



# Help Manual

© 2005 ... Networking Systems Solutions

# P.A.Y.H.R.

---

*by Networking Systems Solutions*

We at Networking Systems Solutions have recognized your need for the containment of payroll creation and human resource maintenance capabilities within one software package. Hence, the advent of P.A.Y.H.R. (Pay All Your Human Resources). The P.A.Y.H.R. application is designed to efficiently and effectively manage your company related information and process payroll information with relative ease.

# **P.A.Y.H.R. Pay All Your Human Resources**

**© 2005 ... Networking Systems Solutions**

All rights reserved. No parts of this work may be reproduced in any form or by any means - graphic, electronic, or mechanical, including photocopying, recording, taping, or information storage and retrieval systems - without the written permission of the publisher.

Products that are referred to in this document may be either trademarks and/or registered trademarks of the respective owners. The publisher and the author make no claim to these trademarks.

While every precaution has been taken in the preparation of this document, the publisher and the author assume no responsibility for errors or omissions, or for damages resulting from the use of information contained in this document or from the use of programs and source code that may accompany it. In no event shall the publisher and the author be liable for any loss of profit or any other commercial damage caused or alleged to have been caused directly or indirectly by this document.

Printed: August 2005 in Antigua

# Table of Contents

Foreword .....	1
<b>Part I Using Help</b> .....	<b>3</b>
1 Access Help .....	3
2 Navigate Help .....	3
3 Help Topics .....	4
<b>Part II About P.A.Y.H.R.</b> .....	<b>7</b>
1 Introduction .....	7
2 Objectives of P.A.Y.H.R. ....	7
3 P.A.Y.H.R. Architecture .....	8
4 Limiting Connections to the Server .....	8
<b>Part III P.A.Y.H.R. Menu</b> .....	<b>10</b>
1 Main Menu Items .....	10
<b>Part IV Employee Management</b> .....	<b>13</b>
1 Employee Overview .....	13
2 Add a New Employee .....	14
3 View and Edit Employee Information .....	15
View and Edit First Sub-View .....	15
View and Edit First Sub-View .....	15
View and Edit Second Sub-View .....	16
Positions Held.....	16
Leave Record.....	16
Qualifications.....	17
Salary History.....	18
Work Profile History.....	18
Payroll Info.....	19
Time Sheet .....	19
Income .....	20
Additional Incomes.....	20
Deductions .....	20
Additional Deductions.....	20
<b>Part V Timekeeping</b> .....	<b>22</b>
1 Time-Keeping .....	22
Daily View .....	22
Detailed View .....	23
<b>Part VI Payroll Management</b> .....	<b>26</b>
1 Payroll Creation Architecture .....	26
2 Payroll Management Overview .....	27

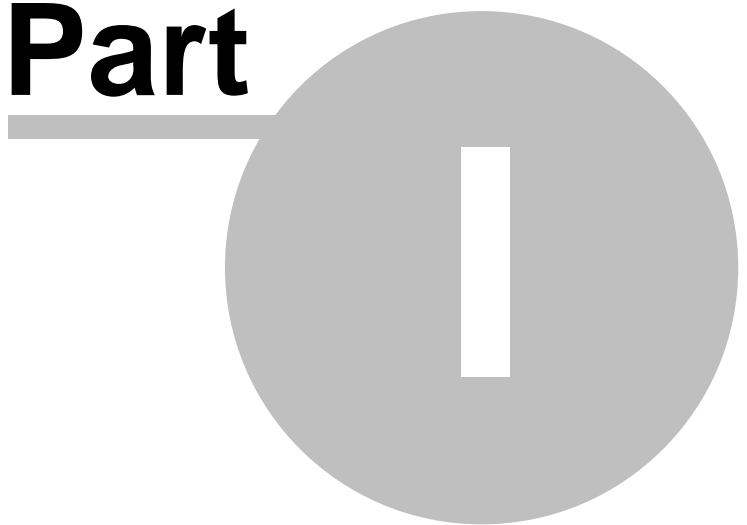
3	Create a New Payroll .....	28
4	View and Edit Payroll Information .....	29
	Payroll Info .....	29
	Time Sheet .....	29
	Income .....	30
	Deductions .....	30
<b>Part VII</b>	<b>Income and Deductions</b>	<b>33</b>
1	Processing Income and Deductions .....	33
<b>Part VIII</b>	<b>Income Management</b>	<b>36</b>
1	Incomes Overview .....	36
2	Create a New Income Category .....	37
3	View and Edit Income Information .....	37
<b>Part IX</b>	<b>Deduction Management</b>	<b>39</b>
1	Deductions Overview .....	39
2	Create a New Deduction .....	40
3	View and Edit Deductions Information .....	40
<b>Part X</b>	<b>Company Management</b>	<b>43</b>
1	Company Overview .....	43
2	Add a New Company .....	44
3	View and Edit Company Information .....	45
4	Work Profile Templates .....	45
<b>Part XI</b>	<b>Department Management</b>	<b>47</b>
1	Department Overview .....	47
2	Add a New Department .....	48
3	View and Edit Departmental Information .....	48
<b>Part XII</b>	<b>Report Management</b>	<b>50</b>
1	Reporting Structure .....	50
2	Reporting Manager .....	50
<b>Part XIII</b>	<b>Security</b>	<b>53</b>
1	Security System Overview and Architecture .....	53
2	Data Security .....	54
3	Add Users .....	55
4	Set User Permissions .....	55
5	Log User Off .....	55
6	Edit User .....	55

<b>Part XIV Common Manager Functions</b>	<b>57</b>
1 Find... ..	57
2 Delete... ..	57
<b>Part XV Working With Views</b>	<b>59</b>
1 Resizing Views .....	59
2 Columns and Grid Lines Within Views .....	59
3 Sort Lists in Views .....	60
4 Closing and Reopening Views .....	60
<b>Part XVI Shortcuts</b>	<b>62</b>
1 Keyboard Shortcuts .....	62
<b>Index</b>	<b>63</b>

# Foreword

P.A.Y.H.R. has the capabilities of performing all operations relevant to payroll calculation, including processing of incomes and deductions. All calculations of the P.A.Y.H.R. system are performed in accordance with the rules of payments within Antigua and Barbuda. P.A.Y.H.R. is, however, a modular system and as such location specific rules can be substituted to suit the preferences of the users.

**Part**





# 1 Using Help





## 1.1 Access Help

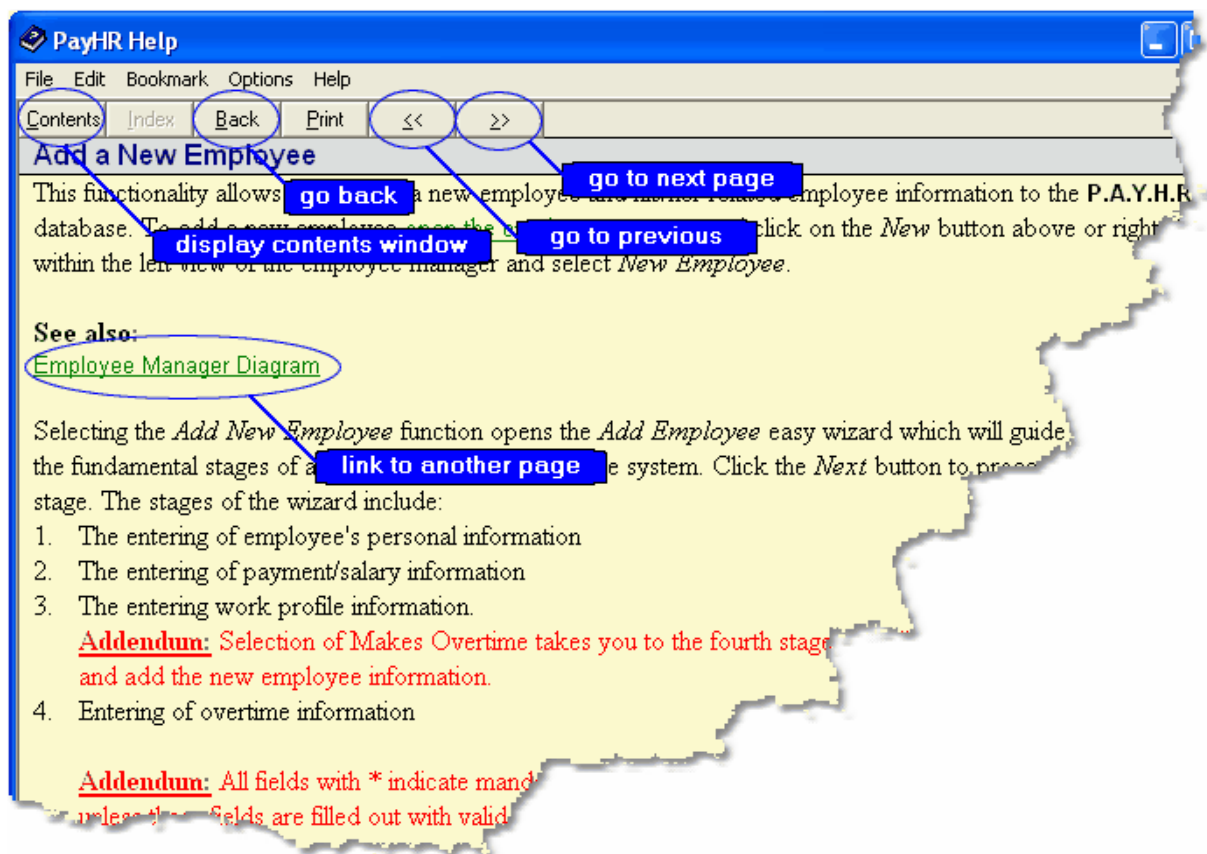
The Help file may be accessed from the main menu at the top of the **P.A.Y.H.R.** application. Click on *Help - P.A.Y.H.R. Help or About P.A.Y.H.R.* This opens the [Help Topics](#) window. For your convenience the help file has been integrated into the application and, at any view of the application, pressing the F1 key will open the help manual to the topic specific to that view.

**See also:**

[Navigate Help](#)

## 1.2 Navigate Help

You may navigate through the **P.A.Y.H.R.** Help directly from the *Help Topics* window or from the main **P.A.Y.H.R.** Help window. Click  or  on the main Help Manual window to go back to previous topics or  to go forward to the next topic. Click on links in green to view related topics. To reopen the *Help Topics* window from the main *Help Window* click on .



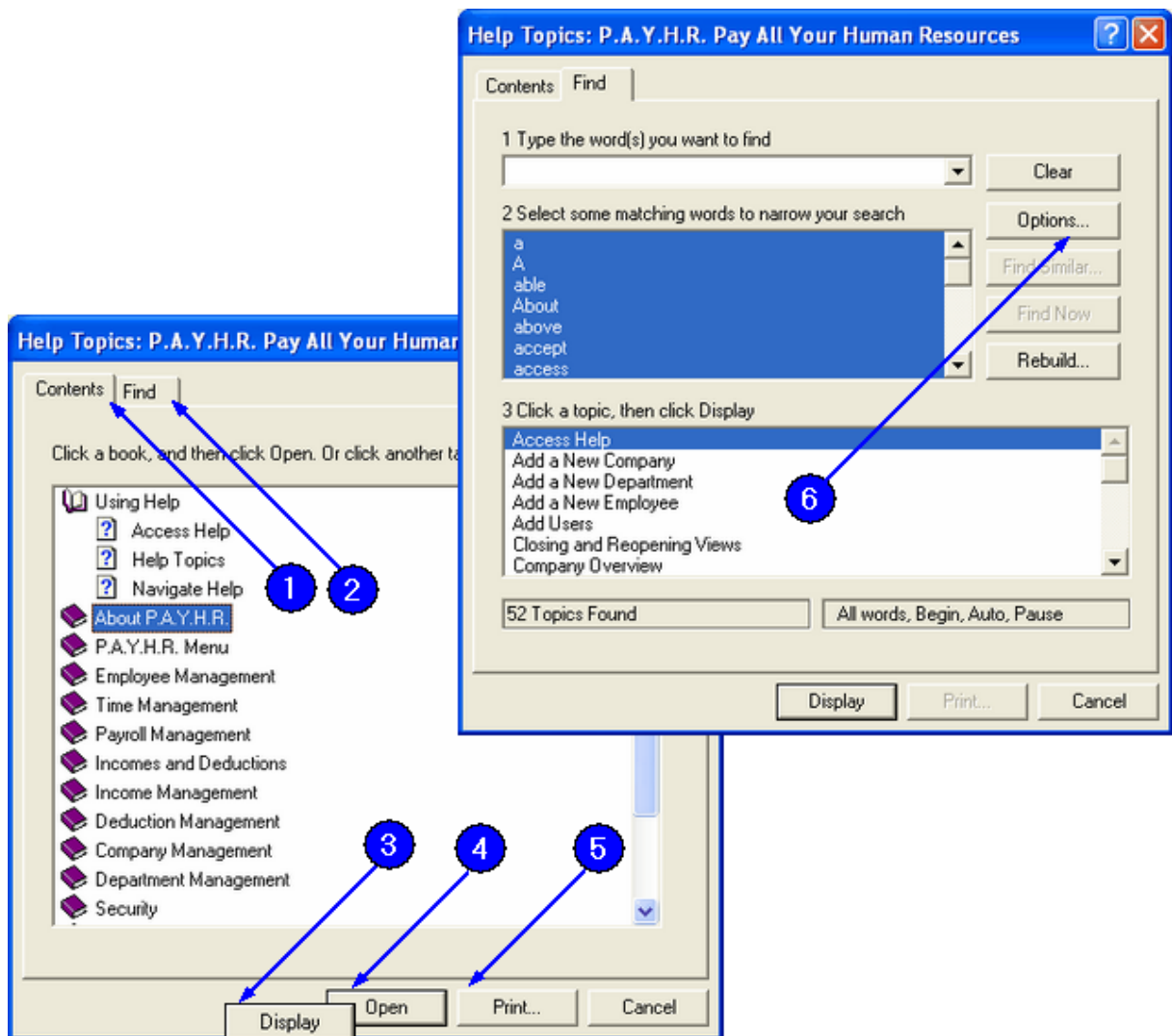
[P.A.Y.H.R. Help Window](#)

## 1.3 Help Topics

In the *Help Topics* window you are able to view the contents of the help manual by clicking on the *Contents* (1) tab or you may search for a specific word or key words by clicking on the *Find* tab (2). Click *Print* (5) to print the topics in the *Help Topics* window.

