Pay-Net Online

Introduction

Navigation, Icons, and Features

Navigation

System Navigation

<Figure I.A>
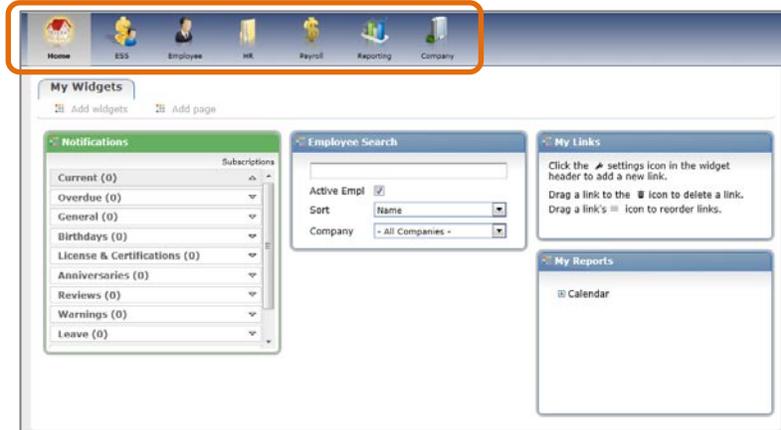
Navigating through system is accomplished through the use of icons along the top of the screen for each module accessible to the user login (based on security rights and service elections).

<Figure I.B>

Each module and category is often made up of many data screens to be populated. This is seen in the folder bars located in Employee, HR, and Reporting. The screen being displayed will be shown in charcoal gray in the folder lines.

Employee Navigation
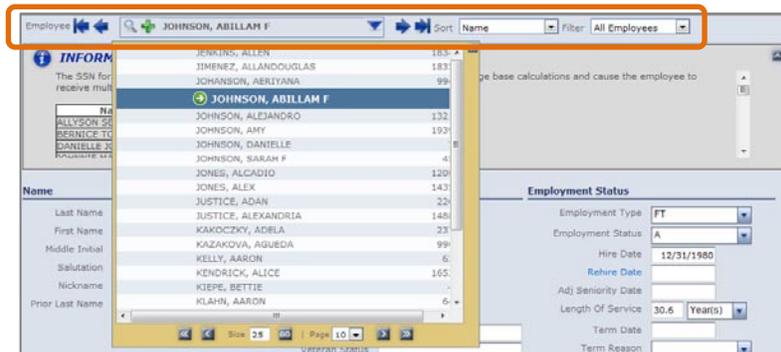
Along the top row of all employee screens, including payroll, are navigational arrows that move backwards (left-facing arrows) and forwards (right-facing arrows) through the list of employees. By clicking on the down arrow to the right of the employee's name, a list of employees will pop up to select from. The page size can be increased to show up to 500 employees at a time in the list. Directional arrows and a Page pull-down menu allow for moving through the list. Employees may also be sorted and filtered using the pull-down menus in the upper right corner of the screen.

<Figure I.C>

To find a specific employee the quickest, click into the name box and begin typing the last name of the person and options will begin to list for selection based on the entry. *** If sorting by other methods such as ID, the ID can be keyed as a searchable item. ***

<Figure I.D>
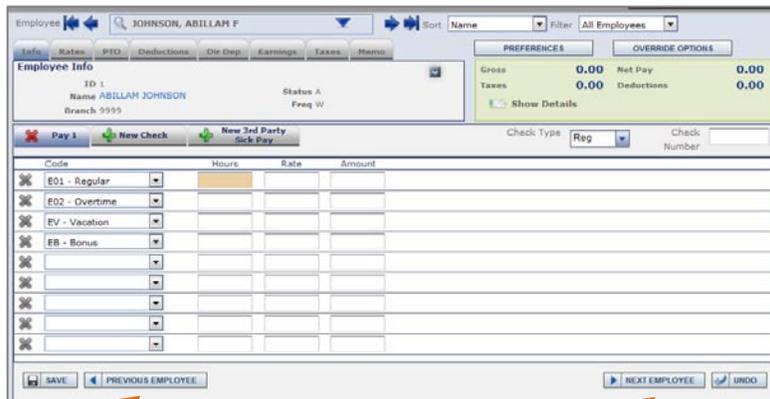
In the Employee Pay Entry screen, there are additional options for PREVIOUS EMPLOYEE and NEXT EMPLOYEE at the bottom of the screen for navigating through the employee list.

