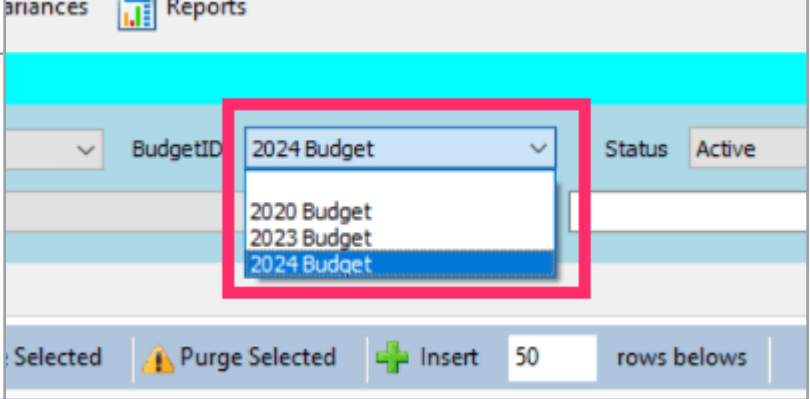
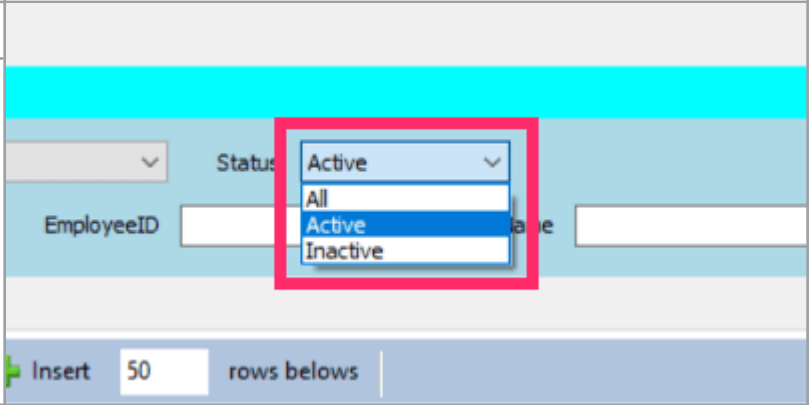
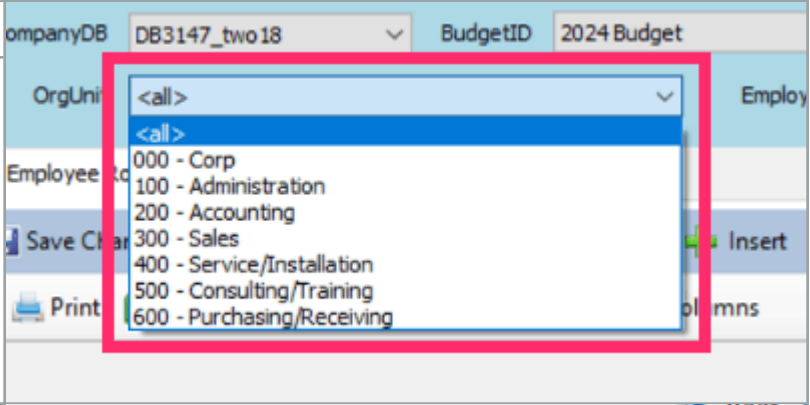
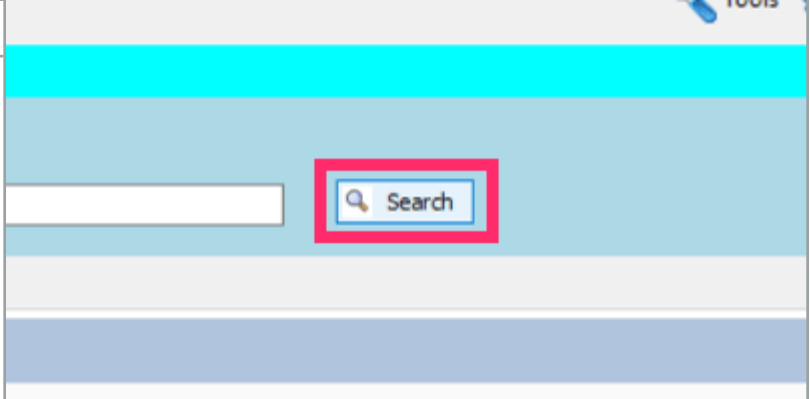