In the *Contents* window select a topic from the *Contents* list. To view Help Manual information select a topic having a ? icon and click on the *Display* (3) button to open the **P.A.Y.H.R. Help** window, or select a topic having a book icon and click on *Open* (4) to open the sub-topics of this topic. You may alternately double click on these items.

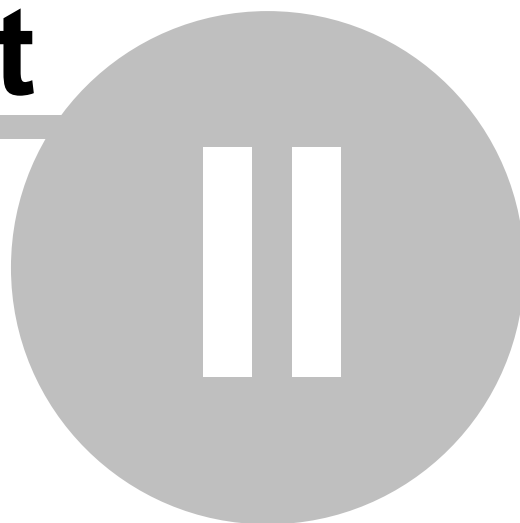
In the *Find* window type in the word(s) you want to find, select a matching word or phrase and a related topic and click *Display* to display the information under this topic. Click *Options* (6) to specify your search options.



[P.A.Y.H.R. Help Topics Window](#)

# Part

---



## 2 About P.A.Y.H.R.

### 2.1 Introduction

**P.A.Y.H.R.** (**Pay All Your Human Resources**) is a software package designed to encompass the processing of Human Resources as well as the payroll information of an establishment. It maintains basic information on employees and information concerning salaries and wages and processes incomes and deductions in productions of payroll. Though **P.A.Y.H.R.** is universally portable, the design of this software is so far specific to organizations within Antigua and Barbuda, hence, payroll calculations are performed in conformance with the rules of these various organizations. Being a modular system, however, location-specific rules can be substituted to satisfy your preferences.

**P.A.Y.H.R.** is functional in three versions:

- Standalone
- Enterprise
- Service

In the Standalone version this software includes a server. However, this server will only accept connections from a client on the same machine. The client, in turn, will only connect to a server on a machine having an identical IP address. The database to be used in the standalone version is a client database.

The Enterprise version, though similar to the standalone, will however, allow clients to connect from different machines. The database to be used in the Enterprise version is a desktop database where the client has the option of using his/her own database server or can be supplied with a server.

The Service version is similar to the enterprise version but the client software is web based. The Service version uses a Firebird or MySQL database.

### 2.2 Objectives of P.A.Y.H.R.

From the broader spectrum the **P.A.Y.H.R.** software package aims to offer you the functionalities of:

- Maintenance of basic information on employees
- Maintenance of information on salaries and wages
- Calculation of deductions for medical benefits
- Calculation of deductions for social security
- Calculation of deductions for education levy
- Subtractions of additional deductions
- Addition of affixed incomes
- Calculation of payroll

**Addendum:**

- Payroll is calculated in accordance with the rules of the various organizations within Antigua and Barbuda

More explicitly with regards to Human Resource information **P.A.Y.H.R.** will be able to collect data regarding:

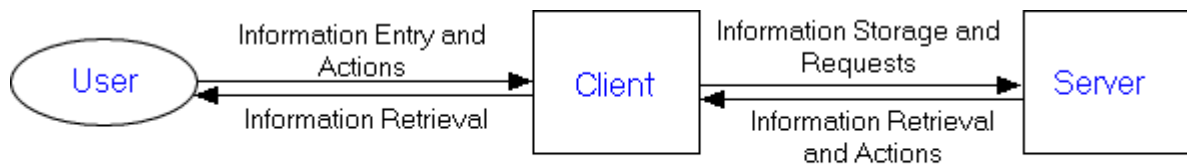
- Educational qualifications
- Training qualifications
- Salary information
- Overtime payment information
- Work profile history information

- Leaves and leave requests
- Holiday Information

**Important!** Collection of proper and valid Human Resource information is vital as it will contribute to the calculation of the payroll information.

## 2.3 P.A.Y.H.R. Architecture

The **P.A.Y.H.R.** software is built according to a client-server model. It supports a server which is responsible for the logical operations of the application. There additionally, exists a client which connects to the server and allows for information to be sent to and retrieved from the server. It is with the client of the application that users of the system will interact. The basic architecture of the system is summed in the following diagram:



[Basic Software Architecture](#)

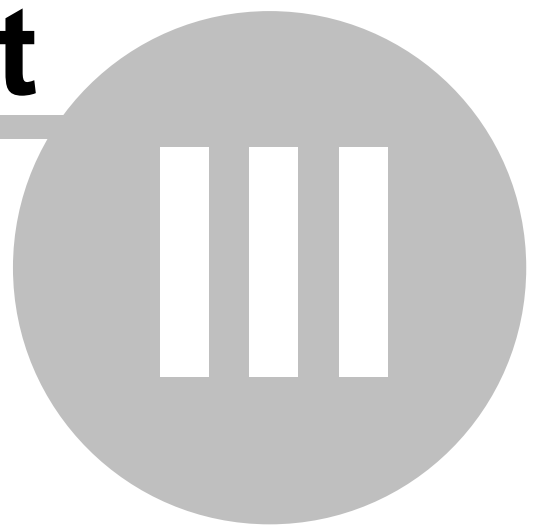
## 2.4 Limiting Connections to the Server

An integral part of the software is limiting access to the server. This limited access is in two specific ways:

1. Limiting a specific number of clients to a server
2. Limiting access to the server only from a specific IP address.

# Part

---



## 3 P.A.Y.H.R. Menu

### 3.1 Main Menu Items

The **P.A.Y.H.R.** menu is located to the left of the application window. The menu contains links to the main views and functionalities of the system. The **P.A.Y.H.R.** menu items include:

1. **H.R.** category under which are listed:

- [Employee](#)
- [Time Keeping](#)

2. **Payroll** category under which are listed:

- [Payroll Management](#)
- [Income Categories](#)
- [Deduction Categories](#)

3. **Maintenance** category under which are listed:

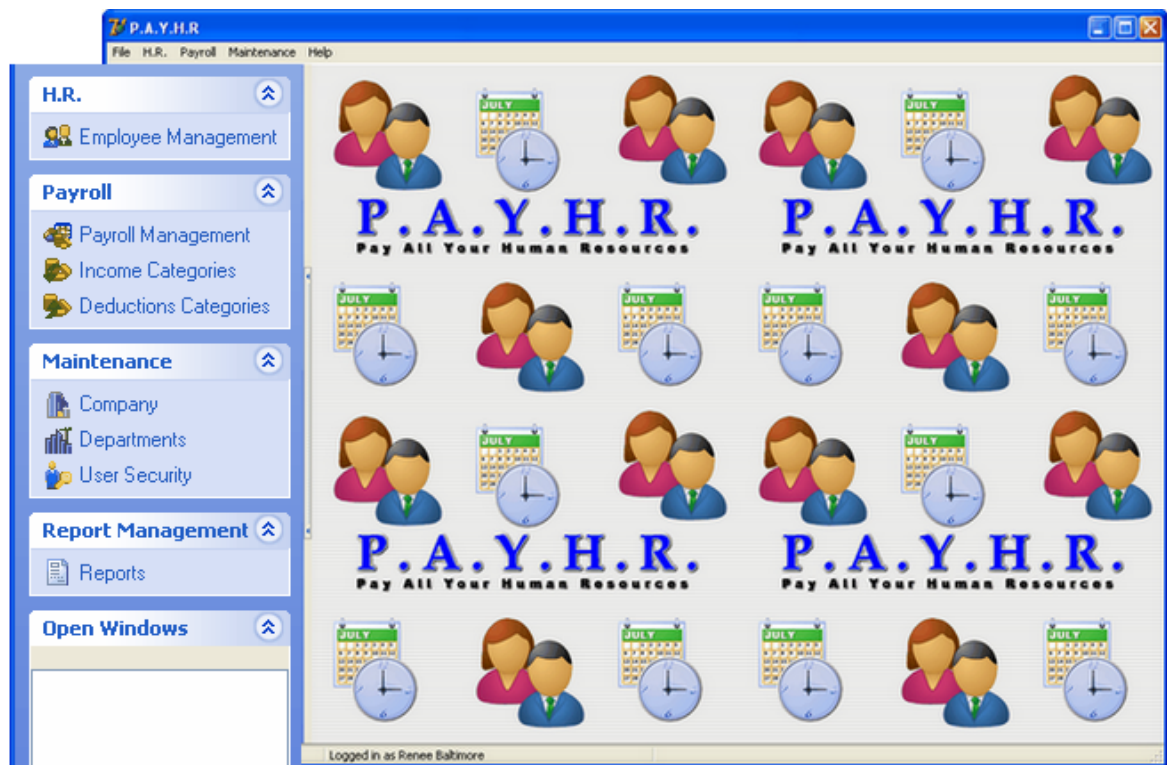
- [Company](#)
- [Departments](#)
- [User Security](#)

4. **Report Management** under which is listed:

- [Reports](#)

5. The **P.A.Y.H.R.** Menu also maintains an **Open Windows** box which keeps track of all the managers presently open.





[PAYHR Menu](#)

**Part**

---

**IV**

## 4 Employee Management

### 4.1 Employee Overview

The system maintains basic human resource as well as payment information on each of its employees. New employee information may be added or existing employee information may be edited. Employee information may be accessed by clicking on the *Employee Management* link appearing under *HR* in the menu to the left or selecting *H.R. - Employee Management* from the main menu above. Clicking on Employee Management will open the *Employee Manager* in the right section of the window. The employee manager is displayed in two views: the left view which lists the employees and the right view which displays detailed employee information. From the employee manager you are able to:

- [Add a New Employee](#)
- [Delete an Existing Employee](#)
- [Find an Employee](#)
- [Sort Employees](#)
- [View and Edit Employee Information](#)

The diagram illustrates the 'Employee Manager' interface, divided into a 'Left View' and a 'Right View'.

**Left View:** A table listing employees with columns for ID Number, First Name, and Last Name.

ID Number	First Name	Last Name
10000025	Michael	Charles
100000514	Dwight	Massiah
100000513	Therese	Archibald
100000510	Kenile	Browne
100000504	Nelson	Simon
12345	Selvin	Simon
100000509	Neel	Edwards

**Right View:** A form for 'Employee Details' for employee 12345-Selvin, Simon. It includes tabs for Personal Info, Salary, Work Profile, and Overtime Information.

**Personal Info:**

- \*Employee ID: 12345
- \*First Name: Selvin
- \*Last Name: Simon
- Middle Initials: N
- \*Date Of Birth: 6/ 6/1973
- \*Gender: Male
- Marital Status: Single
- \*Social Security: 12345
- \*Medical Benefits: 12345
- \*Education Levy: 12345
- Address1: None
- Address2: None
- City: None
- \*Country: antigua
- Telephone: 123-4567
- E-Mail: selvin@none.com
- Status: Active
- Can be seen by: Data Entry

**Positions Held:**

Start Date	End Date	Department	Position	Current
2/1/2005	2/1/2005	202 - Accounts	Accountant	Yes

Callouts and labels include: 'Close Employee Manager', 'Add a New Employee', 'Find an Employee', 'Delete an Employee', 'Sort Employees', 'Save Employee Details', 'Close Employee Details', 'First Sub-View', 'Second Sub-View', 'Left View', and 'Right View'.

Employee Manager Diagram

## 4.2 Add a New Employee

This functionality allows you to add a new employee and his/her related employee information to the **P.A.Y.H.R.** database. To add a new employee [open the employee manager](#) and click on the *New* button above or right click within the left view of the employee manager and select *New Employee*.