<Figure I.E>

When toggling between an employee's paycheck entry grid and their master file (Employee Data), a button will appear at the top of the Employee Data screen to go BACK TO PAYROLL ENTRY to simplify the process of going back into Payroll Entry.

Company Selection

To access other companies in the system (if permitted through security), simply click on the Company ID and Name at the top of the screen to get a pull-down menu. You may either select the company from the listing or begin

typing the company's name or ID in the search box.

Icons

The application employs several custom icons, buttons and headers that must be utilized to make use of the system. Listed below are the icons located throughout the application.

System Alert :
Notifies the user of a potential issue

Document Attachment :
Opens the chosen document on the Documents/Forms tab in the Home Module

Delete :
For deleting entries

Time Off Link :
Takes user to Time Off screen (from the Employee Search function in Employee Data)

Delete :
Deletes line item in pay entry grid

Warning :
Used in Payroll – Audit; signifies the batch has been approved and closed for further entry

Information Alert :
Notifies the user of a potential issue

Step :
Signifies a link on the Payroll – Start screen; also an upcoming step in the payroll process that is awaiting another step's completion

System Alert :
Provides information about the screen

Step/Include :
Signifies a step in the payroll process *OR* is used to select a line item to be included in a calculation

Add :
For adding additional entries

Go/Refresh :
Causes information to update on the screen (on the PTO History screen)

Search :
Takes user to Employee Search *OR* displays EE data in Payroll - Batch Entry

Link/Step :
Takes user to screen or link specified in the description next to the button

Refresh :
Updates the screen *OR* refreshes payroll verification tests

Add/Include :
For adding additional entries *OR* to show an entry is already included (on Manual Check screen)

Save :
Saves entries

Done/Included :
Signifies a step in the payroll process is complete *OR* shows the item being included in a calculation

View :
Opens the chosen entry for display on the screen

Remove/Block :
For removing entries *OR* blocking a tax code (on Manual Check screen)

Document :
Opens the chosen document

Run (Preview) Report :
Processes selected report; in the Reporting Module, it runs the report based on the Output Format option set up by the user

Edit :
Opens an entry for editing/updating

Save :
Saves entries made on page

Document :
Opens the chosen document

Save/Add New :
Saves entries made on page and opens another line for further coding

Run :
Opens Report Properties on a report (in Reporting Module)

Add :
Opens a new line entry on the page for further coding

Pay Rates Link :
Takes user to Pay Rates screen (from the Employee Search function in Employee Data)

Undo :
Reverts a page back to its last saved entries

Add New Paycheck/Pay History Link :
Adds a second check to an employee on the Payroll – Batch Entry screen *OR* takes user to Check History screen (from the Employee Search function in Employee Data)

Delete :
Removes an entry from a page

Features

Widgets

The first page displayed when entering the application is My Homepage/My Widgets, a user-defined convenience feature allowing one-click access to various features in the system, such as notifications, reports, and links.

Widgets in green are system widgets and cannot be removed. Widgets in blue can be deleted by toggling over their blue header bars and clicking the close ('X') button. In some cases, a widget can be refreshed by clicking the arrows icon and one can minimize and maximize a widget by clicking on the collapse ('-') or expand ('+') buttons that appear. Some widgets will contain a settings (wrench) button that allows the user to change options of the widget. Widgets can be added by clicking on the 'Add widgets' option in the upper left-hand corner of the My Widgets page. The placement of a widget on the page can be changed by clicking in the header and dragging it to a new area (shaded in red).