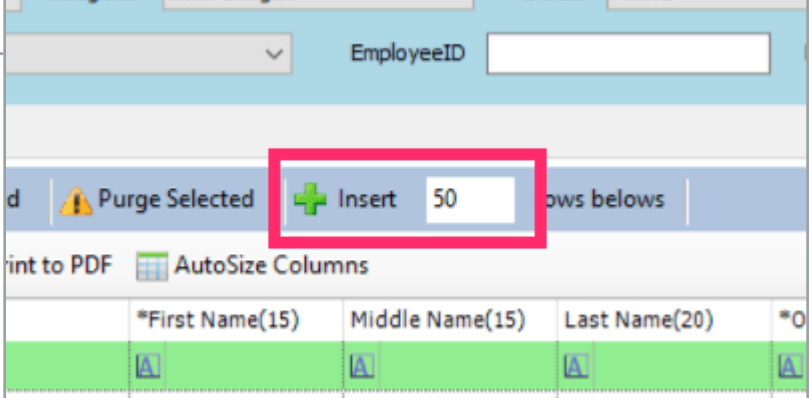

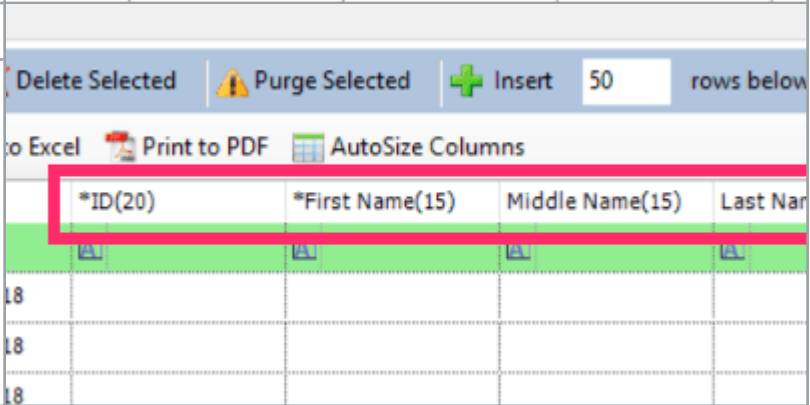

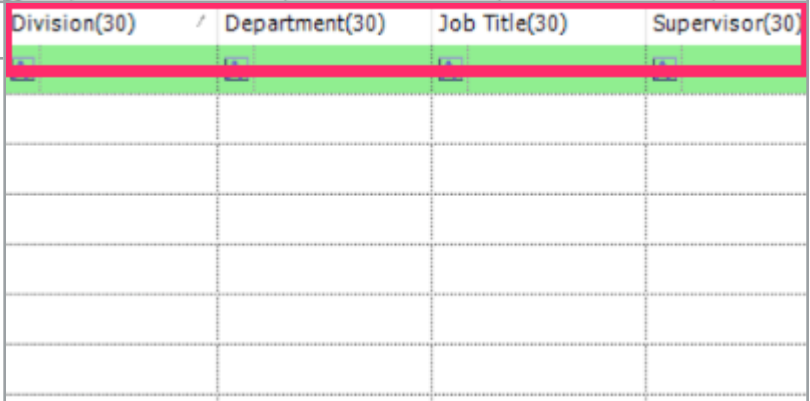


<p>1</p> <p> Dynamic Budgets User Guide for Payroll Employees Roster</p>	
<p>2</p> <p> Click on Payroll.</p>	
<p>3</p> <p> Click on Employees Roster.</p>	
<p>4</p> <p> Click on the CompanyDB dropdown list. Make a selection. Each company has its own roster.</p> <p>In this example, we will select DB3147_two18.</p>	

<p>5</p> <p>Click on the BudgetID dropdown list. Make a selection.</p> <p>In this example, we will select 2024 Budget.</p>	 <p>The screenshot shows a dropdown menu for BudgetID with options: 2020 Budget, 2023 Budget, and 2024 Budget. The 2024 Budget option is highlighted. The background shows a table with columns for BudgetID and Status.</p>
<p>6</p> <p>Click on the Status dropdown list. Make a selection.</p> <p>In this example, we will keep the default Active.</p>	 <p>The screenshot shows a dropdown menu for Status with options: Active, All, and Inactive. The Active option is highlighted. The background shows a table with columns for Status and EmployeeID.</p>
<p>7</p> <p>Click on the OrgUnit dropdown list. Make a selection.</p> <p>In this example, we will select all.</p>	 <p>The screenshot shows a dropdown menu for OrgUnit with options: <all>, 000 - Corp, 100 - Administration, 200 - Accounting, 300 - Sales, 400 - Service/Installation, 500 - Consulting/Training, and 600 - Purchasing/Receiving. The <all> option is highlighted. The background shows a table with columns for OrgUnit and BudgetID.</p>
<p>8</p> <p>Click on Search.</p>	 <p>The screenshot shows a search button with a magnifying glass icon and the text 'Search'. The button is highlighted with a red box.</p>