Selecting the *Add New Employee* function opens the *Add Employee* easy wizard which will guide you through the fundamental stages of adding a new employee to the system. Click the *Next* button to proceed to the next stage. The stages of the wizard include:

1. The entering of employee's personal information
2. The entering of payment/salary information

3. The entering work profile information.

**Addendum:**

- Selection of *Makes Overtime* takes you to the fourth stage else click *Finish* to exit the wizard and add the new employee information.

4. Entering of overtime information

**Addendum:**

- All fields with \* indicate mandatory information. The wizard will not proceed to the next phase unless these fields are filled out with valid information.

At any stage of the wizard you may choose to cancel the addition of a new employee by clicking on *Cancel*. You have the option to navigate through the wizard to review or edit information by clicking the *Back* button or by clicking on a desired stage on the right menu of the wizard.

Click *Finish* to add the information to the **P.A.Y.H.R.** database and exit the Add Employee wizard. A message should appear on the screen to indicate if the employee information has been added successfully or if an error has occurred.

**See also:**

[Employee Manager Diagram](#)

## 4.3 View and Edit Employee Information

To view and edit employee information [open the employee manager](#) and [find the employee\(s\)](#) and double click on that employee. If this information is already open you may click on that employee's tab at the bottom of the employee manager or double-click on the employee to revert to the previously opened view. This information will be displayed in two sub-views within the right view of the employee manager.

**See also:**

[View and Edit First Sub-View](#)

[View and Edit Second Sub-View](#)

### 4.3.1 View and Edit First Sub-View

#### 4.3.1.1 View and Edit First Sub-View

In the first sub-view employee's *Personal Information* may be viewed and edited and *Salary*, *Work Profile* and *Overtime* information may be viewed only. These may be accessed by clicking on their individual tabs at the top of the sub-view.

Changes made to and employee's personal information may be saved by clicking the *Save* button above the sub-view.

**Addendum:**

- All mandatory fields (fields marked with \*) must be filled with valid information before employee information can be saved.

**See also:**

[Employee Manager Diagram](#)

### 4.3.2 View and Edit Second Sub-View

The second sub-view in the right side of the employee manager displays information pertaining to the employee's *Positions Held*, *Leave Record*, *Qualifications*, *Salary History* and *Work Profile History*. These may be accessed by clicking on the tabs at the top of the sub-view.

**See also:**

[Employee Manager Diagram](#)

#### 4.3.2.1 Positions Held

This functionality allows you to view and to edit the positions held by the employees in the system.

To add a new position assignment click on the *New Assignment* tab at the top of the sub-view or right-click within the sub-view and select *New Assignment*. This opens an *Add Assignment* window where you must enter the requested information.

**Addenda:**

- All mandatory fields (fields marked with \*) must be filled out with valid information before assignment can be saved.
- Ensure that the *End Date* field of the new assignments does not contain a date occurring subsequent to the date entered in the *Start Date* field.
- No two assignments can be current simultaneously. If an assignment is made to be current then the *Current* fields of all others will be automatically set to *No*.
- No two assignment periods may be made to overlap.
- A current position assignment may not possess an *End Date*. The *End Date* of a position may be set by editing the assignment after the position is no longer current.

Click *Save* to save the new information or *Cancel* to cancel the new assignment.

To edit a position assignment you may select the desired assignment and click the *Edit Assignment* tab above to open the *Edit Assignment* window. You may alternately right click on the assignment and select *Edit Assignment*. Click *Save* to save the edited information or *Cancel* to leave the information unchanged.

To delete an assignment select the desired assignment and click the *Delete Assignment* tab above or right click on the assignment and select *Delete Assignment*.

Click on the *Update View* tab to view updated information. This, however, should be done automatically by the employee manager.

**See also:**

[Employee Manager Diagram](#)

#### 4.3.2.2 Leave Record

This functionality allows you to view and to edit periods of leave previously taken or to be taken by the employees on the system.

To add a new leave period click on the *New Leave* button at the top of the sub-view or right-click within the sub-view and select *New Leave*. This opens an *Add Leave* window where you must enter the requested information.

**Addenda:**

- Ensure that the *End Date* field of the new leave does not contain a date occurring subsequent to the date entered in the *Start Date* field.
- No two leave periods may be made to overlap.

Click *Save* to save the new information or *Cancel* to cancel the new leave.

To edit a leave you may select the desired leave and click the *Edit Leave* tab above to open the *Edit Leave* window. You may, alternately, right click on the Leave and select *Edit Leave*. Click *Save* to save the edited information or *Cancel* to leave the information unchanged.

To delete a leave select the desired leave and click the *Delete Leave* tab above or right click on the leave period and select *Delete Leave*.

Click on the *Update View* tab to view updated information. This, however, should be done automatically by the employee manager.

**See also:**

[Employee Manager Diagram](#)

#### 4.3.2.3 Qualifications

This functionality allows you to view and to edit the qualifications of the employees on the system with regards to education and training. The qualifications view is further divided into two subviews, the first displaying Certificates and Diplomas/Degrees attained and the second displaying the courses associated with a selected Certificate/Diploma/Degree.

To add a new qualification click on the *New Qualification* button at the top of the sub-view or right-click within the sub-view and select *New Qualification*. This opens a three step *Add Qualification* wizard which will guide you through the fundamental stages of adding a new qualification. Click *Next* to proceed to the next stage of the wizard.

**Addenda:**

- All mandatory fields (fields marked with \*) must be filled out with valid information before assignment can be saved.
- Ensure that the *Date Issued* field does not contain a date subsequent to the present date.

At any stage of the wizard you may choose to cancel the addition of a new qualification by clicking on *Cancel*. You have the option to navigate through the wizard to review or edit information by clicking the *Back* button or by clicking on a stage on the right menu of the wizard.

Click *Finish* to save the new qualification and exit the wizard or *Cancel* to cancel the new qualification.

Courses associated with a qualification may be added, edited or deleted in step 3 of the *Add/Edit Qualification* wizard or directly from the Employee Manager. To add courses click on the *Add Course* tab in the wizard or in the employee manager, in the *Courses* view right click on a course associated with the specific Certificate/Diploma/Degree and select *New Course*. To edit a course select the desired course and click the *Edit Course* tab or right click on the course and select *Edit Course*. To delete a course select the desired course and click on *Delete Course* or right click on the course and

select *Delete Course*.

To edit a qualification you may select the desired qualification and click the *Edit Qualification* tab above to open the *Edit Qualification* wizard. You may alternately right click on the qualification and select *Edit Qualification*. Click *Finish* to save the edited information and exit the wizard or *Cancel* to leave the information unchanged.

To delete a qualification select the desired qualification and click the *Delete Qualification* tab above or right click on the qualification period and select *Delete Qualification*.

To view and edit *Certificates*, *Diplomas/Degrees* and *Courses* in the Employee Manager click on their respective tabs in the menu to the right of the sub-view.

Click on the *Update View* tab to view updated information. This, however, should be done automatically by the employee manager.

**See also:**

[Employee Manager Diagram](#)

#### 4.3.2.4 Salary History

This functionality allows you to view and to edit salary history information associated with the employees on the system.

To add a new salary, click on the *New Salary* tab at the top of the sub-view or right-click within the sub-view and select *New Salary*. This opens a *New Salary/Wage* window where you must enter the requested information.

**Addenda:**

- No two salaries can be current simultaneously. If a salary is made to be current then the *Current* fields of all others will be automatically set to *No*.
- A current salary may not start before a salary which has previously been made current.
- A current salary may not possess an End Date. The End Date of a salary may be set by editing the salary after the salary is no longer current.

Click *Save* to save the new information or *Cancel* to cancel the new salary.

To edit a salary you may select the desired salary and click the *Edit Salary* tab above to open the *Edit Salary* window. You may alternately right click on the salary and select *Edit Salary*. Click *Save* to save the edited information or *Cancel* to leave the information unchanged.

To delete a salary select the desired salary and click the *Delete Salary* tab above or right click on the salary and select *Delete Salary*.

Click on the *Update View* tab to view updated information. This, however, should be done automatically by the employee manager.

**See also:**

[Employee Manager Diagram](#)

#### 4.3.2.5 Work Profile History

This functionality allows you to view and to edit the work profile history of the employees on the system.



To add a new work profile click on the *New Work Profile* tab at the top of the sub-view or right-click within the sub-view and select *New Work Profile*. This opens a *New Work Profile* window where you must enter the requested information. You may also select a predefined [work profile template](#) by selecting a category from the *Load From Template* field of the *New Work Profile* window.

**Addenda:**

- All mandatory fields (fields marked with \*) must be filled out with valid information before work profile can be saved.
- Selection of *Makes Overtime* opens a new tab *Overtime Info* in the *New Work Profile* window.
- A current work profile may not start before a work profile which has previously been made current.
- No two work profiles can be current simultaneously. If a work profile is made to be current then the *Current* fields of all others will be automatically set to *No*.
- A current work profile may not possess an End Date. The End Date of a work profile may be set by editing the work profile after the work profile is no longer current.

Click *Save* to save the new information or *Cancel* to cancel the new work profile.

To edit a work profile you may select the desired work profile and click the *Edit Work Profile* tab above to open the *Edit Work Profile* window. You may alternately right click on the work profile and select *Edit Work Profile*. Click *Save* to save the edited information or *Cancel* to leave the information unchanged.

To delete a work profile select the desired work profile and click the *Delete Work Profile* tab above or right click on the work profile and select *Delete Work Profile*.

Click on the *Update View* tab to view updated information. This, however, should be done automatically by the employee manager.

**See also:**

[Employee Manager Diagram](#)

#### 4.3.2.6 Payroll Info

This functionality allows you to view and to edit an employee's payroll information. This entails information concerning the employee's timesheet, regular and additional incomes and regular and additional deductions. Detailed information on these may be accessed by clicking on their respective tabs to the right of the sub-view.

For the views under each tab click on *Update View / Update List* or right click within the sub-view and select *Update View / Update List* to view updated information.

**See also:**

[Employee Manager Diagram](#)

[Time Sheet](#)

[Income](#)

[Additional Incomes](#)

[Deductions](#)

[Additional Deductions](#)

##### 4.3.2.6.1 Time Sheet

**See:**

[Time Sheet](#)

## 4.3.2.6.2 Income

**See:**[Income](#)

## 4.3.2.6.3 Additional Incomes

Under *Additional Incomes* you are able to add additional income to the employee's pay, edit an additional income for that employee and delete an existing additional income for the employee. The additional income indicated is the non-standard income previously specified and described in the [Income](#) section.

To add an additional income click on *Add* at the top of the sub-view or right click within the view and select *Add*. This opens the *Additional Income* window where you must enter the required income information. You must specify if this income is recurring (to be appended to employee's pay in each payroll generation) or periodic (occurring only for a limited period). Select the *Active* property if this income is to be applied in the next payroll generation for that employee. Click *Save* to add the new income to the employee's pay or *Cancel* to leave that employee's income unchanged.

To edit an existing additional income select that income and click on *Edit* at the top of the sub-view or right click with the sub-view and select *Edit*. This will open the *Edit Additional Income* window. Click *Save* to save changes made to the additional income or *Cancel* to leave the income unchanged.

## 4.3.2.6.4 Deductions

**See:**[Deductions](#)

## 4.3.2.6.5 Additional Deductions

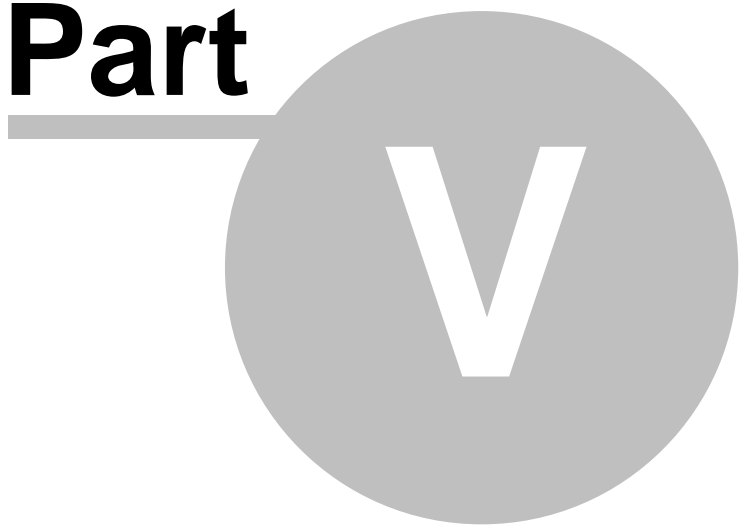
Under *Additional Deductions* you are able to add an additional deductions to be taken from the employee's pay, edit a deduction and delete a deduction.

To add an additional deduction click on *Add* at the top of the sub-view or right click within the view and select *Add*. This opens the *Additional Deduction* window where you must enter the required deduction information. You must specify if this deduction is recurring (to be appended to employee's pay in each payroll generation) or periodic (occurring only for a limited period). Select the *Active* property if this deduction is to be applied in the next payroll generation for that employee. Click *Save* to add the new deduction to the employee's pay or *Cancel* to leave that employee's deductions unchanged.