<Figure I.F>
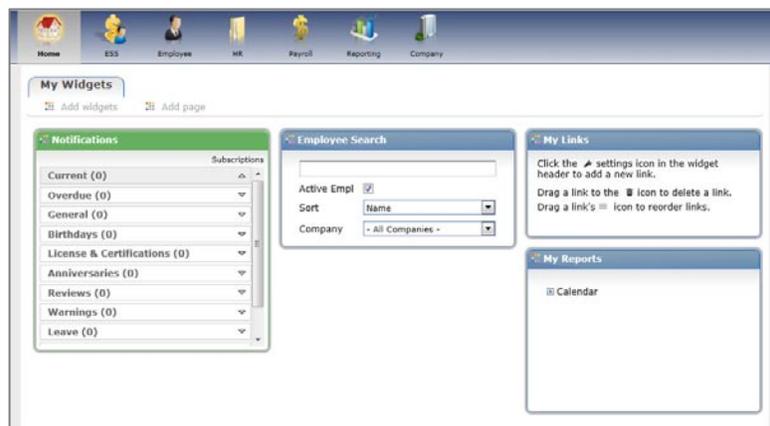
There are the four widgets available and data contained in them are based on the user (user preference):

Notifications   Reminders of expirations or upcoming events can be set up in the system to notify the user based on their setup. A subscription (one type of reminder covering all employees) can be added/changed/deleted using the link at the top of the categories listing. This will bring the user to the Home > Notifications > Subscriptions menu. In order for a subscription to be effective, employees must be set up with a specific date in Employee Date or Human Resources pertaining to the type of subscription. For instance, for the 'Employee Birthday' subscription, all employees should have the Birth Date field populated in Employee Data > Personal > Demographics. For the 'Employee Review' subscription to be effective, the Next Review Date field should be populated in Human Resources > Performance / Reviews > Reviews.

Notifications for a single employee can be entered by going to Home > Notifications > Message Center. Here, the specific event date 'Due Date' needs to be set, how many 'Days Before to Notify' needs to be specified for the notification to pop up and then the 'Type' of notification needs to be provided as well as the company it pertains to. To be able to toggle from the notification to the employee's information, be sure to enter their 'Employee ID' in the field provided, then type the 'Message' information for the notification (what the notification is for).

<Figure I.G>
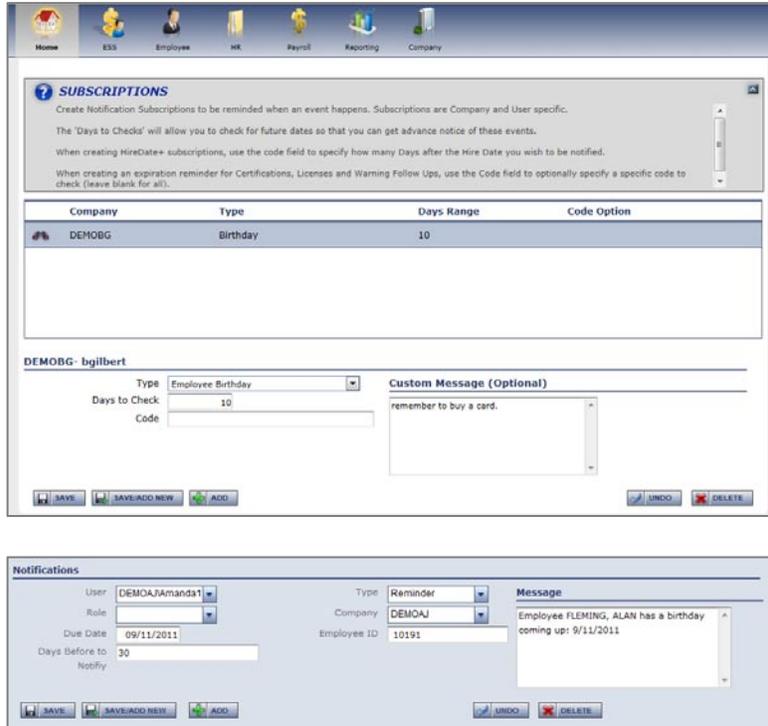
The widget shows all notifications that have become due to review ('Current', 'Overdue') and each section can be expanded or collapsed by clicking on its category header. There are also listings for each subscription type and the number of employees to review will appear in parentheses next to each type. All individual notifications set up in the Message Center will appear in the 'General' category.

