

Paycode Mass Update 2018 Build Notes

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Build 18.004 – July 29, 2020

New PMU Pay Rate History

1. New Paycode Mass Update Pay rate History.

This is a new feature added to Paycode Mass update that will allow the user to generate records automatically when updating paycodes using the PMU utility window. By default this feature is not enabled and will not create records for previously updated paycodes.

Users can also pre-define Reason code that can be used when updating the Paycode. For initial setup should you require a reason code to be used first setup the Reason code which is accessible in Microsoft Dynamics GP >> Tools >> Setup >> Encore PayCode Mass Update >> Encore PMU Reason Code Setup.

Once open enter in a new Reason Code ID and description. You can have more than one Reason Code setup.



Once the Reason code is setup you can enable this feature to Write to history for Income and / or Deduction Paycode updates.

To enable for Income, open the PayCode Mass Update Relationship Setup window. (Microsoft Dynamics GP >> Tools >> Setup >> Encore PayCode Mass Update >> Encore PMU Relationship Setup)

Once open check the option Write to History. Optional to set a default Reason Code when using the Utility window set the Default Reason Code in this window. Select OK to confirm your changes.



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To enable this option for Deduction paycodes open the Encore PMU Deduction Setup. (Microsoft Dynamics GP >> Tools >> Setup >> Encore PayCode Mass Update >> Encore PMU Deduction setup)

Once open check the option Write to History. Optional to set a default Reason Code when using the Utility window set the Default Reason Code in this window. Select OK to confirm your changes.



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Once The feature is turned on the section reason for Change will Appear when opening the PayCode Mass Update Utility for the Process of Income / Deduction. It will default the Reason for Change value from the Setup windows.



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After you process your Next update when the feature is enabled it will write the update to a Historical record. You can review the records written by accessing the Employee card (cards >> Payroll – Canada >> Employee) Select the employee you wish to review. Then select the Paycode button to open the Payroll Employee Paycodes. Once open select the Additional menu and Employee Pay rate History option.



This will list all the paycodes that were written to history when updating the rates using Paycode Mass update Utility. The records will be listed in order by Paycode. They will list the Type of Paycode it is. If the Paycode that was updated had a Start date then it will indicate its Start Date. It will also list the Paycodes Original Amount and New Amount it was changed to. It will list the Date the Paycode was updated along with the user ID that updated the Paycode. If a Reason Code was set during the update it will list the Reason Code.



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Build 18.003 - Dec 10, 2019

Enhancements

1. New Employee ID zoom into Option

Users can now use the new zoom into option in the Paycode Mass Update Utility window to zoom into the selected employee's Payroll Employee Setup card.



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2. Updated Paycode Mass Update to be compatible for multiple Cut off Dates for the same Paycode.

Paycode Mass update will now be compatible with multiple cut off periods for the same Paycode. Should users insert the same Paycode and set a new Start date for the Paycode then the Paycode Mass update will now be updating the rate based on the Cut off Dates.

The User Interface will now have a new Date field under the Paycode selected on the Header. This date will default to the current computer date. You can then select which date you wish to use as the period date for your update.

Should the Pay codes associated to the employee have a Cut off Date set for that period then it will display that Pay codes Cut Off Date. Note that only the Paycode shown will be updated should the user Commit to the update.



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3. New Feature to Mass Update Deduction Pay Codes.

This new feature will allow users to perform Mass Updates to Employee Deduction Codes using the PayCode Mass Update Utility.

This update has a new Deduction Setup option.

The Encore PMU Deduction Setup is accessible from the Setup Pane of the HR & Payroll Menu.

This Setup window allows the user to specific the Exact Deduction codes that are allowed to be updated using the Paycode Mass Update Utility. If the code is not listed in this window, then it will not be updated. Unlick the Income Paycode there is no Parent / Child Relationship for this setup. Such Deduction Codes could include RRSP, as well as any Health Insurance adjustment codes.



<u>Encore PMU Utility</u> changes allows the user to select a new Process Option called Deduction. Once selected it will display all employees that Contain the Deduction Codes that were mapped in the Deduction Setup.

Users can then specify a specific Deduction Code using the Paycode Lookup section to filter to a specific Paycode.

Additional Filter options are:

- 1. Employee ID
- 2. Position
- 3. Class
- 4. Department



- 5. Tax province
- 6. Current Rate

You can then use the Set New Rate on the Header to set all employees to a new rate or manually set the New Rate for each Paycode for each employee in the section provided.

