

How to set up a new employee

Go to **Human Res. & Payroll** menu option.

Select **Employee** from menu choices

Press **F3** key to get a new card and enter to get the next employee number from the Number Tables.

The screenshot shows the '255 - Employee Card' window with the 'General' tab selected. The fields are as follows:

No.	255	Search Name	
Job Title		Salespers./Purch. Code .	
First Name		Resource No.	
Last Name		Last Date Modified . . .	
Middle Name / Initial . .			
Suffix.			
Initials			
Phone No.			
Extension.			

Buttons at the bottom: Employee (dropdown), Payroll (dropdown), Help

Fill in the fields as required. These are highlighted in **yellow** in the following screen images. If a field is highlighted in **blue** this field is used if the new employee is a Service Technician.

Salespers./Purch. Code: lookup to the table to select the matching employee name and number

Resource No.: to the table to select the matching employee name and number

The screenshot shows the '255 - Employee Card' window with the 'General' tab selected. The fields are highlighted as follows:

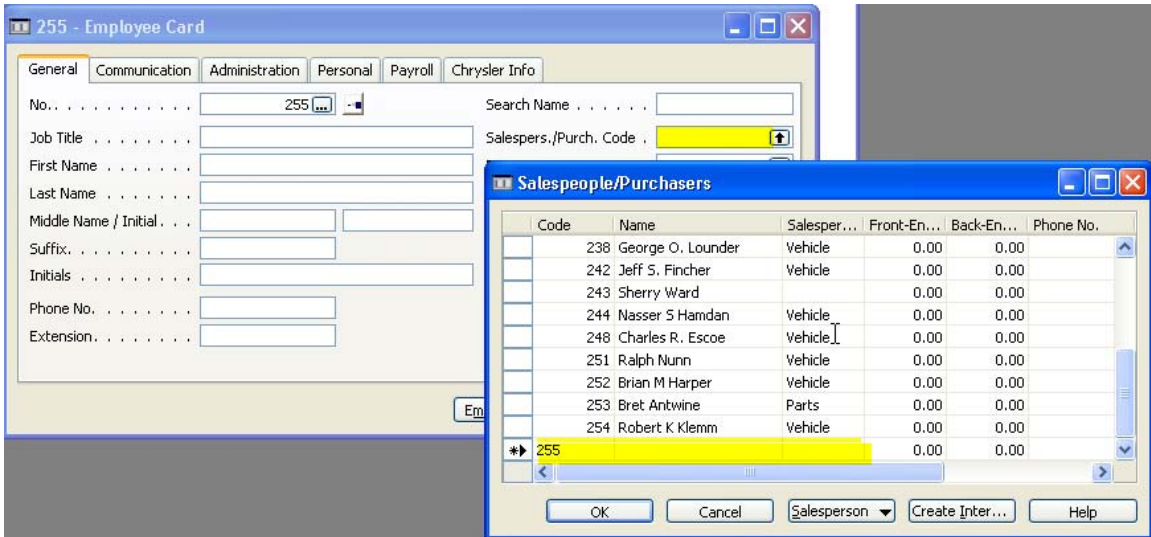
No.	255	Search Name	
Job Title		Salespers./Purch. Code .	
First Name		Resource No.	
Last Name		Last Date Modified . . .	
Middle Name / Initial . .			
Suffix.			
Initials			
Phone No.			
Extension.			

Buttons at the bottom: Employee (dropdown), Payroll (dropdown), Help

Salesperson / Purchaser:

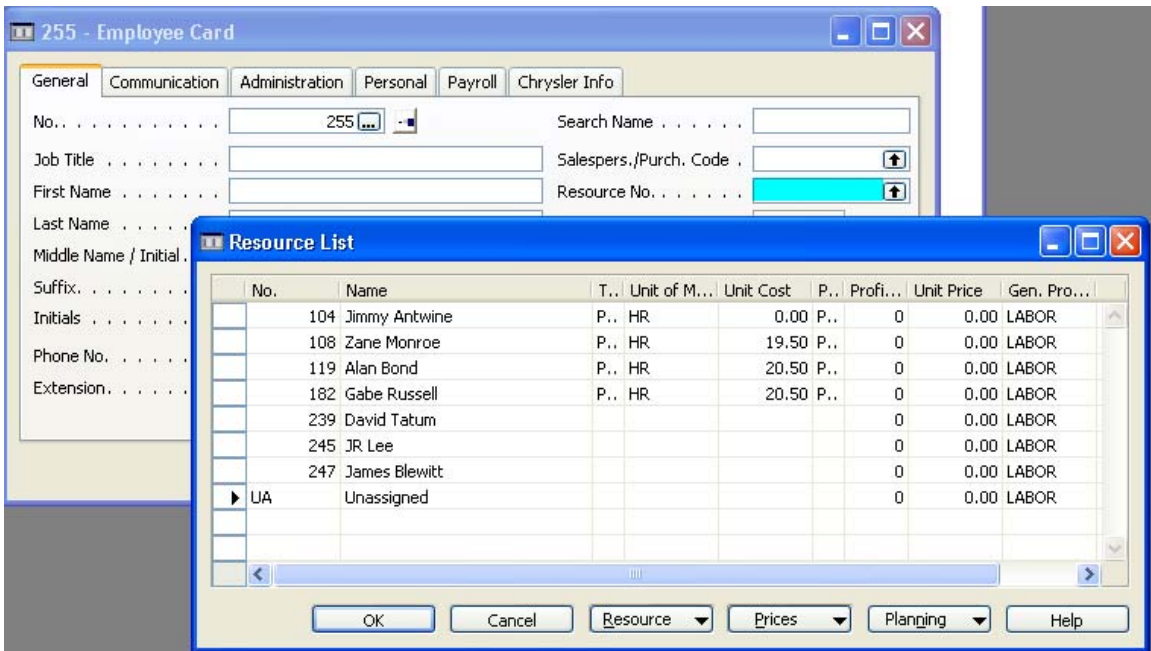
Code: this field must be filled in manually. Use the same number as the Employee Number.

Salesperson: use the lookup arrow to select what department this person is in. If an Clerical or Admin employee leave the field blank



Resource No.:

The up-arrow will take you to the resource list if the employee is listed select their number. If the employee is not listed, go to the Resource Card to add a new record. Use the Shift-F5 key combination to get to this area and F3 to get a blank record.



Adding a new Resource Card:

No.: fill this number in manually. Be sure it matches the Employee Number

The screenshot shows two overlapping SAP windows. The background window is titled '255 - Employee Card' and has tabs for 'General', 'Communication', 'Administration', 'Personal', 'Payroll', and 'Chrysler Info'. The 'General' tab is active, showing fields for 'No.' (255), 'Job Title', 'First Name', 'Last Name', 'Middle Name / Initial', 'Suffix', 'Initials', 'Phone No.', and 'Extension'. A 'Resource List' window is also visible, showing a list of resource numbers: 104, 108, 119, 182, 239, 245, 247, and a 'UA' entry. The foreground window is titled '255 - Resource Card' and has tabs for 'General', 'Invoicing', and 'Personal Data'. The 'General' tab is active, showing fields for 'No.' (255), 'Name', 'Type' (Person), 'Unit of Measure Code', 'Search Name', 'Resource Group No.', 'Blocked', and 'Last Date Modified'. At the bottom of the '255 - Resource Card' window are buttons for 'Resource', 'Prices', 'Planning', and 'Help'.

Go to the **Invoicing Tab:**

Direct Unit Cost: the employee's hourly rate plus a markup. You will need to discuss this with your Office Manager or Service Manager

Unit Cost: same as Direct Unit Cost

Gen. Prod. Posting Group: must be set to LABOR

This screenshot is similar to the first one, but the 'Invoicing' tab is selected in the '255 - Resource Card' window. The 'General' tab is still active, showing fields for 'Direct Unit Cost' (0.00), 'Indirect Cost %' (0.00), 'Unit Cost' (0.00), 'Price/Profit Calculation' (Profit=Price-...), 'Profit %' (Profit=Price-Cost), 'Unit Price' (0.00), and 'Tax Group Code'. On the right side, 'Gen. Prod. Posting Group' is set to 'LABOR', and 'Tax Prod. Posting Group' is empty. The 'Automatic Ext. Text' checkbox is unchecked. The 'Resource', 'Prices', 'Planning', and 'Help' buttons are visible at the bottom.

Go back to the Employee Card and continue to the other tabs.

The **Communications Tab** can be skipped if you wish. This tab only contains phone number.

