Payroll Tool Manual

WorkDo Tool Guide
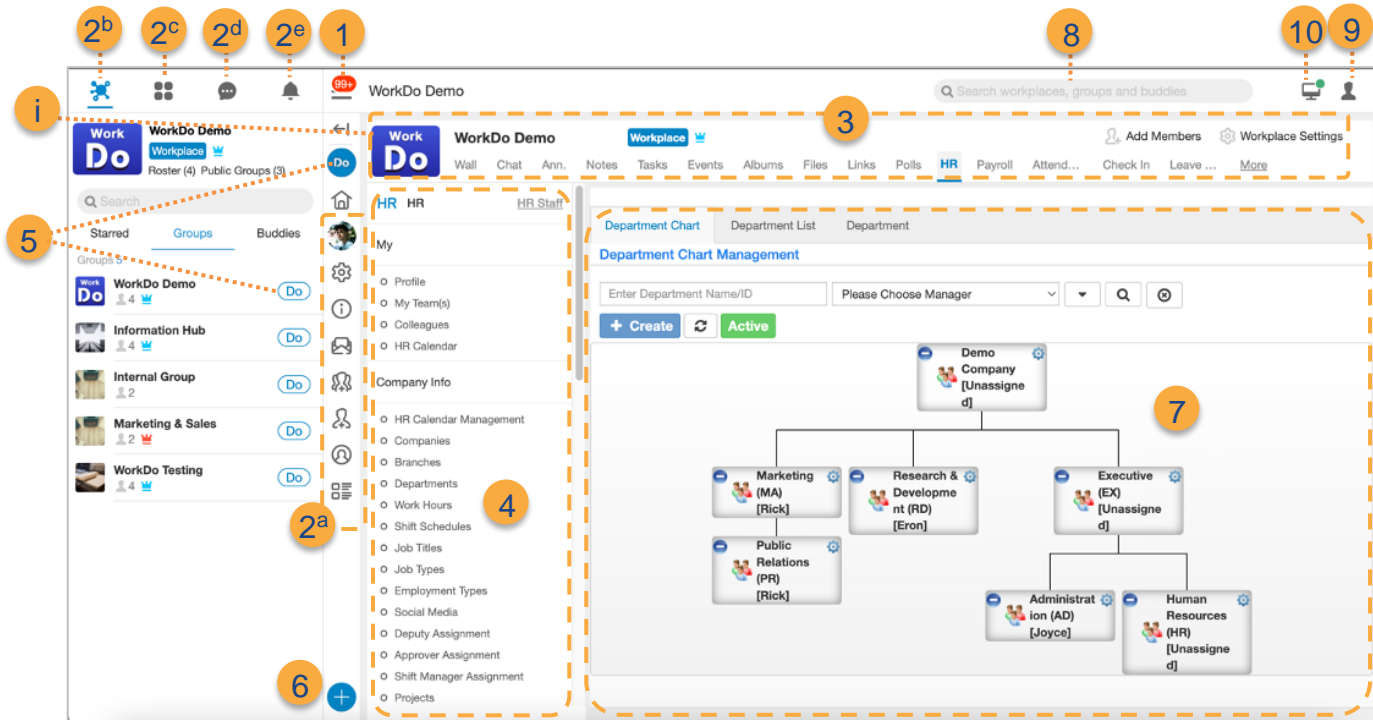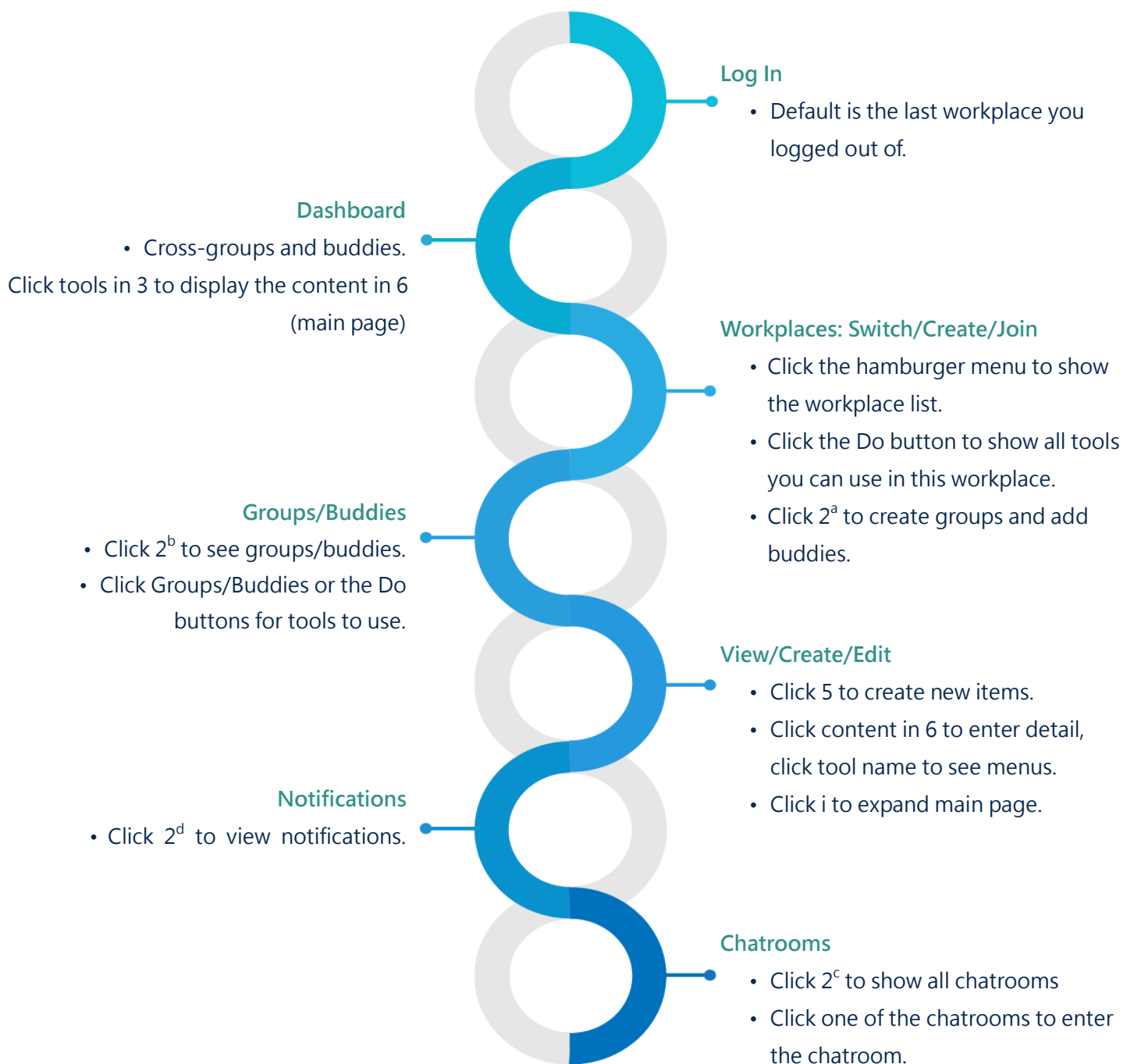
Table of Contents