Only the Employees and their Pay Codes shown in the window will be updated to the New Rate that is set when you select the Commit Button.

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BH0010	Randall Boseman		UNION		-	5.2500	0.0000
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BH0040	Phil Spencer		UNION			5.2500	0.0000
BS0010	Robert O'Hara		BRSPE			5.0000	0.0000
BS0020	Lisa Jacobson		RRSPE		-	0.0000	0.0000
BS0030	Chris Cannon		RRSPE		2	5.0000	0.0000
MS0010	Joe Howard		RRSPE		20	0.0000	0.0000
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MS0030	Bryan Walton		RRSPE		10	0.0000	0.0000
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Encore PMU Deduction Import option is a new utility window that is accessible from the HR & Payroll Menu on the Utilities pane. This new window allows you to setup an import from a CSV file to import the new values into the Paycode Mass Update Utility window for deduction Pay codes. You can create a new ID specify the file location and how many header rows to skip on the file. It will automatically default the Matching Field ID with all the deduction Pay codes that were mapped in the Deduction Setup. You will need to map the Sample Field using the Sample Field lookup or setting the Column Position. Once mapped you simply need to press the Import to PMU Utility Button. This will open the Encore Paycode Mass Update Utility window for the Deduction process. It will then set the New Rates for each Paycode that was read in the file and that exist on the Employee Card.

You will also receive a report if there were any Exceptions for the import such as Employee does not exist, or Deduction code is not linked to the Employee.

The importer is a huge time saver for users that are using an excel spreadsheet to calculate each employee's deduction rates. This same excel spreadsheet can then be saved as a CSV file and used to import into the Utility to perform the update for all the employees.



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Resolved Issues

1. Resolved issues with Validation Notification indicating Product is not registered.

Issue was observed that should user enter in the Product Registration keys and then immediately attempt to access a product window they would receive the validation notification that the product is not registered. If they relog into GP the issue would not appear. This problem is now resolved.

- 2. Fixed problem with SQI Validation error when updating Employee Pay codes. Problem observed that user could receive error " Error in executing SQL script CW_Update_Row_Temp_Table-3". The error occurred because the Parent Paycode did not have an EI value set. This issue is now resolved.
- 3. Fixed issue with error when zooming into Paycode link in the Paycode Mass Update Utility window.

Issue noticed that when user has Paycode Setup window already opened should they select the Paycode link in the PMU window they would receive an error. This issue is now resolved.

4. Resolved problem with Paycode Description not clearing. Problem noticed that should user have selected a Parent Paycode in the Paycode Mass update Utility window and then switch the process to use it failed to clear the

Mass update Utility window and then switch the process to use it failed to clear the Paycode Description displayed. This is now resolved.

Build 18.002 - Sept 04, 2018

Enhancements

1. Disabled Preview prompt validation Message for Vacation Process



This validation would normally occur when selecting Commit if Preview was not first selected. As the Vacation process has no child codes to preview this message is not needed. The Preview prompt validation will only occur for the Paycode process.

Resolved Issues

1. Resolved issues with Paycode Mass Update Report failing SQL connection. Issue was observed that when printing the Paycode Mass Update Report for the Paycode Process. Report failed to obtain SQL connection to display the correct data. This is now resolved.

Build 18.001 – Feb 07, 2018

Enhancements

1. Initial Product Release of Paycode Mass Update for GP2018. Build based on Build 16.007 for GP2016.



Additional Product Support Resources

Access the latest Product Builds: <u>http://www.encorebusiness.com/solutions/#microsoft-dynamics-add-ons</u>

Request registration keys: regkeys@encorebusiness.com

Visit our Advanced SmartList product page <u>here</u> on our website to access:

- User Manuals, click on the Resources Option
- Product demos, click on the Resources Option

Product Support:

Email: <u>Support@encorebusiness.com</u> Phone: 1.888.898.4330 Online submission form: http://www.encorebusiness.com/support/encore-apps/

Support Request Tip:

To assist in expediting the review of any issues please ensure that the following information is provided with a support request:

- What product is the support inquiry for?
- What Version of GP is used?
- What is the build number installed for the product?
- (this can be found by logging into GP as SA and going to Microsoft Dynamics GP > Tools > support > system > Encore product registration Once there locate the product from the list and the Build number would be listed on the right hand side under Version)