To edit an existing additional deduction select that deduction and click on *Edit* at the top of the sub-view or right click with the sub-view and select *Edit*. This will open the *Additional Deduction* window. Click *Save* to save changes made to the additional deduction or *Cancel* to leave the deduction unchanged.

**See also:**[Additional Incomes Diagram](#)[Employee Manager Diagram](#)

**Part**



## 5 Timekeeping

### 5.1 Time-Keeping

The time-keeping functionality of **P.A.Y.H.R.** allows you to more efficiently keep track of the number of hours each hourly paid employee works each day and allows you to edit a daily timecard for each. This timecard includes the employees' times of work-day starts, work-day ends, break starts and end and calculates the total number of hours worked for that day based on the collected times.

The daily timecard is present in two forms:

- A timecard with only the work day start, work day end, lunch start and lunch end.
- A timecard which possesses, in addition to times mentioned in the previous timesheet, start and end times for two breaks: one between the work-day start and the lunch start, and the other occurring between the lunch end and the work-day end.

The user has the option of which form of the timecard will be used.

The Timekeeping section may be viewed from a [daily view](#) which shows all timecards for all hourly paid employees for a chosen day, or from a [detailed view](#) which shows all timecards related to each hourly paid employee.

Timekeeping offers further analysis of the work times spent by hourly paid employees by including a job-costing / time allocation section, whereby the total work hours spend by an employee may be dissected according to the time spend on specific tasks.

You may access the Timekeeping component of **PAYHR** by clicking on the *Time Keeping* link appearing under *HR* in the menu to the left or alternately selecting *H.R. - Time Keeping* from the menu at the top of the window.

#### 5.1.1 Daily View

To access the daily view of hourly paid employees [open the timekeeping manager](#) and select the tab "Daily View".

Selecting the *Use Breaks* checkbox displays a timesheet which, in addition to the work-day and lunch times, includes two breaks, one occurring between the work day start and the lunch start, the other occurring between lunch end and work day end. Deselecting this checkbox will display a timesheet which contains only work-day and lunch-times, and excludes the previously mentioned breaks.

Choosing a specific date will display timecards for all hourly-paid employees only for the indicated day.

To edit a time for a specific employee click on the time cell to make that time editable and use arrows to manipulate the time within the fields.

Click on the *Save* button at the top to save edited information.

Save Edited Times

Choose Timesheet Date

Indicate Timesheet Type (with or without breaks)

Daily View Detail Views

Save Choose A Date 8/31/2005 Refresh Use Breaks

\*When entering the time please do so in the format - 00:00 AA - Where AA is replaced with either AM or PM  
 \*PLEASE NOTE: All times for an employees time card will default to 12:00 AM.

Employee Name	Work Start	1st Break End	Lunch Start	Lunch End	2nd Break Start	2nd Break End	Work End	Hours Worked
John Smith	12:00 AM	12:00 AM	12:00 AM	12:00 AM	12:00 AM	12:00 AM	12:00 AM	0Hrs 0Mins
Renee Baltimore	12:00 AM	12:00 AM	12:00 AM	12:00 AM	12:00 AM	12:00 AM	12:00 AM	0Hrs 0Mins
Nathaneel Edwards	12:00 AM	12:00 AM	12:00 AM	12:00 AM	12:00 AM	12:00 AM	12:00 AM	0Hrs 0Mins

Total Hours Worked: 0Hrs 0Mins

[Daily Timesheet View - \(Showing timecards types with and without breaks\)](#)

## 5.1.2 Detailed View

To access the detailed view of hourly paid employees [open the timekeeping manager](#) and select the tab "Detailed View".

Click on the [Find Employees](#) button at the top to search for hourly paid employees according to specified search criteria.

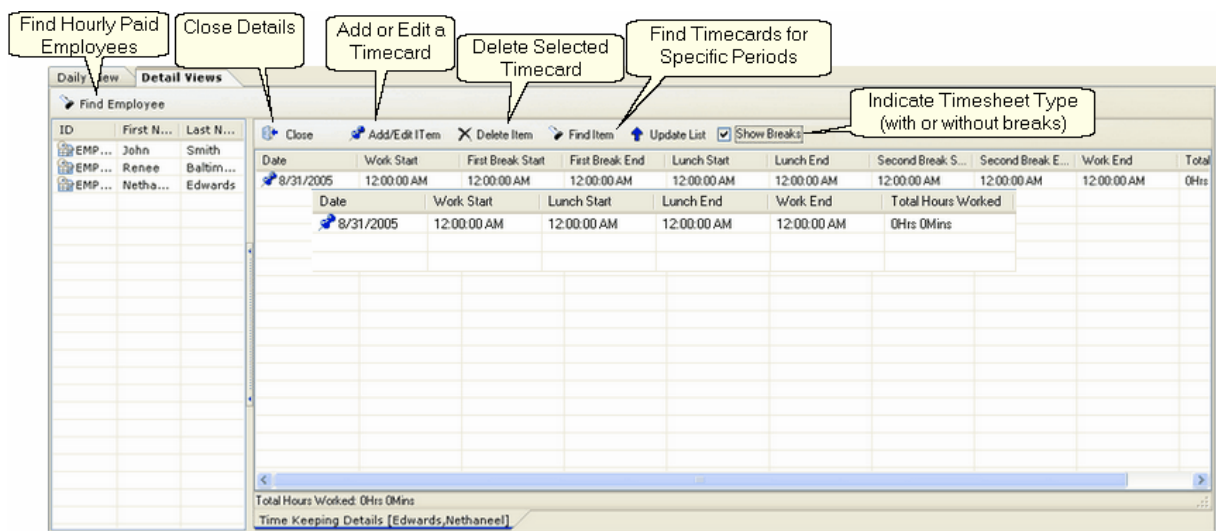
The rightmost section of the detailed view shows a list of the search results. Clicking on an employee will open, in the left, a view of all the timecards related to that employee.

Selecting the *Show Breaks* checkbox displays a timesheet which, in addition to the work-day and lunch times, includes two breaks, one occurring between the work day start and the lunch start, the other occurring between lunch end and work day end. Deselecting this checkbox will display a timesheet which contains only work-day and lunch-times, and excludes the previously mentioned breaks.

Click on *Add/Edit Item* to add a new timecard for the selecting employee or to edit an existing timecard for that employee. This opens the Edit Time Keeping Info window where you must select the date of the timecard, the field for which you be entering the time, and set the time. To set the clock component of this window, left-click to change the hours and right-click to change the minutes. Click *Ok* to save the edited time or *Cancel* to cancel the change.

Select a timecard and click on *Delete* to delete this timecard.

Click on *Find Item* to search for that employee's timecards for a specific period.



[Detailed Timesheet View - \(Showing timecard types with and without breaks\)](#)

**Part**

---

**VI**

## 6 Payroll Management

## 6.1 Payroll Creation Architecture

A payroll is the calculated net income to be paid to employees after deductions have been taken. The payroll function allows you to construct employee payrolls based on data extracted from the previously collected HR information, more specifically, salary, work profile and time and leave management information.

When calculating a payroll the type of payroll has to be specified. For example a weekly payroll is considered different from a biweekly payroll. **P.A.Y.H.R.** will automatically gather all employees paid according to the specified payment type, as well as other relevant pieces of information and create, for that period, an employee timesheet having time-related fields:

- Regular - Regular hours worked by the employee
- Overtime1 - Overtime hours worked by the employee at first rate
- Overtime2 - Overtime hours worked by the employee at second rate
- Overtime3 - Overtime hours worked by the employee at third rate
- Overtime4 - Overtime hours worked by the employee at fourth rate
- No. Cert - Number of certified sick days the employee took during the payroll period
- No. Uncert - Number of uncertified sick days the employee took during the payroll period
- No. Vacation - Number of vacation days the employee took during the payroll period
- No. Maternity - Number of maternity days the employee took during the payroll period
- No. Other - number of other days that the employee took during the payroll period

These are days for which the employee is paid. The timesheet will take the form of that in the following *Timesheet Diagram*:

[illegible]

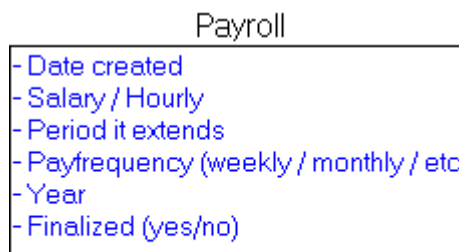
### Timesheet Diagram

### Addendum:

- The number of days on the timesheet cannot be edited. Only regular hours and overtime hours may be adjusted.

The timesheet will provide information for the production of a time card. The time card will contain calculations of incomes based on the times in the time sheet. The timesheet and time card as well as information regarding categories of income recieved (regular/overtime/travelling/etc) and the deductions(Medical Benefits/Social Security/Education Levy/etc), if any, from these incomes will contribute to the payroll creation. The net income of all active employees (employees working for that period) payed according to that payment type is then calculated. For an hourly paid individual numbers of days are converted to hours before calculations are done. This payroll is then stored in the database for future reference. A payroll has the following structure:



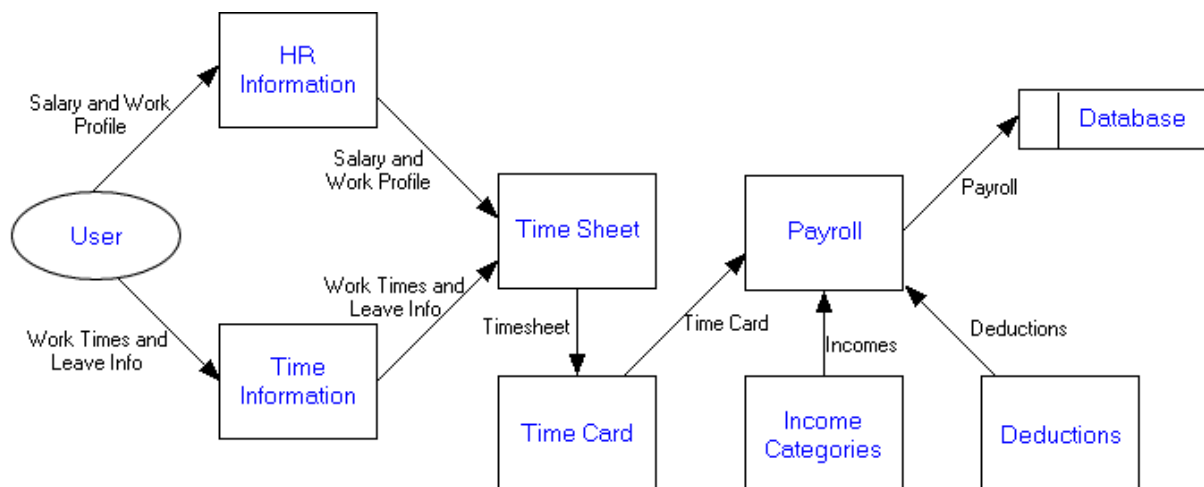


[Payroll Structure Diagram](#)

**Addendum:**

- PayHR does not allow two payrolls of similar type and for the same period to exist in the system at the same time.

The dataflow for payroll creation is demonstrated in the following *Payroll Creation Diagram*.