<p>9</p> <p> Note: The screen starts with 50 blank rows.</p> <p>For higher employee counts you will need to add more rows. Enter that number in the white box and click on insert.</p>	
<p>10</p> <p> Note: Only 4 fields are required(*) EmployeeID, First Name, Last Name, and OrgUnit. Middle Name and all other fields are optional.</p> <p>The maximum number of characters is noted to the right of each column name().</p>	
<p>11</p> <p> All other data fields on the screen are Optional.</p> <p>You can enter any type of any information into any field.</p> <p>The Department and JobTitle fields can be used as temp fields to transfer information to the payroll entry screens (GLAcct, or Salary Amount)</p>	

12



You can enter detailed comments about an employee or upload file attachments if necessary.

But **You must first save the employee records** before you can use comments or attachments.

Comments		Attachments	


13



You can copy and paste your employee data from excel into Dynamic Budgets.


Please export your data from your payroll system, arrange the columns as you see them in Dynamic Budgets, then copy & paste.

Company DB	Employee ID	First Name	Middle Name	Last Name
DB3147_two18	150	Daphne		Akery
DB3147_two18	104	Tyler		Ames
DB3147_two18	120	Bernice		Brown
DB3147_two18	115	Melinda		Cooper
DB3147_two18	100	Jess		Good
DB3147_two18	130	Terrie		Jackson
DB3147_two18	105	Nay		James
DB3147_two18	125	Matthew		Jones
DB3147_two18	101	Brenda		Joyce
DB3147_two18	106	William		King
DB3147_two18	103	Tiki		Thomason
DB3147_two18	110	Debbie		Venus
DB3147_two18	102	Frank		Willis

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

14

DB	Employee ID	First Name	Middle Name	Last Name	Org Unit
o18	150	Daphne		Akery	300
o18	104	Tyler		Ames	200
o18	120	Bernice		Brown	400
o18	115	Melinda		Cooper	300
o18	100	Jess		Good	000
o18	130	Terrie		Jackson	300
o18	105	Nay		James	200
o18	125	Matthew		Jones	300
o18	101	Brenda		Joyce	100
o18	106	William		King	100
o18	103	Tiki		Thomason	200
o18	110	Debbie		Venus	300
o18	102	Frank		Willis	000


 Paste your data from the excel report into Dynamic Budgets in sections using right-click and paste from the mouse or Control-V on your keyboard.

Do not attempt to paste over the Comments and Attachments columns, this will generate an error.

15

DB	Employee ID	First Name	Middle Name	Last Name	Org Unit
8	100	Jess		Good	
8	101	Brenda		Joyce	
8	102	Frank		Willis	
8	103	Tiki		Thomason	
8	104	Tyler		Ames	
8	105	Nay		James	
8	106	William		King	
8	110	Debbie		Venus	
8	115	Melinda		Cooper	
8	120	Bernice		Brown	
8	125	Matthew		Jones	
8	130	Terrie		Jackson	
8	150	Daphne		Akery	

16


 By default all employees are assumed ACTIVE.

You can uncheck a box to mark the employee as inactive.