Page Navigation

Welcome to WorkDo! This document will guide you through the steps in setting up the HR tool using the web interface. We will begin with the basic page navigation!

i	Expand/Close	Expand or close general navigation areas, a button panel will appear when the navigation area is closed.
1	Workplaces	Switch between workplaces/My Upcoming/My Shelf and Join/Create Workplaces.
2	Main Menu	a. Workplace Settings: The main workplace functions.
		b. Group/Buddy list: Your list of groups and buddies.
		c. Dashboard: Your personalized shortcuts.
		d. Chatrooms: All the chatrooms you are in.
		e. Notifications: All notifications related to you.
3	Level Options	The tools, functions, and options are available with respect to your level and your role.
4	Sub-Menu	Displays 2, 3, and 5 functions respectively.
5	Do Button	All the tools you can use in the workplace.
6	Create Button	Create new items.

7	Main Page	The main working area, it displays contents from 1-6.
8	Search Bar	Use the search bar for keyword search.
9	My Settings	User's personal settings such as preferences, account management and password.
10	Connection	Your connection status.

Check Image I-1 to quickly start navigating WorkDo!

Log In
- Default is the last workplace you logged out of.

Dashboard
- Cross-groups and buddies.
Click tools in 3 to display the content in 6 (main page)

Workplaces: Switch/Create/Join
- Click the hamburger menu to show the workplace list.
- Click the Do button to show all tools you can use in this workplace.
- Click 2[a] to create groups and add buddies.

Groups/Buddies
- Click 2[b] to see groups/buddies.
- Click Groups/Buddies or the Do buttons for tools to use.

View/Create/Edit
- Click 5 to create new items.
- Click content in 6 to enter detail, click tool name to see menus.
- Click i to expand main page.

Notifications
- Click 2[d] to view notifications.

Chatrooms
- Click 2[c] to show all chatrooms
- Click one of the chatrooms to enter the chatroom.

▲ Image I-1. Quick Start

II Advanced Tools

WorkDo has many tools for different levels within a workplace. This means workplaces, groups, and buddies all have a specific Do button and a set of tools to use. Please see Table II-1 for available tools at each level.

Advanced tools such as Payroll, Attendance, Check-In, Leave, Leave Pro, Overtime, Expenses, and Approvals are dependent on the HR tool. The HR tool is activated once you have created a workplace and need to manually activate the advanced tool according to your company's needs. This also means the HR tool needs to stay activated for the other tools to function properly.