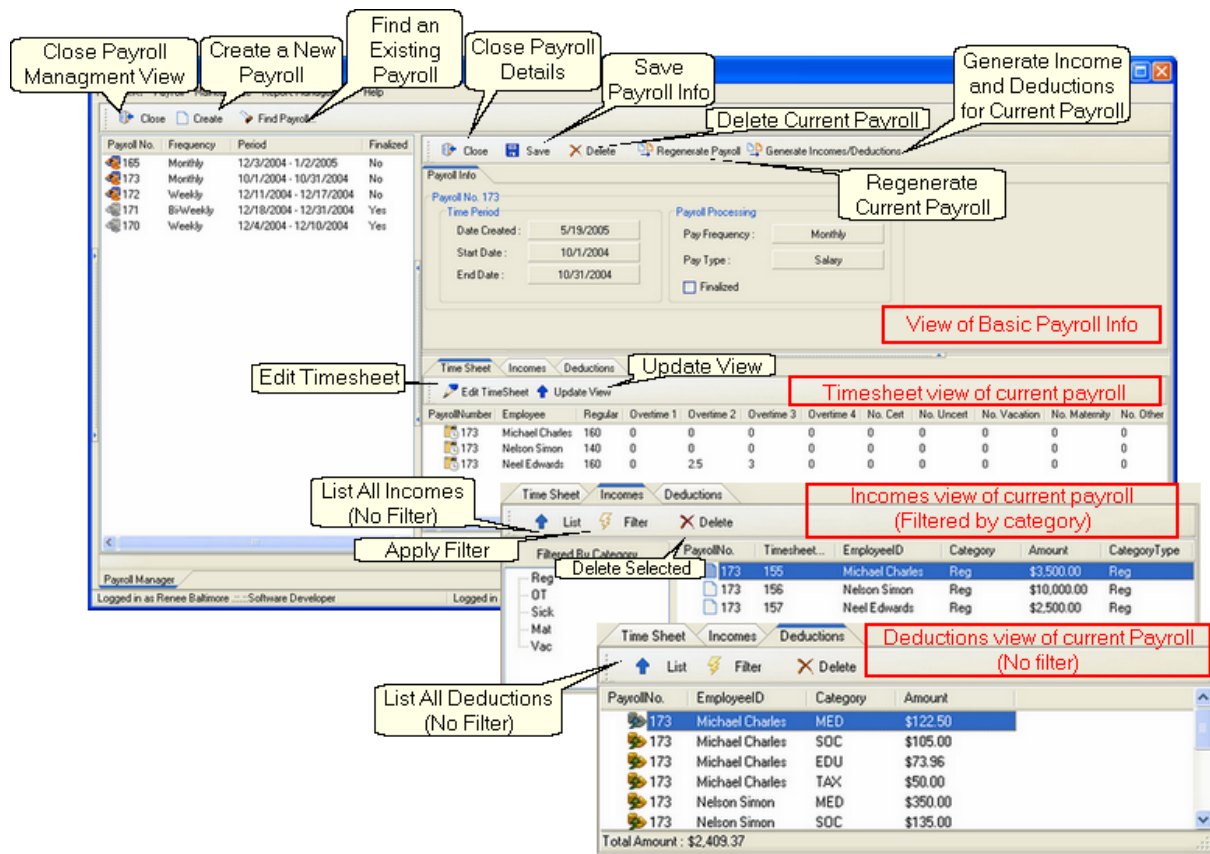
[Payroll Creation Diagram](#)

## 6.2 Payroll Management Overview

Click on *Payroll Management* under *Payroll* in the menu to the left or select *Payroll - Payroll Management* from the main menu above. This will open the *Payroll Manager* in the right. The payroll manager is displayed in two views: the left view which lists the payrolls and the right view which displays detailed payroll information.

From the Payroll Manager you are able to:

- [Create a New Payroll](#)
- [Delete an Existing Payroll](#)
- [Find a Payroll](#)
- [Sort Payrolls](#)
- [View and Edit Payroll Information](#)



Payroll Management View

## 6.3 Create a New Payroll

To create a new payroll [open the payroll manager](#) and click on the *Create* tab above the *Payroll Manager* or right click within the left view and select *Create Payroll*. This will open the *Payroll Generator* window. Enter the relevant information.

### Addendum:

- The start date field of the *Payroll Generator* cannot contain a date occurring subsequent to the present date.

Select the *Finalized* property if the payroll is finalized and cannot be altered after generation. Click *Generate* to create the payroll. Clicking *Generate* automatically saves the new payroll to the **P.A.Y.H.R.** database. Initially the time-related entries on the timesheet of this payroll are all set to 0. You must [edit the timesheet](#) accordingly then click on *Generate Incomes and Deductions* at the top of the manager to generate all incomes and deductions for that payroll. Only regular hours and overtime hours, however, may be edited from the time sheet. All other fields requiring a number of days must be edited from the [leave view](#) for that employee.

## 6.4 View and Edit Payroll Information

To view a payroll [open the payroll manager](#) and [find the payroll](#) you would like to view. Double-click on the desired payroll to open its detailed information in the payroll manager.

For a newly created payroll you must [edit the timesheet](#) accordingly and click on *Generate Incomes/Deductions* at the top of the payroll manager. This calculates all the incomes due and deductions taken from each employee on the timesheet for the specified period. Incomes and deductions must be generated after any modifications that have been made to the timesheet to ensure that updated and accurate information is being viewed.

The *Regenerate Payroll* button at the top of the payroll manager recreates the payroll, overwriting all modifications and resetting the payroll to its initial state.

The first sub-view shows payroll info. The second sub-view displays the timesheet, incomes and deductions for that payroll. To display these, click on their respective tabs.

**See Also:**

[Payroll Info](#)  
[Time Sheet](#)  
[Incomes](#)  
[Deductions](#)

### 6.4.1 Payroll Info

Basic payroll information is viewable in the first sub-view in the right of the payroll manager. All fields appearing under *Payroll Info* are uneditable except the *Finalized* property of an unfinalized payroll. Select *Finalized* to finalize the payroll.

**Addendum:**

- A finalized payroll may not be edited.

**See also:**

[Payroll Management Diagram](#)

### 6.4.2 Time Sheet

The time sheet displays the various times which employees have worked or may be paid an income. To edit the timesheet select an employee and click on *Edit Timesheet*. This opens an *Edit Timesheet* window where times for the selected employee may be edited. Only regular and overtime hours may be edited from the *Edit Timesheet* window. Click *Save* to save changes made to the timesheet or *Cancel* to leave the time sheet unchanged.

**Addendum:**

- Only regular hours and overtime hours may be adjusted. The fields on the timesheet requiring a number days cannot be edited. These fields can only be changed from the [leave view](#) for that employee.

- The timesheet for a finalized payroll cannot be edited.

**See also:**

[Payroll Management Diagram](#)

### 6.4.3 Income

Under *Incomes* you are able to see the incomes associated with a payroll.

Click on *List* or right click within the view and select *List* to view a list of the income accumulated by employees on that payroll.

The *Filter By* property allows you to refine your view of incomes payable. Incomes may be filtered by payroll number, employee ID, category or category type. Click on *Filter By* and select the desired property from the drop down menu. If this property occurs in more than one general instance (eg. if there are entries for 5 employees on the payroll and Filter By Employee ID is selected) all general instances of this property are listed to the left side of the second subview. Click on any of these general instances to filter incomes accordingly.

You can delete any income entry by selecting that entry and clicking on *Delete* at the top of that sub-view, or right-clicking on the entry and selecting *Delete*.

**Addendum:**

- Only an income from an unfinalized payroll can be deleted. The delete button is disabled for incomes on a finalized payroll.

The bottom of the sub-view displays the net sum of all incomes.

**See also:**

[Payroll Management Diagram](#)

### 6.4.4 Deductions

Under *Deductions* you are able to see the deductions associated with a payroll.

Click on *List* or right click within the view and select *List* to view a list of all deductions subtracted from the employees on that payroll.

The *Filter By* property allows you to refine your view of deductions. Deductions may be filtered by employee ID or by category. Click on *Filter By* and select the desired property from the drop down menu. If this property occurs in more than one general instance (if there are 5 entries for 5 employees on the payroll and Filter By Employee ID is selected) all general instance of this property are listed to the left side of the second subview. Click on any of these general instances to filter the income accordingly.

You can delete any deduction entry by selecting that entry and clicking on *Delete* at the top of that sub-view, or right-clicking on the entry and selecting *Delete*.

**Addendum:**

- Only deductions from an unfinalized payroll can be deleted. The delete button is disabled for finalized deductions.

The bottom of the sub-view displays the summed total of all the employee's deductions.

**See also:**

[Payroll Management Diagram](#)

**Part**

**VII**

## 7 Income and Deductions

### 7.1 Processing Income and Deductions

Income, with respect to payroll calculations, is defined as the monies accumulated by an employee. Each income category is subject to government taxes and deductions. In Antigua and Barbuda these exist as:

- Medical Benefits deductions
- Social Security deductions
- Education Levy deductions
- Income tax

Each company has categories of potential income payable to employees. These include system income categories (income categories which always exist in the system and cannot be taken out) and user income categories (income categories specific to particular employees). These income categories are stored in the system in association with all the deductions which should be taken from them. System incomes include:

- Regular income
- Overtime income
- Certified sick pay
- Uncertified sick pay
- Vacation pay
- Maternity pay

User income categories refer to traveling income, housing allowances, etc. These are dependent on company codes of payment.

A [timesheet](#) is constructed based on the payable system incomes. From the timesheet the system income payable to each employee is calculated in the income table. This income table will also include all other income due employees.

#### Application of Deductions to Income:

For each possible deduction the system combs the list of potential incomes to determine all the income types to which this deduction is applicable. It then goes through the table of incomes and makes the corresponding deduction from each item of this income type and creates a corresponding deductions table.

The table of incomes will take the form:

Payroll No.	Timesheet No.	Employee ID	Category	Amount	Category Type
90	84	JohnDoe	Reg	\$2000.00	Reg
90	84	JohnDoe	OT	\$100.00	OT1
90	84	JaneDoe	OT	\$60.00	OT2
90	-	JaneDoe	Travel	\$50.00	Travel

**Addendum:**

- Traveling allowance is not attached to a time sheet since it is not a system income.

The table of deductions will take the form:

Payroll No.	Employee ID	Category	Amount
90	JohnDoe	MED	\$73.50
90	JohnDoe	SOC	\$63.00
90	JaneDoe	EDU	\$32.80
90	JaneDoe	TAX	\$60.00



**Part**



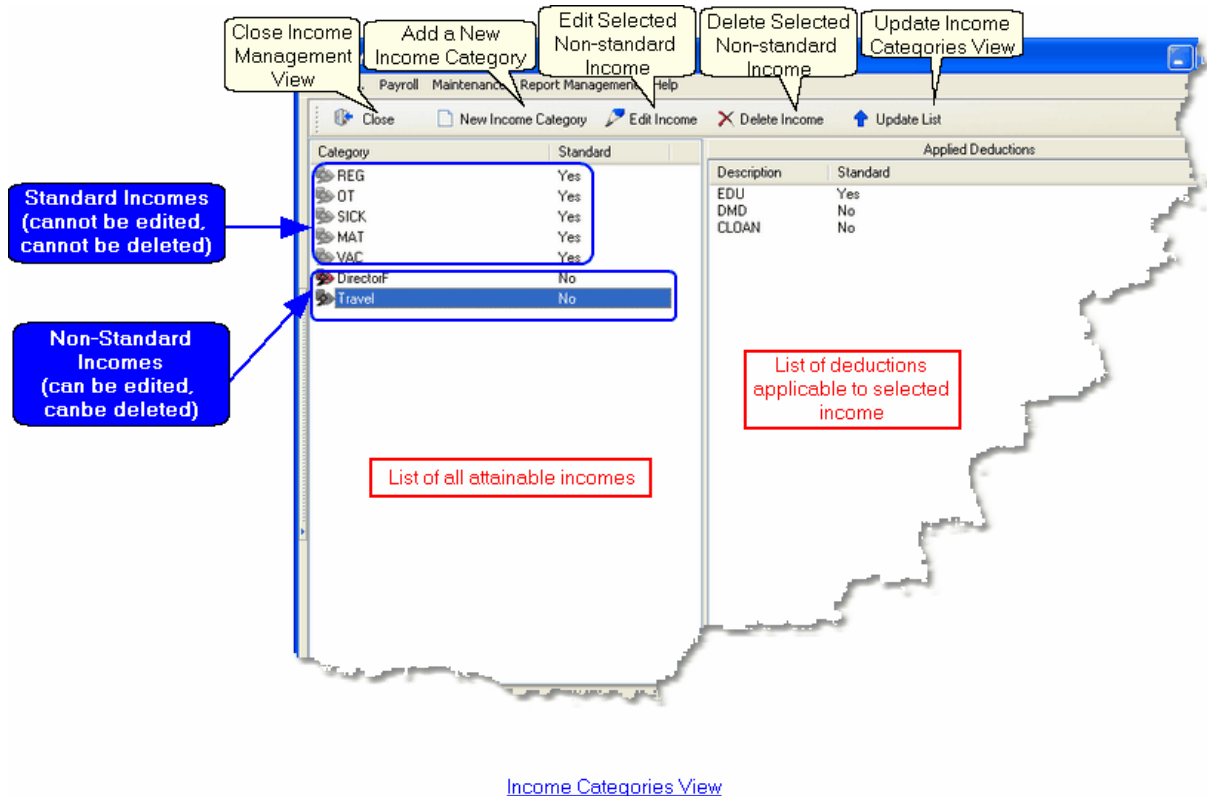
## 8 Income Management

### 8.1 Incomes Overview

As a result of this software's design being specific to the rules of organizations within Antigua and Barbuda, the system includes fixed, standard income categories which cannot be removed from the system, nor can they be edited. **P.A.Y.H.R.**, however, also allows you to specify your own additional income types payable to employees. The standard income types in the **P.A.Y.H.R.** system include Regular pay, Overtime pay, Sick pay, Maternity pay and Vacation pay.

The various income categories may be managed from the *Income Manager*. Here you are able to specify what income may be received by employees as well as the respective deductions which can be taken from each income category. Click on the *Income Categories* link from the menu to the left or select *Payroll - Income Categories* from the main menu above. This will open the *Income Manager* in the right section of the window. The income manager is displayed in two views: the left view which lists income and the right view which displays detailed income information. From the income manager you are able to:

- [Create a New Income Category](#)
- [Delete an Existing Income Category](#)
- [Sort Income](#)
- [View and Edit Income Information](#)



## 8.2 Create a New Income Category

To create a new income category [open the income manager](#) and click on *New Income Category* above the income manager or right click within the right view of the income manager and select *Create*. This will open the *New Income Category* window where you must enter the requested income information and select all deductions which are to be taken from this income. Click *Save* to save the new income category to the **P.A.Y.H.R.** database or click on *Cancel* to cancel the new income category.