<Figure I.H>
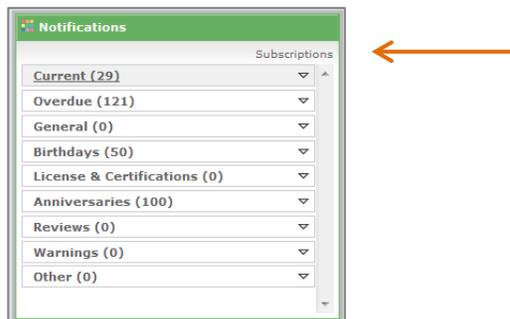
Employee Search This cross-company function allows the user to search for an employee in any company they have security rights to. As a name is entered, any employee in the system who has the entry as part of their name will appear in a selectable list. There are options here to look for active employees only ('Active Empl'), sort the list in one of the pre-set system sorts, and to search a specific company or all companies at once.

*** If sorting by other methods such as ID, the ID can be keyed as a searchable item. ***

<Figure I.J>
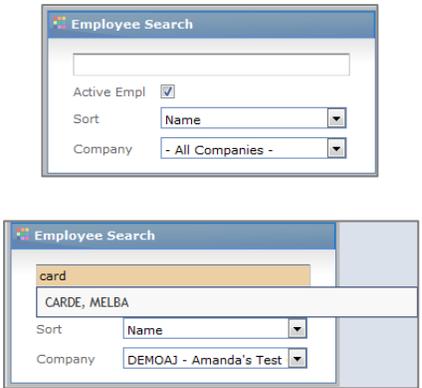
My Reports　　　　　Reports saved in the My Reports page in the Reports Module will be displayed in the widget. To add additional reports, they can be added through the widget settings or by going to the My Reports page in the Reports Module. To change the setting of a displayed report, click on the maximize ('+') button next to the specific report and then click the settings button (gear) to the left of the report.   To run the report as-is, simply click on the type of file to run (Excel, Word, text or pdf). To delete a report from My Reports, click on the delete (red 'X') button.

<Figure I.K>
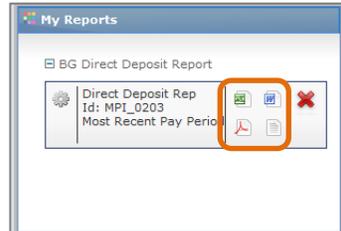
My Links　　　　　Links to areas of the system or external websites can be added through the widget. First, select the Settings (wrench) button from the blue header.


<Figure I.L>
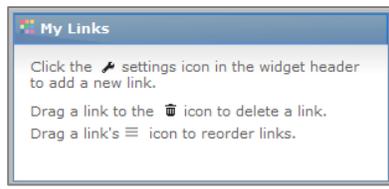
Next, choose the type of link to use (application or external site). For application links, select the area of the system to link to by maximizing the appropriate modules/tabs of the system. For an external website, enter a description (Title) for the widget display and then the URL.