▼ Table II-1. WorkDo Advanced Tools

Tool	Workplace	Group	Buddy	Dependency
HR	●	x	x	
Payroll	●	x	x	HR
Attendance	●	x	x	HR
Check In	●	x	x	HR
Leave	●	x	x	HR
Leave Pro	●	x	x	HR
Shift	●	x	x	HR required for clock in/out
Overtime	●	x	x	HR
Timesheet	●	x	x	HR
Expenses	●	x	x	HR
Approvals	●	x	x	HR
Conf. Rm	●	x	x	
CRM	●	x	x	
Cashbook	●	●	●	

Tool	Workplace	Group	Buddy	Dependency
Phonebook	●	●	●	
We Buy	●	●	X	
IOU	●	●	X	

Ⅲ Payroll: Easy Payroll Management

When we say WorkDo is flexible, we mean it! And our Payroll tool reflects just that! The Payroll tool calculates employee salaries based on your company salary calculation formula, this means that this tool can fit into any company's payroll system and for any salary structure. So, whether it's for fixed income, hourly pay, quarterly bonus, or year-end bonus, Payroll will get the job done!

What's good about Payroll is if you had used a set of formulas for a salary or pay, you can keep using it for future salary calculation, so long the variables, parameters, and formula stay unchanged. This semi-automatic process saves valuable time for the HR and Accounting Departments.

Another benefit of the Payroll tool is sending payslips to the employees when the salary calculation is done. And employees could view their detailed payslips on their phones.

- **For teams that only use Payroll to send employee payslips**
  For teams that use another payroll system but want to use WorkDo to send employee payslips, please skip to STEP 2-c.

- **For teams that want to use Payroll as their default payroll system**
  Please carefully follow all the steps and instructions in this manual to set up all the variables and formulas the first time around. Doing so will help you learn how to properly use this tool and speed up the process for future runs.
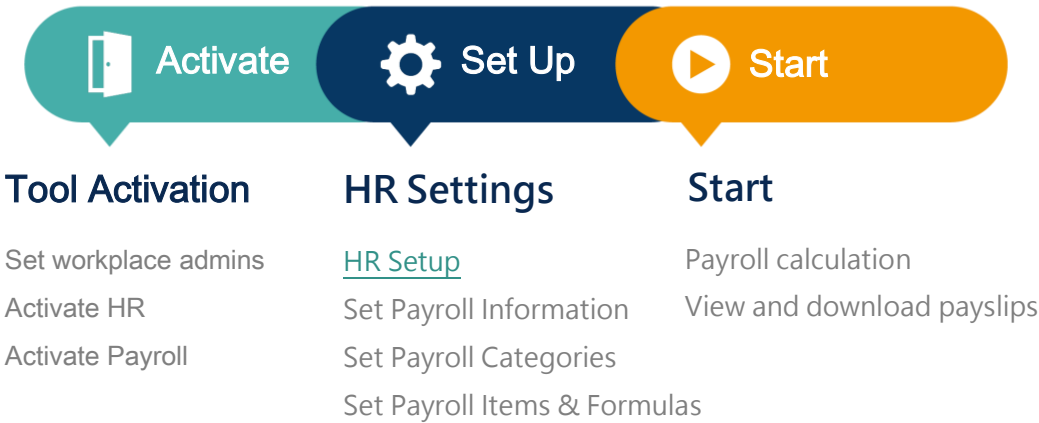
The flexibility of the Payroll tool is achieved with the help of the HR tool (see Table III-1), therefore, before enabling the use of Payroll, please refer to the HR Tool Manual and input all the necessary employee information therein.

▼ Table III-1. Payroll-HR Dependency

HR Setting	Dependency (* must set)
*Employee Profiles	Employee accounts must be bound to the workplace to use Payroll. Name, Employee ID, On Board Date and/or Resign Date are required for salary calculation.

Ⅳ Set Up

This section will guide you on how to set up the Payroll tool. The process includes 3 stages, and it requires a member with the HR Staff tool role to do so. The Payroll tool is connected to the HR tool, so please refer to the HR Tool Manual for details.

Activate	Set Up	Start
Tool Activation	**HR Settings**	**Start**
Set workplace admins	HR Setup	Payroll calculation
Activate HR	Set Payroll Information	View and download payslips
Activate Payroll	Set Payroll Categories	
	Set Payroll Items & Formulas	

▲ Image IV-1. Setup Process

Each step of setting up requires you to prepare different data. Please follow Table IV-1 to prepare these data before setting up Payroll.

▼ Table IV-1. Required Data

Procedure	Requirement	Note
Set tool roles	✓ Activate Payroll ✓ Select tool admins	✓ Done by the workplace admins
Tool setup	✓ Complete HR tool setup	✓ Done by the HR Staff of HR tool
Payroll setup	✓ Set variables and formulas ✓ Employee base salary and data	✓ Done by the HR Staff of the Payroll tool.

STEP 1 . Tool Activation

WorkDo has two types of admins that help your workplace manage and control information access, they are workplace admins and tool admins, as seen in Table Step 1-1.

Workplace admins include the owner and multiple admins that can adjust workplace settings. Normally, the workplace admins are the management of IT employees. The tool admins control the data others see per tool. Different tools could have different members as tool admins. The tool activation is done by the workplace admins.