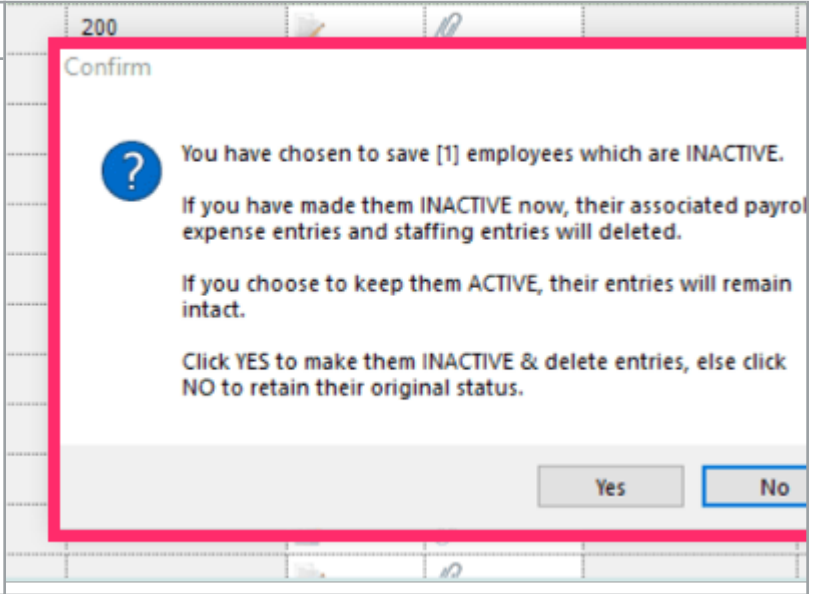

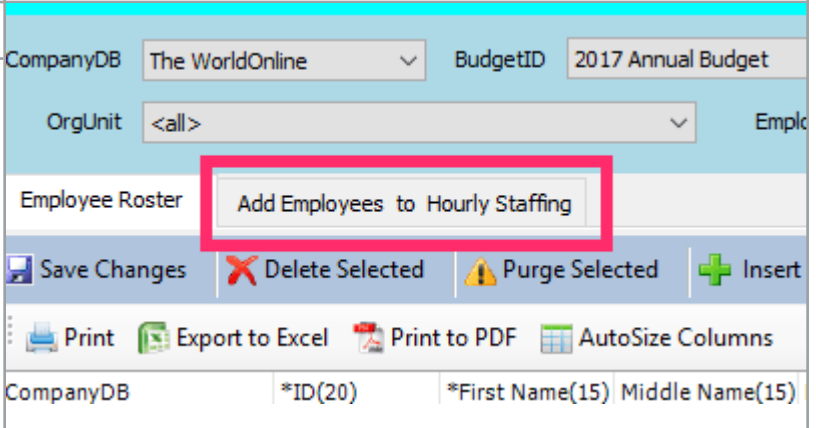

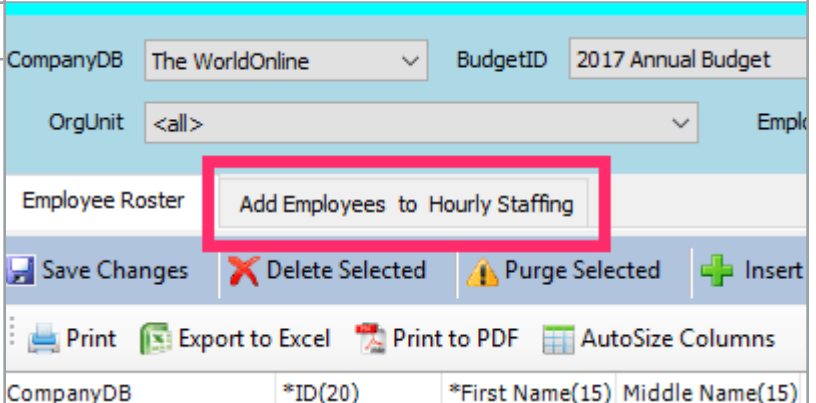
Only active employees can be added to the Payroll Entry Screens.

Job Title(30)	Supervisor(30)	Active	SalaryHourly
A	A	<input checked="" type="checkbox"/>	A
CEO		<input checked="" type="checkbox"/>	Salary
Vice President	Jess Good	<input checked="" type="checkbox"/>	Salary
CFO	Jess Good	<input checked="" type="checkbox"/>	Salary
Accounting Mana	Frank Willis	<input checked="" type="checkbox"/>	Salary
A/R Clerk	Tiki Thomason	<input checked="" type="checkbox"/>	Hourly
A/P Clerk	Tiki Thomason	<input checked="" type="checkbox"/>	Hourly
Marketing Manag	Brenda Joyce	<input checked="" type="checkbox"/>	Salary
Customer Service	William King	<input checked="" type="checkbox"/>	Salary
Customer Service	Debbie Venus	<input checked="" type="checkbox"/>	Hourly
Delivery Driver	Debbie Venus	<input checked="" type="checkbox"/>	Hourly
Customer Service	Debbie Venus	<input checked="" type="checkbox"/>	Hourly
Customer Service	Debbie Venus	<input checked="" type="checkbox"/>	Hourly
Customer Service	Debbie Venus	<input checked="" type="checkbox"/>	Hourly

17

 If you inactivate an employee and click **SAVE**, the application will warn you that it will delete the associated expense transactions and payroll screen entries for the inactive employee(s).