**See also:**

[Income Categories Diagram](#)

## 8.3 View and Edit Income Information

To view and edit income information [open the income manager](#). A list of all income categories in the system is displayed in the left view. Click on any of these income categories to view all deductions taken from this income in *Applied Deductions* in right view of the income manager. To edit an income select that income category and click on *Edit Income*. This opens the *Edit Income Category* window where you may make changes to the income information and applied deductions. Click *Save* to save changes or *Cancel* to leave the income category unchanged.

Click on *Update List* to view updated information. The income manager should however do this automatically.

**See also:**

[Income Categories Diagram](#)

**Part**

---

**IX**

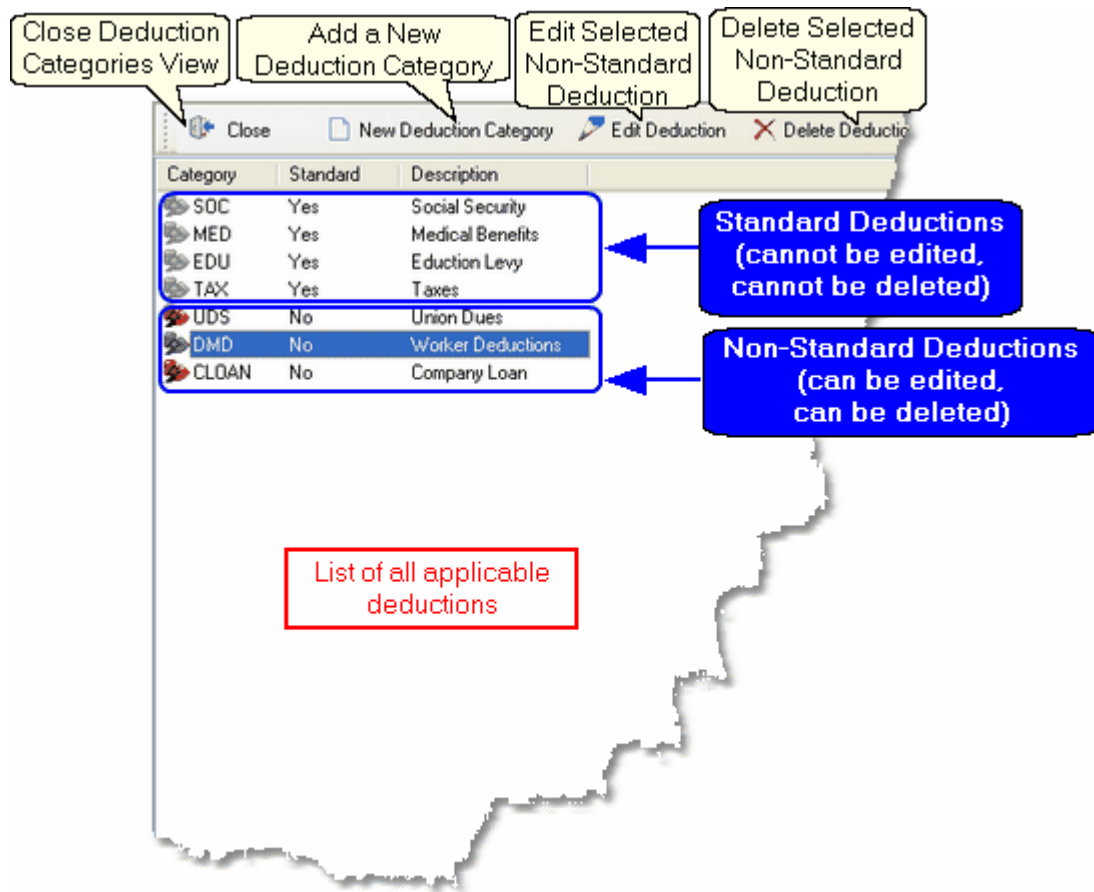
## 9 Deduction Management

### 9.1 Deductions Overview

As a result of this software's design being specific to the rules of organizations within Antigua and Barbuda, the system includes fixed, standard deductions which cannot be removed from the categories of deductions taken, nor can they be edited. **P.A.Y.H.R.**, however, also allows you to specify your own additional amount types deductible from employees' pay. The standard deductions in the **P.A.Y.H.R.** system include: Social Security, Medical Benefits, Education Levy and Income Tax these may be identified as standard deductions by a Yes the *Standard* field in some views where these deductions are displayed.

Deductions can be managed from the *Deductions Manager*. To access the deductions manager click on the *Deductions Categories* link from the menu to the left or select *Payroll - Deductions Categories* from the main menu above. From the deductions manager you are able to:

- [Create a New Deduction](#)
- [Delete an Existing Deduction](#)
- [Find Deduction](#)
- [Sort Deductions](#)
- [View and Edit Deductions Information](#)



[Deduction Categories View](#)

## 9.2 Create a New Deduction

To create a new Deduction [open the deductions manager](#) and click on *Create* above the Deductions Manager. This will open the *New Deduction Category* window where you must enter the deduction information requested. Click *Save* to save the new deduction category to the **P.A.Y.H.R.** database or click on *Cancel* to cancel the new deduction category. All new deductions created will be saved as non-standard deductions (i.e. these deductions will contain a *No* in the *Standard* field in some views where they are displayed).

**See also:**

[Deduction Categories Diagram](#)

## 9.3 View and Edit Deductions Information

To view and edit deduction information [open the deduction manager](#). This displays a list of all deductions in the **P.A.Y.H.R.** system. All non-standard deductions may be edited by the user, provided the user possesses that authority. Select the non-standard deduction you want to edit and click on the *Edit Deduction* button above. This opens the Edit Deduction Category window where you may make the desired changes to the deduction information.

**Addenda:**

- Medical Benefits, Social Security, Education Levy and Taxes are standard deductions and may not be edited or deleted.
- The *Edit Deduction* and *Delete Deduction* buttons are disabled for the standard deductions listed above.

**See also:**

[Deduction Categories Diagram](#)

**Part**

---



**X**



## 10 Company Management

### 10.1 Company Overview

**P.A.Y.H.R.** may be configured for a single company at any one time. Company information may be accessed by clicking on the *Company* link appearing under *Maintenance* in the menu to the left or by selecting *Maintenance - Company* from the main menu above. Clicking on the *Company* link will open the *Company Manager* in the right section of the window. The *Company Manager* is displayed in two views: the left view which displays the company and the right view which displays detailed company related information. From the company manager you are able to:

- [Add a New Company](#)

**Addendum:**

- The add a new company function is only available if there are no companies presently in the **P.A.Y.H.R.** database.
- [Delete a Company](#)
- [View and Edit Company Information](#)
- [Create and Edit Work Profile Templates](#)

Close Company Management View

Add a New Company (only enabled if there is no company in the system)

Update Company View

Basic company details

Work Profile template design

Reset All Fields to Initial Values

Delete current template

Save New or Edited Template

Company Management View

## 10.2 Add a New Company

This functionality allows you to add a company to the **P.A.Y.H.R.** database. To add a new company, [open the company manager](#) and click on the *New* button above. You may, alternately, right click within the left view of the Company Manager and select *New Company*.

Selecting the *New* function opens the Add Company wizard where you are required to enter the requested company information.

### Addendum:

- All fields with \* indicate mandatory information. The wizard will not save the company unless these fields are filled out with valid information.

You may choose to cancel the addition of a new company by clicking on *Cancel*.

Click *Finish* to add the information to the **P.A.Y.H.R.** database and exit the *Add New Company* wizard. A message will appear on the screen to indicate if the company has been added successfully or if an error has occurred.

## 10.3 View and Edit Company Information

To view and edit company information open the company manager and double click on the company in the left view. This opens, in the right view, all company information.

The first view contains detailed company info and company settings. This information is editable. Click on *Save* at the top of the company manager to save any modifications made within this view.

The second subview of the company manager holds the [Work Profile Template](#) view.

## 10.4 Work Profile Templates

Company management allows you to create and reuse work profile templates for a company. A work profile template contains predefined values of expected working times, allowed leave days and rates, overtime rates etc. for a particular category of employees. To create a work profile template [open the company manager](#) and in the template settings section of the right view enter the work profile information for the template.

### **Addenda:**

- Ensure that the *Edit Existing* field is left blank when creating a new template.
- Ensure that all mandatory fields (fields marked with \*) are filled in with valid information.

Click the *Save Template* button to save the new template. This template will be saved by the name indicated in the *Save as New* field.

To edit an existing template select a template from the *Edit Existing* field and make the desired changes.

### **Addenda:**

- Ensure that the *Save as New* field is left blank when editing an existing template.
- Ensure that all mandatory fields (fields marked with \*) are filled in with valid information.

Click the *Save Template* button to save the changes made to the template.

Clicking the *Reset* button will reset all fields to their default values.

Clicking the *Delete* button will delete the existing work profile template which is currently being displayed.

**Part**

---

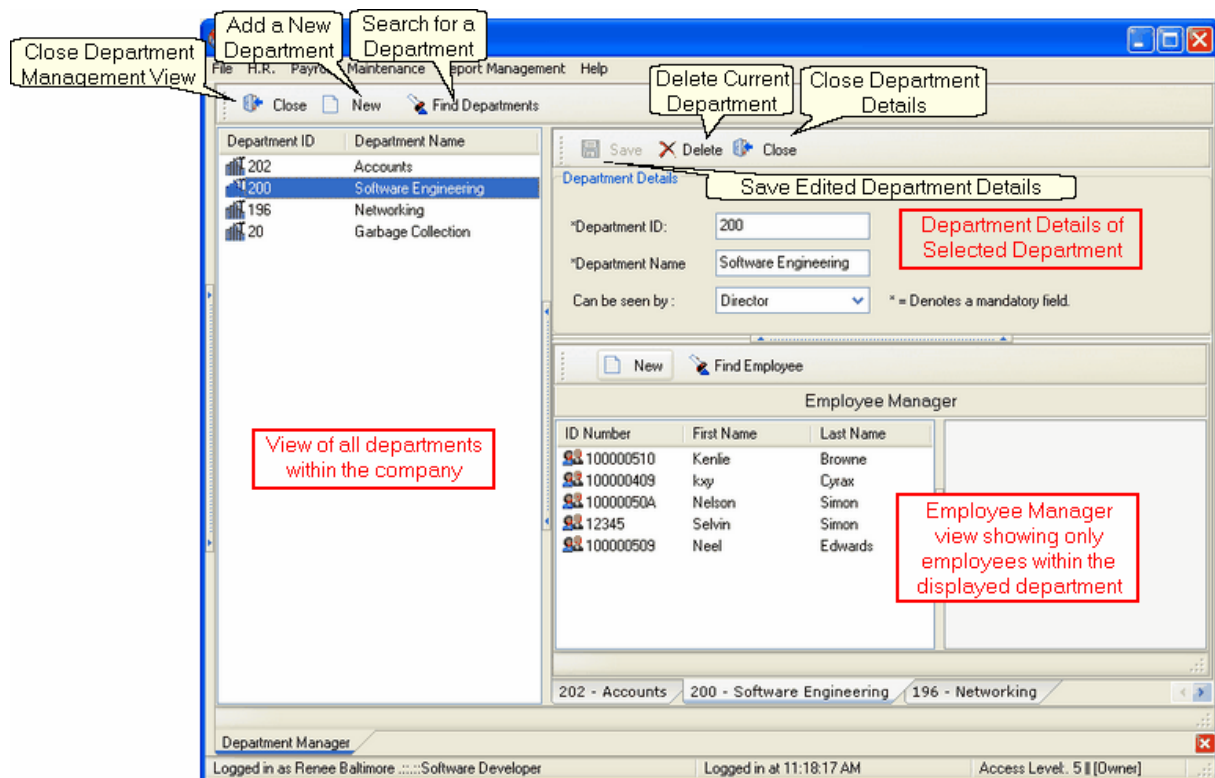
**XI**

# 11 Department Management

## 11.1 Department Overview

The system maintains basic information of departments and the employees in these departments. New departmental information may be added or existing departmental information may be edited. Departmental information may be accessed by clicking on the *Departments* link appearing under *Maintenance* in the menu to the left or by selecting *Maintenance - Departments* from the main menu above. Clicking on the *Departments* link will open the *Department Manager* in the right section of the window. The department manager is displayed in two sub-views: the left sub-view which lists the departments and the right sub-view which displays detailed departmental information. From the department manager you are able to:

- [Add a New Department](#)
- [Delete an Existing Department](#)
- [Find a Department](#)
- [Sort Departments](#)
- [View and Edit Departmental Information](#)



[Department Management View](#)

## 11.2 Add a New Department

This functionality allows you to add a new department to the **P.A.Y.H.R.** database. To add a new department [open the department manager](#) and click on the *New* button above. You may alternately right click within the left hand sub-view of the department manager and select *New Department*.

Selecting the *Add New Department* function opens the *Add New Department* window where you are required to enter the requested department information.