▼ Table STEP 1-1. Admin Authorities

Authority	Workplace Owner	Workplace Admin	Tool Admin
Delete workplace	●	x	x
Change workplace ownership	●	x	x
Maintain workplace settings	●	●	x

Authority	Workplace Owner	Workplace Admin	Tool Admin
Activate workplace tools	●	●	x
Change tool roles	●	●	x
Maintain tool settings	x	x	●
Maintain tool data	x	x	●

a.Assign Workplace Admins

Based on the Page Navigation, you can verify your workplace admin status by following the steps below.

① Click on the Roster to view all workplace admins.

② The Workplace Owner is marked with a red crown while the workplace admins are marked with a blue crown. Owner and admins can skip to Step 1-b Tool Box.

③ Click Close to return to the Dashboard Wall.

According to Table Step 1-1, workplace admins are an integral role in maintaining all

the settings in the workplace. If necessary, you will need to ask the owner or an admin to assign you the workplace admin role.
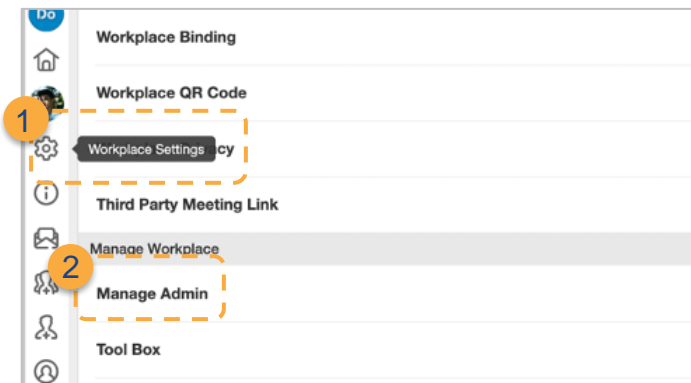
1 ▸ Click the gear icon for the Workplace Settings.

2 ▸ Manage Admin.
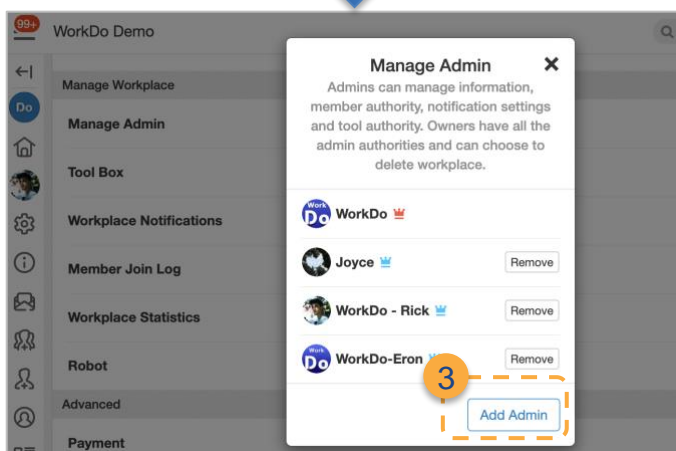
Red crown = Owner.
Blue crown = admin.

3 ▸ Add Admin.
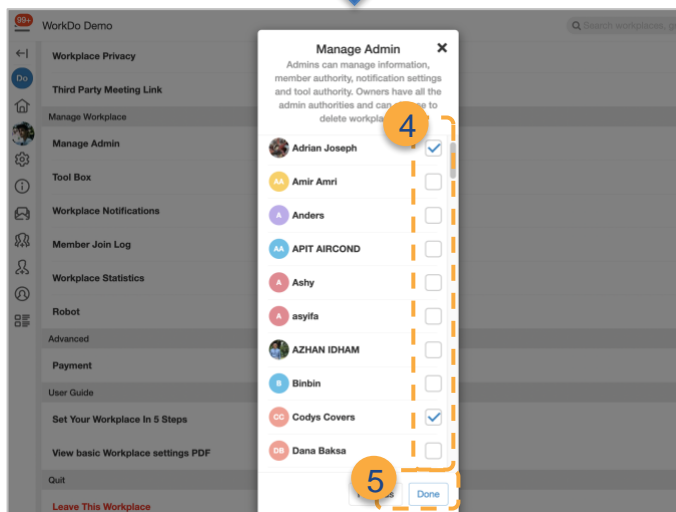
4 ▸ Member select.

5 ▸ Click Done to finish.

6 ▸ New admins will see the new options available once they refresh the browser.

STEP
1
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b
c
2
a
b
c
d
✓

b.Tool Box

Congrats on becoming an admin, you can now go to Tool Box in workplace settings to activate or manage tools and to manage members' tool roles, simply follow the steps below.
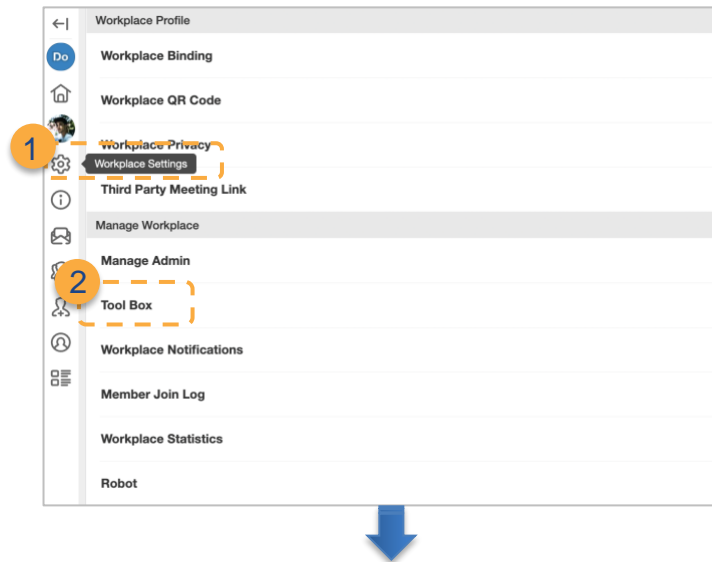
1 ▸ Click the gear icon for the Workplace Settings.