<Figure I.M>
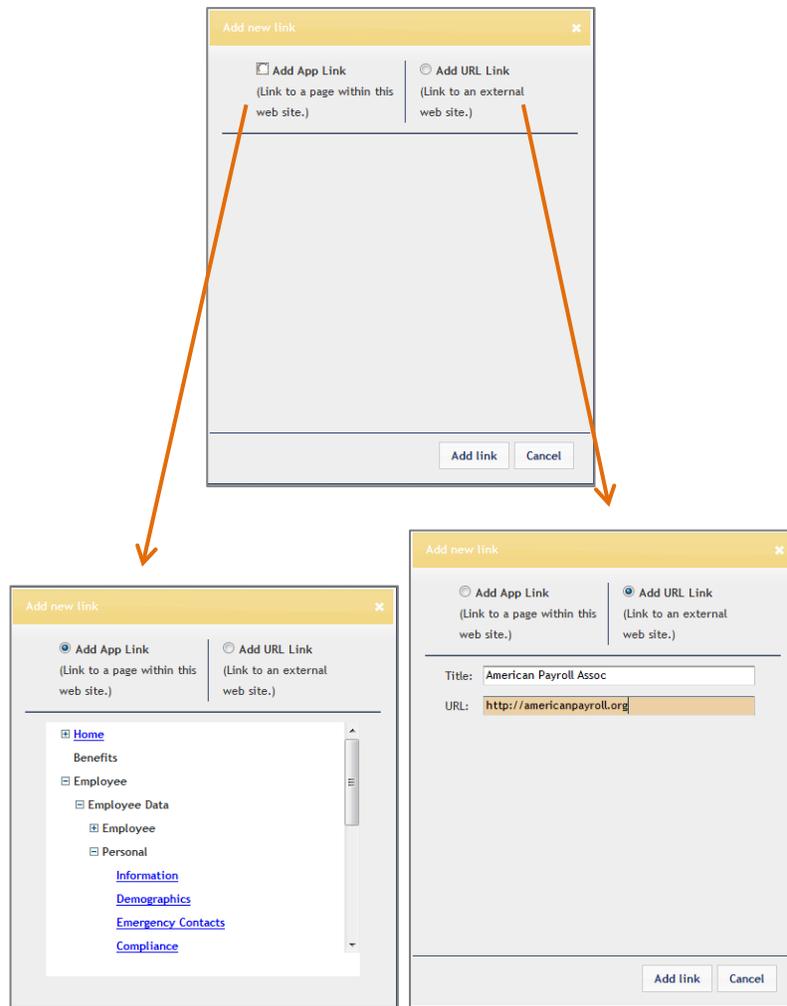
The link(s) will then appear in the widget. To remove one, click on it and drag it to the line of text at the bottom designating the delete area ('Drag link here to delete').

<Figure I.N>
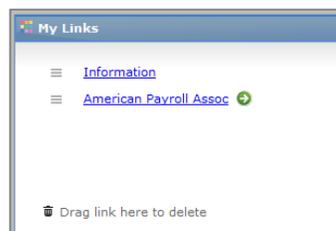
System Alerts   Global notifications to users of the system will appear in special red System Alert panel at the top of the screen when applied by the service bureau. These notifications may alert users to an outage or provide other information the service bureau deems important.

Upgrade Notification

A user accessing Pay-Net Online for the first time after an upgrade will see a pop-up alert box notifying them of the upgrade. The alert will display major changes and will have a link to see full Release Notes. Clients can dismiss the alert notification by pressing DISMISS NOTIFICATION. A new link in the lower right-hand corner of the screen links the user to the detailed Release Notes once the alert is dismissed.
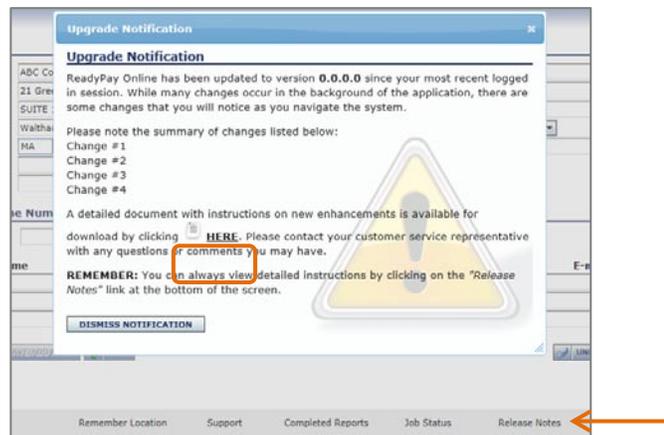
Single Sign-On

The application allows for single sign-on access for several vendor platforms the service bureau has partnered with. *** These are additional service offerings that may cause a change in billing. ***

Once a service offering has been set up for use, a new icon will appear in the Modules bar along the top of the application window. The first time clicking on the icon will take the user to their User Settings page to enter their 'Username' and 'Password' to the platform and will be saved for future use.

Automatic Log-Off

Should a user be idle in the application for 15 minutes, they will automatically be logged out and will need to re-enter their login information to gain access to the system.

Remember Location

As a default, the My Homepage > My Widgets page will be displayed when entering the system. To have the application remember the last screen a user was on and go back to that screen with the next log in, click on the Remember Location link at the bottom of the screen.