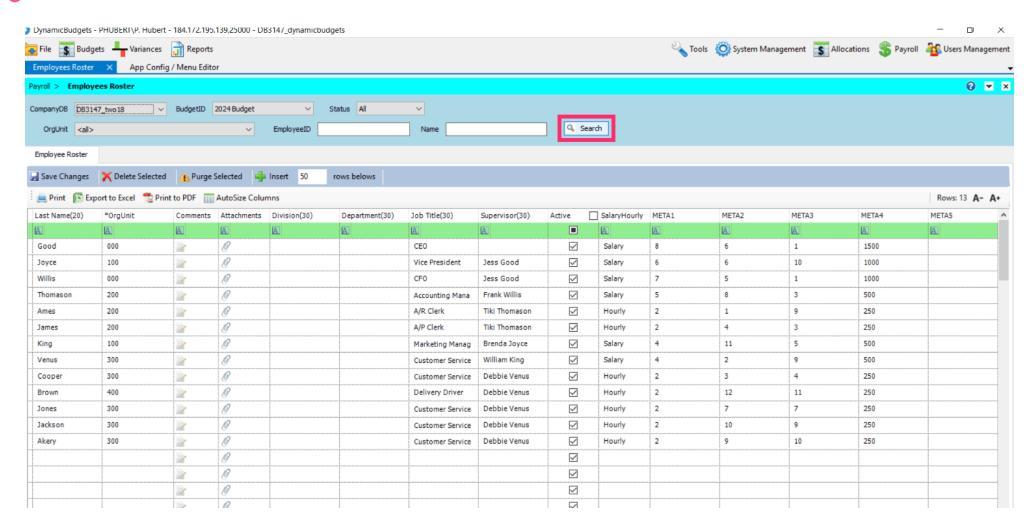
Click on **Search**.

Now you will see the updated custom META header names have been replaced with the names you entered in the previous screen.

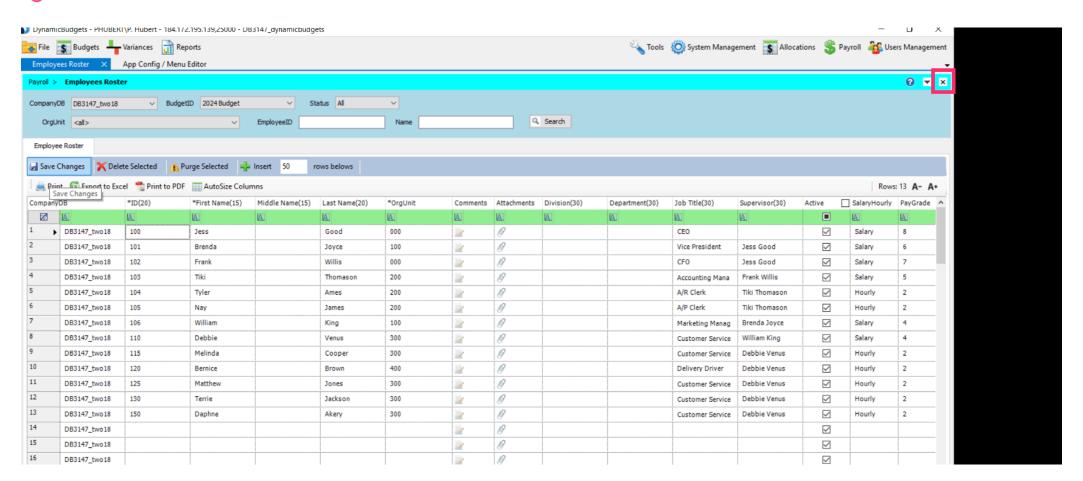| PayGrade	AnniversaryMonth	BirthMonth	ChristmasBonus	META5
8	6	1	1500	
6	6	10	1000	
7	5	1	1000	
5	8	3	500	
2	1	9	250	
2	4	3	250	
4	11	5	500	
4	2	9	500	
2	3	4	250	
2	12	11	250	
2	7	7	250	
2	10	9	250	
2	9	10	250	

Click on the X to close this window.

That's It. You're Done.