2 ▸ Click Tool Box.
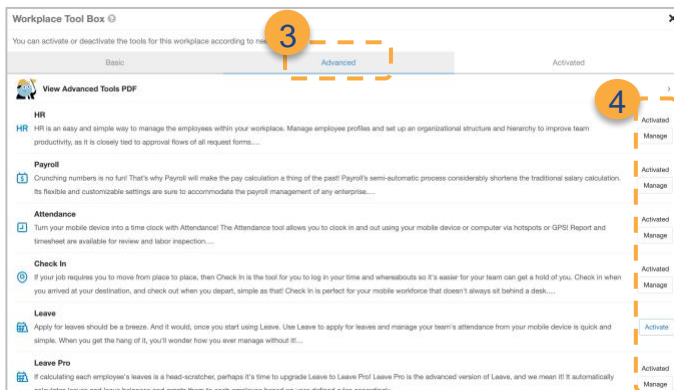
Default is set to the Activated tool tab.

3 ▸ Click the Advanced tool tab to activate tools.

4 ▸ Click Manage to assign tool roles.

c.Set Tool Roles

Many advanced tools require some members to take on the administrator role to manage access to sensitive workplace information.

Please read the description of the roles for each tool carefully when assigning tool roles to each member within the workplace.

Tool Role	Authority	Description
No Role	The Payroll tool is not available to these employees.	● Could be used for interns or part-time employees.
Employee	Employees may view and download their payslips.	● The default tool role for all employees.
HR Viewer	HR Viewers may review all payroll data and settings without the ability to edit.	● Suitable for managers and supervisors.
HR Staff	The highest access level of the Payroll tool.	● The workplace owner inherits the HR Staff tool role by default upon tool activation.
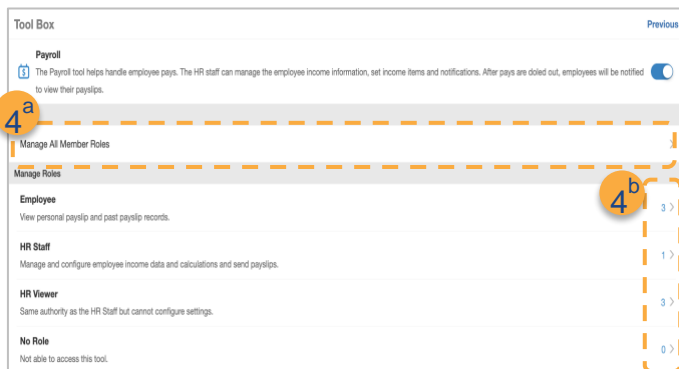
Following step 3, click the Manage button to see the tool and role info.

4 ▸ Change tool roles.
  a. Click Manage Roles.
  b. Click Employee.
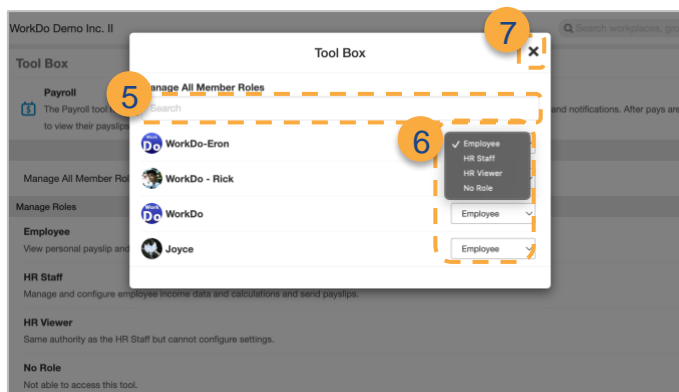
5 ▸ Enter the name in the search bar to quickly find the member.

6 ▸ Use the drop-down menu to select a role for the member. Repeat this process until everyone's role is correctly set.