### **Addendum:**

- All fields with \* indicate mandatory information. The wizard will not proceed to the next phase unless these fields are filled out with valid information.

You may choose to cancel the addition of a new department by clicking on *Cancel*.

Click *Finish* to add the information to the **P.A.Y.H.R.** database and exit the Add New Department window. A message will appear on the screen to indicate if the department has been added successfully or if an error has occurred.

### **See also:**

[Department Management Diagram](#)

## 11.3 View and Edit Departmental Information

The information associated with a particular department may be viewed by double-clicking on that department in the left view of the Department Manager. This information will be displayed two sub-views in the right hand view of the Department Manager. Detailed departmental information will be displayed and may be changed from this view.

Click *Save* to save any changes made in the first sub-view.

The second sub-view displays the *Employee Manager* containing only the employees in the specified department. Click *Close* to close the employee Manager and *New* to add a new employee to this department. Clicking *New* will open the [Add New Employee](#) four step wizard.

Double clicking on an employee in the left view of the Employee Manager will display that employee's detailed information in the right view of the Employee Manager. This information may be edited.

### **See also:**

[Department Management Diagram](#)

[Employee Manager Diagram](#)

[View and Edit Employee Information](#)

**Part**

---

**XII**

## 12 Report Management

### 12.1 Reporting Structure

**P.A.Y.H.R.** offers you reporting capabilities whereby by you are able to view structured information based on the company's data contained in the **P.A.Y.H.R.** database. **P.A.Y.H.R.** maintains a vast collection of reporting styles with varying data fields appended. New report designs may not be added nor can existing report designs be changed or deleted. You are able to select your desired report type and the report will be generated accordingly with the information gathered from the database.

All reports are contained within defined categories in the database. Each report further possesses a name, description and access level. New categories may be added to the default categories in the system, and reports may be relocated from any category to another. Categories may also be deleted. However, there exists a universal category defined as *Unassigned* which contains all reports which do not belong to any of the other defined categories. When a category is deleted all reports from this deleted category are automatically transferred to the *Unassigned* category since no reports may be removed from the system.

Report properties may also be edited. The editable properties of reports include: name, description, category and access level.

### 12.2 Reporting Manager

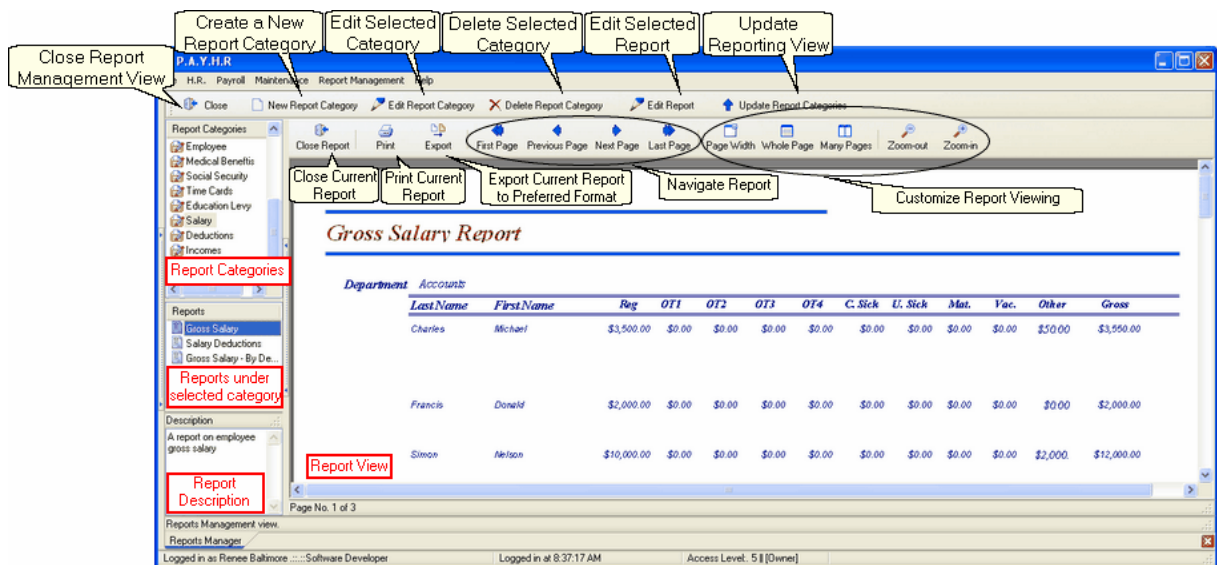
**P.A.Y.H.R.** allows you to generate structured reports based on the information in the database. Click on the *Reports* link under *Report Management* in the menu to the left or selecting *Report Management - Reports* on the main menu above. This opens the *Reporting Manager*. The reporting manager is divided into a left view and a right view, with the the left view being further sub-divided in to a *Report Categories* subview, *Reports* sub-view and a *Description* view. The *Report Categories* sub-view lists all categories of reports as well as the general *All Reports* category from which a list of all reports within the system can be displayed. The *Reports* sub-view lists all reports found under a selected category. The *Description* sub-view provides a short description of the selected report. The right view of the reporting displays the detailed report.

From the reporting manager you are able to:

- Add a report category by clicking on the *New Report Category* button above or right clicking within the *Report Categories* sub-view and select *New Report Category*. This opens the Add Report Category window where you must fill in the requested report information.
- Edit a report category by selecting a category from the *Report Categories* sub-view and clicking on *Edit Report Category* above or right clicking on a report category and selecting *Edit Report Category*. This opens the *Report Information* window where you are able to make modifications to the report category.
- Delete a report category by selecting a category from the *Report Categories* sub-view and clicking on *Delete Report Category* above or right clicking on the report and selecting *Delete Report Category*.
- Edit a report by selecting a report from the *Reports* sub-view and clicking on *Edit Report* above or right clicking on the report and selecting *Edit Report*. This opens the *Report Info* window where you are able to make modifications to the report properties.
- Relocate reports among the available reporting categories by selecting the report and editing its properties as indicated in the previous point or by clicking and dragging a report from the *Reports* sub-view onto a report category in the *Report Categories* sub-view.



- Update reporting view by clicking on *Update Report Categories* above or right clicking within the *Report Categories* sub-view and selecting *Update Report Categories*.
- Save a generated report by exporting the report displayed in the reporting manager to one of the formats offered. **P.A.Y.H.R.** will convert the displayed report to the selected format. To achieve this click on the *Export* button at the top of the reporting manager and select one of the formats shown, in which you would like to save your report. This opens an *Export To \*\*\** window where you can specify your export settings. After confirming your settings a *Save As* dialog box opens allowing you to specify the location to which you want to save your report. **P.A.Y.H.R.** converts the report to the selected format.



[Report Management View](#)

**See also:**  
[Reporting Structure](#)

**Part**

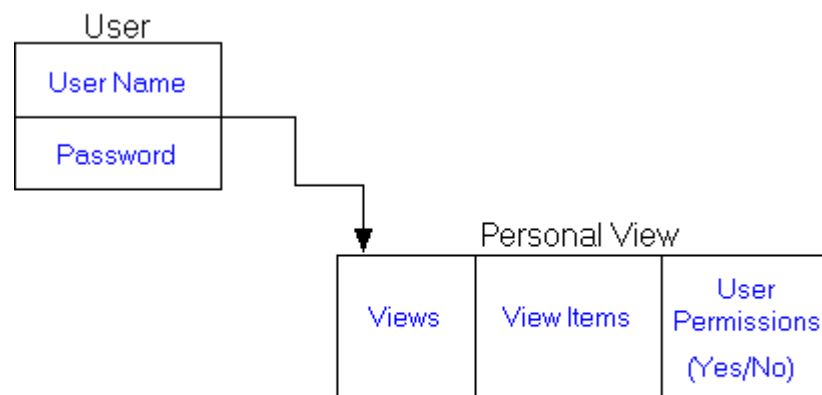


## 13 Security

### 13.1 Security System Overview and Architecture

The **P.A.Y.H.R.** application employs a security system whereby certain restrictions are given and permissions allowed to users or groups of users. This security system serves to enhance the system's accessibility factor. To access the settings of the security system click on the *User Security* link located under *Maintenance* in the menu to the left or select *Maintenance - User Security* from the main menu above. This will open the *User Manager* in the right section of the window.

**P.A.Y.H.R.** maintains a list of all users who may access the system. These users are given a login name and password which must be provided in order that the application be opened. Associated with this list of users are all views and actions which each user is permitted to see and perform respectively. This is demonstrated in the *User Permissions Diagram* below.



[User Permissions Diagram](#)

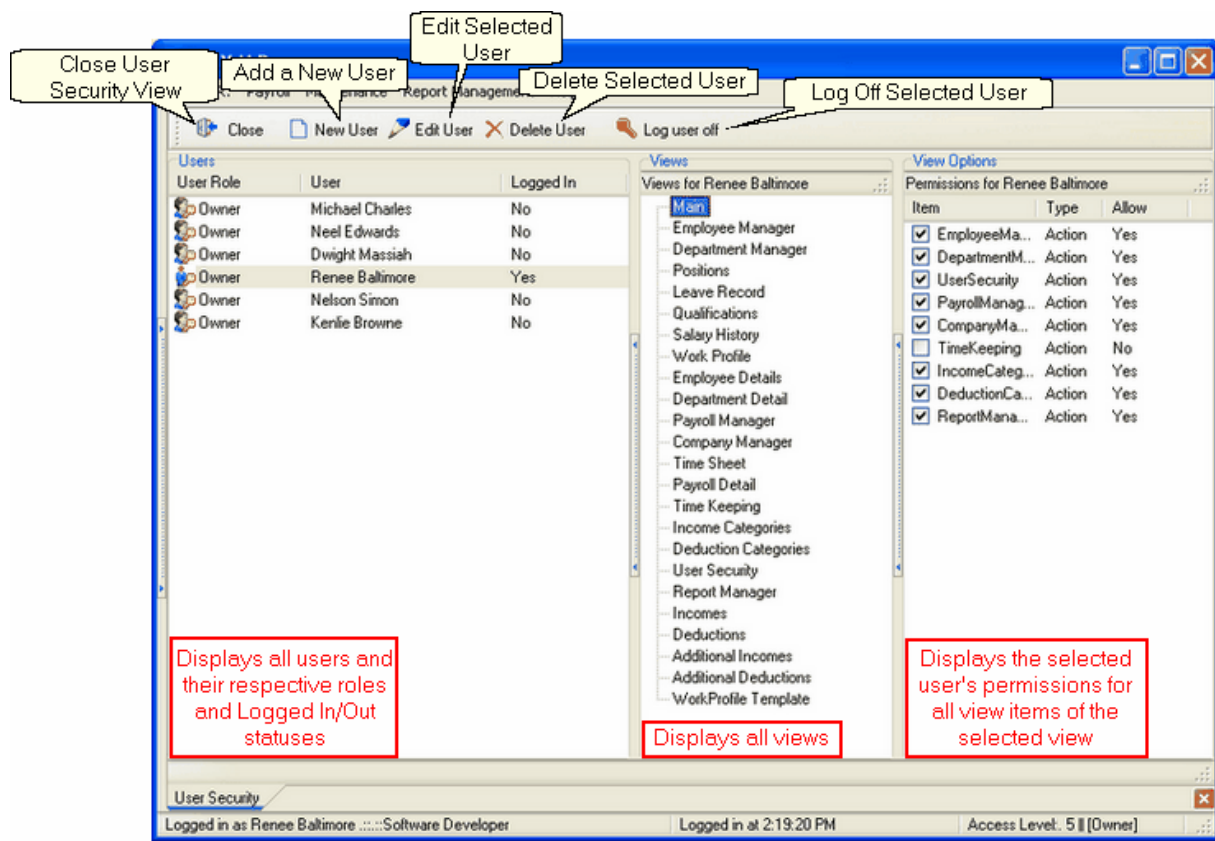
When a user logs in to the system, that user's permissions are sent from the server to the client. This enables the user to see those view items with permission 'Yes' and disables or hides those with permission 'No'.

User permissions may be altered only by users with administration privileges. Administration is given all access rights to the system.

The *Users* view of the *User Manager* displays all the users on the system, their user roles and their statuses, that is, whether they are logged on or not (right click within the *Users* view of the user manager and select *Refresh List* to see an updated view of users' statuses). The *Views* view shows all the views on the system and the *View Options* view shows all the view items associated with particular views and the user's permissions concerning these items

From the User Manager you are able to:

- [Add a New User](#)
- [Set User Permissions](#)
- [Log Off a User](#)
- [Edit User](#)
- [Delete a User](#)



[User Security View](#)

## 13.2 Data Security

The security system design entails the use of role levels and access levels. Both types of levels are defined from 1-5, with level 1 having the lowest role/accessability and level 5 the highest role/accessability. Roles are assigned to all users upon their entry into the system, while access levels are assigned to all information present in the system, including top level entities such as companies, departments, employees, reports, deductions, income and user information. When a level is assigned to these entities the user assigning these levels must indicate the lowest user role which is able to access this data. It will be assumed that all other users having roles above or equal to this role will be able to view this data. This selection can be made from a "Can be seen by:" drop down list. This drop down list has a default role of *Owner*.