Go to the **Administration Tab**:

The screenshot shows a window titled "255 - Employee Card" with a blue title bar and standard window controls. The "Administration" tab is selected, showing a form with the following fields:

Employment Date	<input type="text"/>	Union Code	<input type="text"/>
Status	Active <input type="button" value="v"/>	Union Membership No. . .	<input type="text"/>
Position	<input type="text"/>	Emplymt. Contract Code.	<input type="text"/>
Job Title	<input type="text"/>	Statistics Group Code . .	<input type="text"/>
Manager No.	<input type="text"/>	Workers Compensatio...	<input type="text"/>
Inactive Date	<input type="text"/>		
Cause of Inactivity Code	<input type="text"/>		
Termination Date	<input type="text"/>		
Grounds for Term. Code .	<input type="text"/>		

At the bottom of the form are three buttons: "Employee" (with a dropdown arrow), "Payroll" (with a dropdown arrow), and "Help".

Go to the **Personal Tab**:

The screenshot shows the same "255 - Employee Card" window, but with the "Personal" tab selected. The form contains the following fields:

Address	<input type="text"/>	Birth Date.	<input type="text"/>
Address 2.	<input type="text"/>	Sex.	<input type="text"/>
City	<input type="text"/>	Race	<input type="text"/>
State	<input type="text"/>		
ZIP Code	<input type="text"/>		
Country Code.	<input type="text"/>		
Home Phone No.	<input type="text"/>		

At the bottom of the form are three buttons: "Employee" (with a dropdown arrow), "Payroll" (with a dropdown arrow), and "Help".

Go to the **Payroll Tab**:

Payroll Group No.: select from the list provided

Resource Number: if the employee is a Service Technician the Resource Number (highlighted in blue) must be found in the Resource Table. Click the up arrow to find this employee's resource number. This should be the same as the number found on the General Tab

Default Work State: enter in your state's two letter abbreviation. Example: Georgia is GA. The lookup arrow is also available to select your state

If this employee is to receive a monthly bonus or their payroll is to be split between several chart of accounts numbers then check the boxes, as appropriate, highlighted in purple.

The screenshot shows a software window titled "255 - Employee Card" with a blue title bar and standard Windows window controls. The window contains several tabs: "General", "Communications", "Administration", "Personal", "Payroll", and "Chrysler Info". The "Payroll" tab is currently selected. The main area of the window is a form with the following fields and options:

Payroll Group No.	SERVICE TECH	↑	Blocked	<input type="checkbox"/>
Social Security No.	[Yellow box]		Statutory Employee	<input type="checkbox"/>
Resource No.	[Blue box]	↑	Retirement Plan	<input type="checkbox"/>
Default Work State	[Yellow box]	↑	Third-Party Sick Pay	<input type="checkbox"/>
Default Work Locality	[Empty box]	↑	Household Employee	<input type="checkbox"/>
Default Work Type Code.	[Empty box]	↑	Commission Pay	<input checked="" type="checkbox"/>
			GL Allocation of Pay	<input checked="" type="checkbox"/>

At the bottom of the window, there are three buttons: "Employee" with a dropdown arrow, "Payroll" with a dropdown arrow, and "Help".

Employee Tax Information

Go to **Payroll > Tax Information**

The Government Type field is used to determine the amount of Federal or State Income Tax to deduct per pay period based upon the Filing Status Code and Allowances. This information is found on the Employees Federal W-4 and State W-4 forms. This applies to the Codes Federal and State.

Also, this field can be left Blank. We have set this for use with other deductions such as Dental Insurance, Medical Insurance, Health Insurance and SIRA as shown in the example. The Filing Status Code field will have a lookup to a table that you can select the type of coverage the employee has selected. **These entries are required to be entered when you setup a new employee otherwise the payroll journal will not calculate and an error will result.**

The screenshot displays two windows from a payroll software application. The top window, titled '255 - Employee Card', has tabs for 'General', 'Communication', 'Administration', 'Personal', 'Payroll', and 'Chrysler Info'. The 'Payroll' tab is active, showing fields for employee number (255), search name, job title, first and last names, middle name/initial, suffix, initials, phone number, and extension. The bottom window, titled '255 - Employee Tax Info', contains a table for tax data. A mouse cursor is pointing to the 'Government Type' column header.

Government Type	State	Locality	Effective Date	Filing Status Code	Allowances	Income Tax Exempt	Extra Withholding	Credits/Other Deps.	Other Status
		Dental Insurance		FAMILY	0		0.00	0	
		Medical Insurance		FAMILY	0		0.00	0	
		SIRA Provider		NA	0		0.00	0	
Federal				MARRIED	2		0.00	0	
▶ State	GA			M ONEWORK	2		0.00		