7 ▸ Press X to close the window.
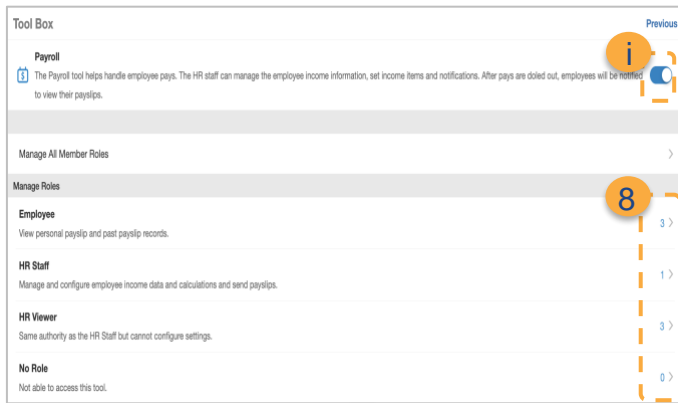
8 ► Confirm whether the member count for each role is correct. If not, repeat Steps 5 and 6.

i ► The blue switch means the tool is activated; toggle the button to deactivate (grey).
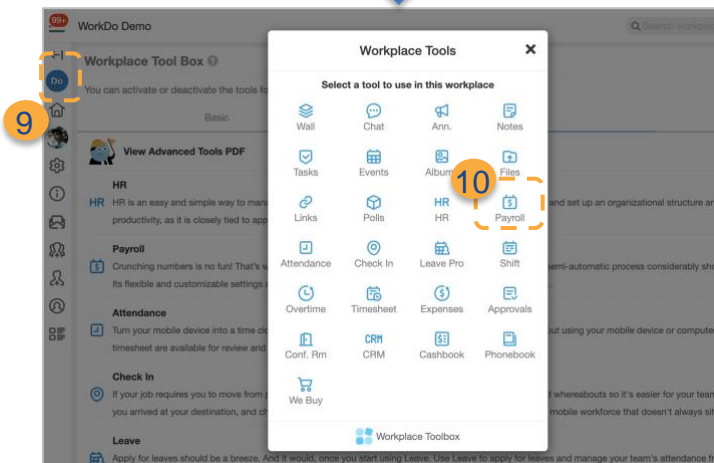
9 ► Click the Do button to open up the workplace tool box.

10 ► Select the Payroll tool.

STEP 2 . Set Salary Structure

Before we begin, please note that you must first set up the HR tool for Payroll to take effect. So, if you haven't done so, please do it first, then come back to the Payroll tool.

Before implementing a payroll management system, your HR and Accounting departments have likely been using a spreadsheet to calculate employee salaries. The Payroll tool aims to change that, and with its flexibility, it can satisfy any company's needs for a payroll management system and calculate the correct pay for every employee.
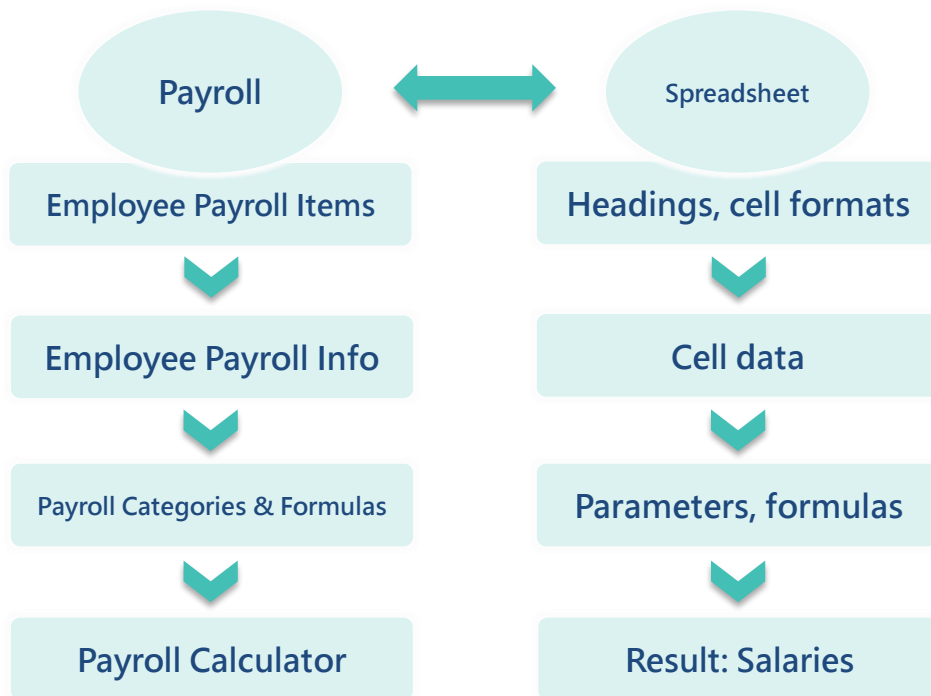
▲ Image STEP 2-1. Payroll to Spreadsheet Function Comparison

Image STEP 2-2 is the comparison between the payslip screen to an actual payslip. Following the manual instructions, you too, can use the Payroll tool to create detailed payslips like the image below.