Department(30)	Job Title(30)	Supervisor(30)	Active	S
A	A	A	<input checked="" type="checkbox"/>	A
	Indirect		<input type="checkbox"/>	E
	Direct		<input checked="" type="checkbox"/>	E
			<input checked="" type="checkbox"/>	
			<input checked="" type="checkbox"/>	

<p> Note: There is no Undo, choose wisely.</p>	18	
<p> Do not use the "Add Employees to Hourly Staffing" tab unless its necessary.</p> <p>This tab is for project organizations to load every employee into every department in the company. It can create thousands of unnecessary records and slow down your system.</p>	19	
<p> The "Add Employees to Hourly Staffing" tab is a hidden feature. Please contact Dynamic Budgets support for assistance if you feel your organization needs this functionality.</p>	20	

21 Click on **Save Changes**.

A message will appear that reads, "**Saved changes to employees successfully.**"

22 Fields Meta 1-5 are user defined fields.

The column titles can be customized to make information easier to manage.

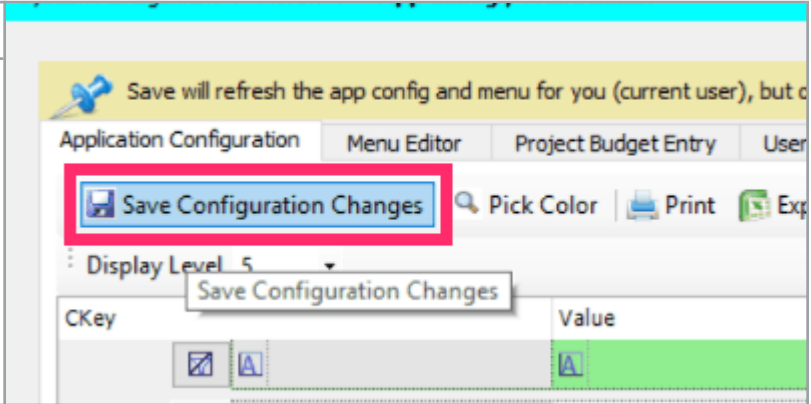
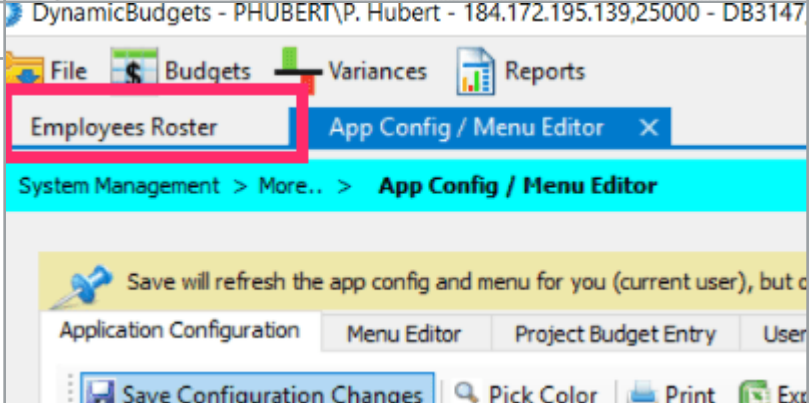
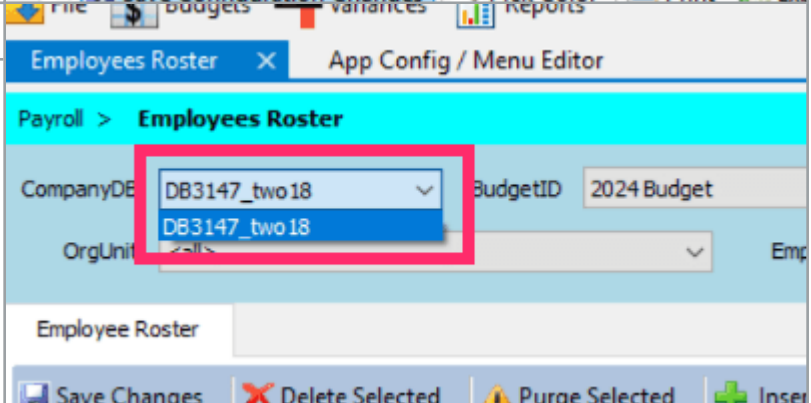
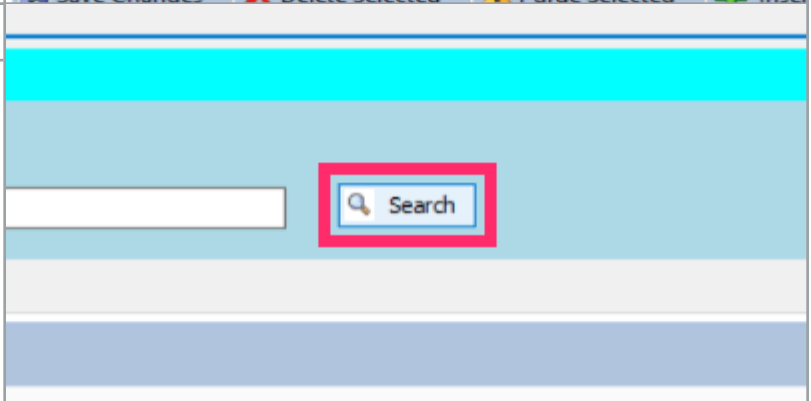
	META1	META2	META3	META4
8		6	1	1500
6		6	10	1000
7		5	1	1000