The data levels which users are able to see and the actions which they are able to perform are dependent on their personal role levels. Users at any given role level are able only to see information which is at an access level lower than or equal to that user's own role level. Any information having a level above that user's access level will be hidden from the users, and any corresponding actions will be disabled. Following from this, when a user opens a view and makes a request for data, that request is processed by the security system which will check the role of the user and return only data viewable by that role. For example, searches will only return results which lie within the access range of the user performing the search. A user's access levels concerning information can be customized by an administrator according to his/her preferences. Role 5 users will have all access privileges to the system.

All roles levels associated with the system must be given names (eg. manager, director etc).

**P.A.Y.H.R.** comes complete with default role names which are editable by a user of a suitably high access level. Default role names are as follows:

- Owner - Role level 5
- Director - Role level 4
- Manager - Role level 3
- Line Staff - Role level 2
- Data Entry - Role level 1

### 13.3 Add Users

Users may be added to the system only by users having administrative privileges. To add a new user to the system [open the User Manager](#) and click on the *New User* tab. This opens a *User Management* window where you are required to fill in information relevant to the new user account. The new user may be added to a specific group of users. New groups may also be added or deleted from this window. When a user is added to the system all views and actions for him are initially restricted by default. An administrator must then [Set Permissions](#) and restrictions for that user.

### 13.4 Set User Permissions

Setting user permissions allows you to define which views and actions may or may not be seen or edited by the users on the system. To set permissions for a particular user [open the User Manager](#) and click on the user's name from the *Users* list. Select a view from the *Views* list. This should open the items associated with that view in the *View Options* section. Check the items which are enabled for that user and uncheck those which are restricted. To enable or disable permissions for a user right-click within that user's '*Views*' view click on *Enable All Permissions* or *Disable All Permissions* respectively. To check or uncheck all items under a particular view right click within the *View Options* view and select *Check all / Uncheck all*.

### 13.5 Log User Off

A user having administrative privileges has the option to log off users which are presently logged in to the system. To log off a user [open the User Manager](#), and right click on a user whose *Logged In* status is set to *Yes* and select the *Log user off* option or select a user who is logged in and click on the *Log user off* button above the user manager.

### 13.6 Edit User

To edit the security settings for an existing user [open the User Manager](#), click on the user's name from the *Users* section then click on *Edit User* above the User Manager. This opens the *User Management* window from which changes may be made to the user's settings.

**Part**



## 14 Common Manager Functions

### 14.1 Find...

Most managers offers a *Find* function. This function is made accessible above each manager and has captions *Find Employee*, *Find Company*, *Find Department* etc... To find specific information open the relevant manager from the main menu to the left. Click on the *Find \*\*\** button above the manager, if this button exists, to open a search window where you are able to search for information according to specified search criteria. Select the *Exact Match* property if the information in all fields entered should appear in the results. Click *Search* to display results or *Cancel* to cancel the search. Results are displayed in the left view of the manager.

To view all results under a specific manager leave all fields in the the search window bank and click *Search*.

### 14.2 Delete...

This function allows you to delete employees, payrolls, income, deductions, companies, departments, users and other such data from the **P.A.Y.H.R.** database. To delete these entities you must open their relevant managers from the main menu to the left. Find the entity you would like to delete and double click on it to open its detailed information in the right view of the manager or simply select it (this is applicable only in the case of non-standard deductions since the deduction manager appears with only one view). Click on *Delete* at the top of the manager.

#### Addendum:

- Standard deduction categories cannot be deleted from the **P.A.Y.H.R.** system.

**Part**

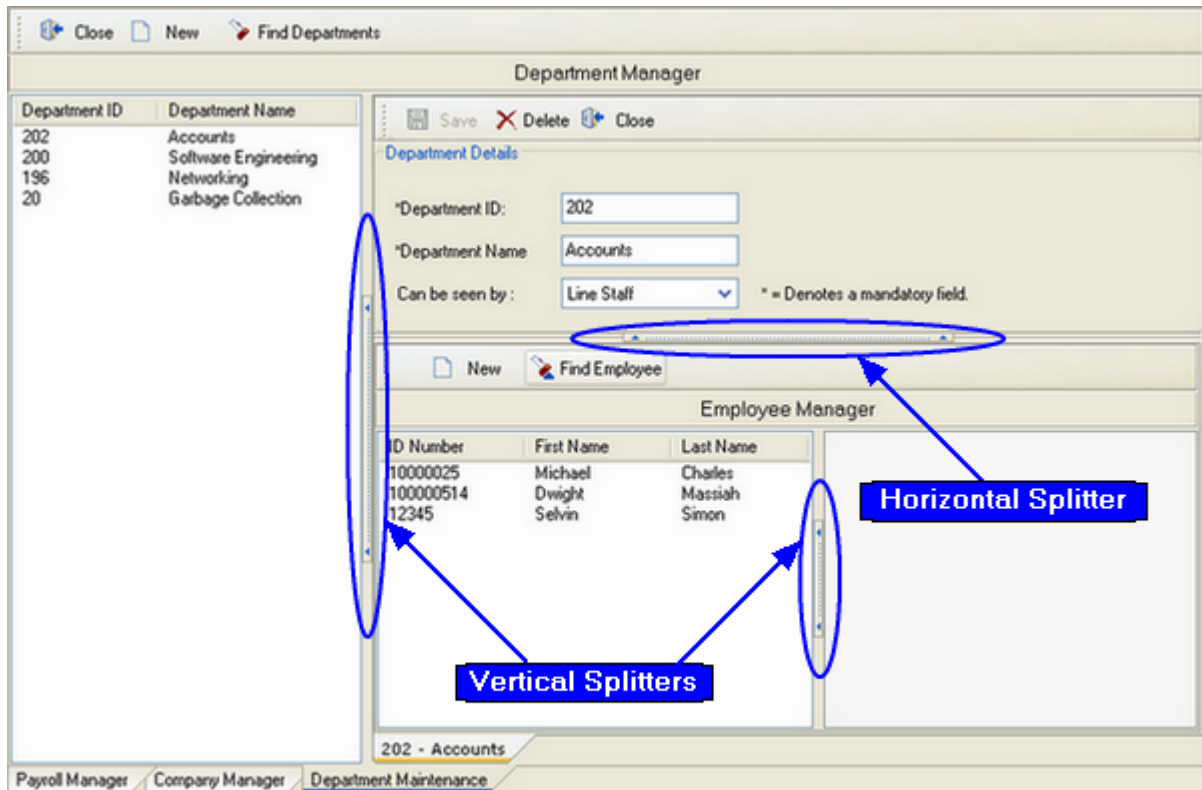




## 15 Working With Views

### 15.1 Resizing Views

A sub-view in any given main view may be resized by clicking and dragging a horizontal or vertical splitter of this sub-view if such a splitter exists.



[Resizing Views Diagram](#)

### 15.2 Columns and Grid Lines Within Views

**P.A.Y.H.R.** allows you organized viewing of data by offering the Show/Hide Grid option and customizing the selection of columns viewed in lists.

Grid lines may be added to any view which displays data in list form. To display or hide grid lines right click within the desired view and select the *Show/Hide Grid* option if it is available.

You may also show or hide specific columns displayed in a list view. This is done by right clicking within the view and selecting Columns. This opens the Column Editor showing all columns headings of the view. Check a column heading to display that column or uncheck a column heading to hide the column.

## 15.3 Sort Lists in Views

Views or sub-views displaying listed information may be sorted in ascending or descending order of sort key. To sort a list, click once on the column heading of the desired sort key. Lists may be sorted according to each field appearing in its tabular representation.

## 15.4 Closing and Reopening Views

A view or sub-view may be closed or reopened by clicking once on the lower horizontal or right vertical splitter of this view if such a partition exists. You may revert to a previously opened view or manager by clicking on its tab at the bottom of the manager or clicking on its link (if it exists) in the main menu to the left. In the various managers, detailed information can be completely exited by clicking the *Close* button at the top of the right view of each manager or by clicking on the exit sign to the bottom-right corner of the view. To entirely exit any given manager view you may click the *Close* button located above the manager or right click on that manager's tab below and select *Close Window*. You can also click the exit button at the bottom of the right view.

Viewing of managers may also be administered from the *Open Windows* box in the main menu to the left. *Open Windows* keeps track of all managers presently open. Double click on any manager from this box to revert to that manager's view.

See also:

[Resizing Views Diagram](#)

**Part**



## 16 Shortcuts

### 16.1 Keyboard Shortcuts

Key(s)	Action
F1	Opens the <b>P.A.Y.H.R.</b> help manual to the page relevant to the presently open view

# Index

## - A -

About P.A.Y.H.R. 3  
access levels 54  
Add a New Employee 14  
Add Assignment 16  
Add Company 44  
Add Course 17  
Add Leave 16  
Add Qualification 17  
Add Users 55  
Add/Edit Item 23  
Additional Deductions 20  
Additional Incomes 20  
administration 53  
Application of Deductions to Income 33  
Architecture 8, 53

## - B -

breaks 22

## - C -

Can be seen by 54  
Cert 26  
Certified 33  
Check all 55  
client 7, 8  
client database 7  
client-server 8  
clock 23  
Closing and Reopening Views 60  
Column Editor 59  
Columns and Grid Lines 59  
Company 43, 45  
Create Payroll 28

## - D -

Daily View 22  
data 7

Data Entry 54  
Data Security 54  
dataflow 26  
deductions 7, 20, 30, 33, 39  
Deductions Categories 39  
Deductions Manager 39  
Delete Assignment 16  
Delete Assignment. 16  
Delete Leave 16  
Delete Qualification 17  
Delete Report Category 50  
Delete Salary 18  
Delete Work Profile 18  
Delete... 57  
Department 47  
Departmental Information 48  
desktop database 7  
detailed view 23  
Director 54  
Disable All Permissions 55

## - E -

Edit Assignment 16  
Edit Deduction 40  
Edit Income 37  
Edit Leave 16  
Edit Qualification 17  
Edit Report Category 50  
Edit Salary 18  
Edit Timesheet 29  
Edit User 55  
Edit Work Profile 18  
Employee 13  
Employee Management 13  
Employee Manager 13, 48  
employees 7, 13  
Enable All Permissions 55  
Enterprise 7  
Exact Match 57

## - F -

F1 3, 62  
Filter By 30  
Finalized 28, 29  
Find... 57

Firebird 7

## - G -

Generate 28

Generate Incomes and Deductions 28

## - H -

H.R. 10

Help 3, 4

Help Manual 3

Help Topics 3, 4

HR 13

human resource 13

Human Resources 7

## - I -

Income 20, 30, 33

Income Manager 36

incomes 7, 30, 33, 36

Introduction 7

## - J -

job-costing 22

## - K -

Keyboard Shortcuts 62

## - L -

Leave Record 16

Line Staff 54

List 30

Log User Off 55

login 53

## - M -

Maintenance 10

Manager 54

Maternity 26, 33

MySQL database 7

## - N -

Navigate Help 3

New Assignment 16

New Company 44

New Deduction Category 40

New Department 48

New Income Category 37

New Leave 16

New Qualification 17

New Report Category 50

New Salary 18

New Salary/Wage 18

New User 55

New Work Profile 18

non-standard deductions 40

## - O -

Objectives 7

Open Windows 10, 60

Options 4

Other 26

Overtime 15, 33

Overtime1 26

Overtime2 26

Overtime3 26

Overtime4 26

Owner 54

## - P -

P.A.Y.H.R. 3, 7

P.A.Y.H.R. Help 3

P.A.Y.H.R. menu 10

password 53

Pay All Your Human Resources 7

payroll 7, 10, 26

payroll calculations 7

Payroll Creation Architecture 26

Payroll Creation Diagram 26

Payroll Info 29

Payroll Management 27

Payroll Manager 27, 28

permissions 53

Personal Information 15

## - Q -

Qualifications 17

## - R -

Regular 26, 33  
Report Categories 50  
Report Management 10, 50  
Reporting 50  
Reporting Manager 50  
Reporting Structure 50  
reports 50  
Resizing Views 59  
role 54

## - S -

salaries 7  
Salary 15  
Salary History 18  
Search 57  
Security 53, 54  
server 7, 8  
Service 7  
Set Permissions 55  
Show Breaks 23  
Show/Hide Grid 59  
Sort 60  
splitter 59, 60  
Standalone 7  
standalone version 7  
standard income categories 36  
system income categories 33

## - T -

time 22  
time allocation 22  
time card 26  
Time Sheet 19, 29  
timecard 22, 23  
timecards 22  
Timekeeping 22  
timesheet 19, 22, 33

## - U -

Unassigned 50  
Uncert 26  
Uncertified 33  
Uncheck all 55  
unfinalized 29  
Update 16, 18, 37, 50  
Use Breaks 22  
User income categories 33  
User permissions 53  
User Security 53  
users 53

## - V -

Vacation 26, 33  
View and Edit Income 37

## - W -

wages 7  
Work Profile 15  
Work Profile History 18  
work profile template 18, 45  
Work Profile Templates 45