▲ Image STEP2-2. Payslip to Spreadsheet Comparison

Payroll Formula Details

Enter a Payroll Formula Name 🔍 ⊗

➕Add New

100 ⌄ Records/Page   Total Records: 11

Payroll Formula	Pay Category	Equation
Gross Income	Salary (Earning)	$Base Salary + $Supervisory ... ay (Level I Supervisors) + $Supervisory Differential Pay (Level II S
Project Bonus	Bonus (Earning)	$Bonus
Employee Income Tax	Income Tax (Deduction)	$Gross Income * 0.05
Employee Health Ins	...onal Health Insurance (Deduction)	$Gross Income * 0.04
Pension Premium	...sion (Employer Copay/Others)	$Gross Income * 0.02
Compliance I	Income Tax ...	$Gross Income * $Government Compliance ...
Compliance II	Income Tax (Deduction)	$Gross Income * $Government Compliance ...
Personal Leave	Leave Deduction (Employer Copay/Others)	$Personal Leave(Hour)
Overtime Pay	Overtime Pay (Earning)	$Base Salary / 40* $Total Overtime Hours * 1.5
Holiday Bonus	Bonus (Earning)	$Base Salary /4
Take Home Pay	Salary (Earning)	$Gross Income - $Compliance I - $Compliance II - $Employee Income Tax - $Employee Health Insurance -

1 Add a parameter?
EMPL Payroll Items

2 Employee variables
EMPL Payroll Info

4 Displayed on payslip?
Payroll Categories

3 Set equations
Payroll Formula

These settings and data are required for payroll calculation.

▲ Image STEP2-3. Payroll Flow Diagram

a.Set Parameters: Employee Payroll Items

Because each employee's pay grade is different, so some parameters may differ from one employee to another. This is usually done with a spreadsheet as shown in Image STEP 2-1. But first, you need to set the Employee Payroll Items for the cells and cell formats used in your spreadsheet for the variables required to calculate the employee salaries. Please refer to Image 2-1 Payroll to Spreadsheet Function Comparison for formats and default values.

▼ Table STEP 2-a. Employee Payroll Items Field Descriptions

Field	Description	Note
Expansion Name	Field Names will not show up in the payslips, you can set whatever is easy to understand for you.	Cannot be named the same as Payroll Formulas in STEP 2-d.
Type	Percentage, dollar amount or numeric.	Cannot be edited once set.
Default Value	A value that is applied to all employees. It is recommended that you input a value that fits most employees.	Refer to STEP 2-b for employees who do not use this preset value.

If there are different kinds of bonuses, allowances, and subsidies given to employees based on ranks and a series of formulas, follow the instructions to set these payroll variables for salary calculation.

● **When do I add a payroll variable as opposed to a payroll formula?**

Same amount for every employee	Different amount for each employee
⌄	⌄
STEP 2-c - 2-d	**STEP 2-a - 2-d**

E.g.

Holiday Bonus
$500.00 per person

c. Payroll Categories: Set a category for a payroll formula.
d. Payroll Formulas: Enter a formula and input Holiday Bonus for 500.00.

E.g.

Performance Bonus

a. EMPL Payroll Items: Add bonus percentage.
b. EMPL Payroll Info: Input a percentage for each employee.
c. Payroll Categories: Set a category for the payroll formula.
d. Payroll Formulas: Add Performance Bonus formula and use the EMPL Payroll Items in the equation.

STEP

1
a
b
c
2
a
b
c
d
√

🔔 **Note**

➲ To avoid calculation errors and discrepancies, Employee Payroll Items can only be edited but not deleted.

➲ If there are any changes, be sure to run STEP 3-a-6[c] for them to take effect before sending employee payslips.

- **How to incorporate leave deductions and overtime pay into payroll calculation?**

Leave Pro and Overtime tools are integrated with Payroll. The system will list all the leave and overtime requests within the payroll period for you to select which ones are applicable. Please see STEP 2-d Set Payroll Formulas for details.

As for the Attendance tool, our dev team is hard at work integrating it into Payroll. Until then, employees' attendance must be manually calculated and then inputted into the payroll system. But you can choose one of the following methods to incorporate into the salary calculation.

- ➲ **Input the dollar amount (Recommended)**

  You may use the Attendance tool you manually calculate lateness and absences into the deductible dollar amount, then create a payroll item and input it into the formula.

- ➲ **Create a variable using Employee Payroll Items**

  You may create a variable for abnormal hours and a parameter for the total work hours in the equation for calculation. However, this method is not recommended due to:

  - Employee Payroll Items cannot be deleted. Once created, they appear in the Employee Payroll Info. So, when the Attendance tool has been successfully integrated, rendering these fields useless and you need to take extra care not to input values by mistake.
  - The variable changes month to month, and if the number is not carefully inputted, it will affect the outcome of the payroll calculation.

  Then again, if the result of the payroll calculation is incorrect, you can still manually adjust it through STEP 3-b.
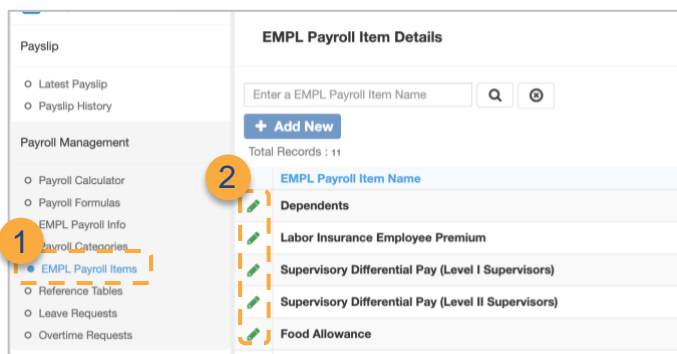
Edit Employee Payroll Items

1 ▸ Click EMPL Payroll Items.