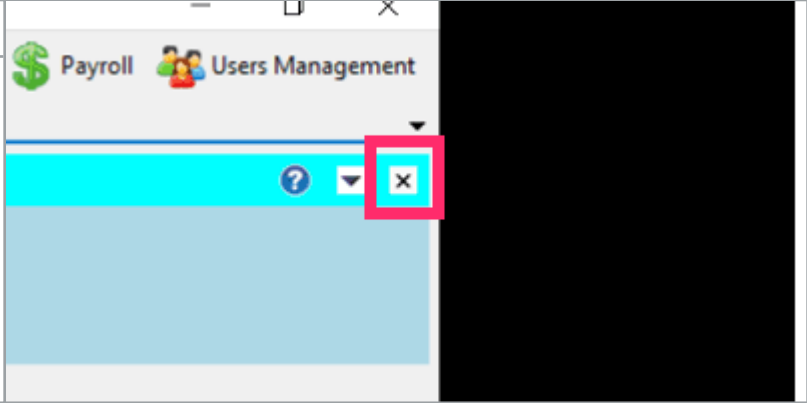

23 Click on **System Management**.

24 Click on **More**.

	META1	META2	META3	META4
8		6	1	1500
6		6	10	1000
7		5	1	1000
5		8	3	500

<p>25</p> <p> Click on App Config/Menu Editor.</p>	
<p>26</p> <p> Enter the System Manager password in the white box then click on Go.</p>	
<p>27</p> <p> Scroll down until you find "Employee Roster."</p>	
<p>28</p> <p> Enter the appropriate header names for each META column.</p> <p>Hit tab after each entry to make sure the change is accepted.</p>	

<p>39</p> <p>Now click on Save Configuration Changes.</p> <p>A message will appear that reads, "Saved Application Configuration Successfully."</p>	
<p>30</p> <p>Click on the Employees Roster tab.</p>	
<p>31</p> <p>Click on the CompanyDB dropdown list. Select the company you were working in again.</p> <p>In this example, we will select DB3147_two18.</p>	
<p>32</p> <p>Click on Search.</p>	

 <p>Now you will see the updated custom META header names have been replaced with the names you entered in the previous screen.</p>	33	<table border="1"><thead><tr><th>PayGrade</th><th>AnniversaryMonth</th><th>BirthMonth</th><th>ChristmasBon</th></tr></thead><tbody><tr><td>8</td><td>6</td><td>1</td><td>1500</td></tr><tr><td>6</td><td>6</td><td>10</td><td>1000</td></tr><tr><td>7</td><td>5</td><td>1</td><td>1000</td></tr><tr><td>5</td><td>8</td><td>3</td><td>500</td></tr><tr><td>2</td><td>1</td><td>9</td><td>250</td></tr><tr><td>2</td><td>4</td><td>3</td><td>250</td></tr></tbody></table>	PayGrade	AnniversaryMonth	BirthMonth	ChristmasBon	8	6	1	1500	6	6	10	1000	7	5	1	1000	5	8	3	500	2	1	9	250	2	4	3	250
PayGrade	AnniversaryMonth	BirthMonth	ChristmasBon																											
8	6	1	1500																											
6	6	10	1000																											
7	5	1	1000																											
5	8	3	500																											
2	1	9	250																											
2	4	3	250																											
 <p>Click on the X to close this window.</p>	34																													
 <p>That's It. You're Done.</p>	35	