2 ▸ Click the Edit icon.

Update EMPL Payroll Item

• EMPL Payroll Item Name	Base Salary
Type	Amount
• Default Value	0

(3) ✔ Edit ⊗ Reset ◄ Cancel

(3) ▸ Fill out the information.

(4) ▸ Click v Edit to finish.

Payslip

○ Latest Payslip
○ Payslip History

Payroll Management

○ Payroll Calculator
○ Payroll Formulas
○ EMPL Payroll Info
○ Payroll Categories
● EMPL Payroll Items
○ Reference Tables
○ Leave Requests

Enter a EMPL Payroll Item Name 🔍 ⊗

(5) + Add New

Total Records : 11

EMPL Payroll Item Name

🖉 Dependents
🖉 Labor Insurance Employee Premium
🖉 Supervisory Differential Pay (Level I Supervisors)
🖉 Supervisory Differential Pay (Level II Supervisors)

Repeat this step for all variables.
(Skip to STEP 2-b if not required)

(5) ▸ Click + Add New.

Update EMPL Payroll

• EMPL Payroll Item Name	Income Tax
Type	Percentage
• Default Value	6.5

(6)

(7) ✔ Edit ⊗ Reset ◄ Cancel

(6) ▸ Fill out the information.

(7) ▸ Click v Edit to finish.

b.Edit Employee Payroll Variables: Employee Payroll Info

Each employee's payroll information is different, so all the payroll variables will need to be entered for payroll calculation. Compared to a spreadsheet, we have entered the headings for the variables last step, so now we will input the values of these variables for all employees. You can do this by the employee or use the template to quickly input the values for all employees.

Before we begin, please be sure to complete the Employee ID, Name, On Board Date, and/or Termination Date settings under the Employee Profiles option as written in the HR Tool Manual. These settings will be carried over to the Employee Payroll Info for payroll calculation.

Using the Employee Payroll Info template, you will find that all Employee Payroll Items you created earlier are generated and highlighted in yellow, and the information entered in HR's Employee Profiles [1] is filled out. Simply enter the rest of the data and upload it back to WorkDo and you are all set.
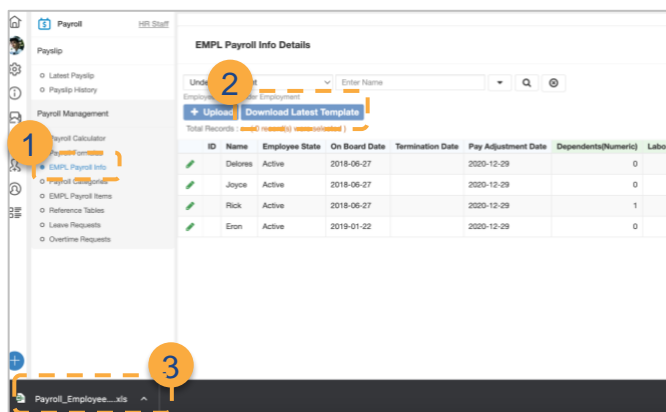
Batch input Employee Payroll Info (Follow Steps 1 & 7-9 for individual input)

1 ▸ Click EMPL Payroll Info.

2 ▸ Download Latest Template.

3 ▸ Open the file.

4 ▸ Carefully read the instructions for data input.

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[1]The Suspension Date and Termination Date are needed to determine whether qualified employees fall within the effective payroll period and the prorated pay they receive as described in STEP 3-a-3a.

5 ▸ Click EMPL Payroll Info tab and fill out all employee salary numbers and save the file.

6ᵃ ▸ Click +Upload to upload the information back to WorkDo.

6ᵇ ▸ Select the file.

6ᶜ ▸ Click Upload or select another file to upload.

6ᵈ ▸ Click Upload to complete.

7 Verify & edit
Verify employees' salary numbers, click the Edit icon to update.

8 ▸ Edit the numbers.

9 ▸ Click Save to finish.

c.Set Payroll Categories

In STEP 2-d, you will be asked to enter the Payroll Formulas for salary calculation. But before then, the formulas will be fitted into a Payroll Category, which tells the system whether the result of a formula is an earning or a deduction. Simply put, the results from the Payroll Formulas are fitted with a mathematical operational property. Together, they determine the net salary of every employee.

Payroll Category Name	Bonus
Type	Earning
Taxable	Yes
Category of Income	

Payroll Items that use this category

100 ∨ Records/Page	Total Records: 2

Payroll Formula Name

Project Bonus

Holiday Bonus

E.g. Description

Project Bonus and Holiday Bonus are under the Bonus category.

The Bonus category is an Earning, meaning that it is a positive value, whereas Deduction gives a negative value when they are incorporated into the Payroll Formulas.

▼ Table STEP 2-c. Payroll Categories Field Descriptions

Field	Description	Note
Payroll Category Name	The Payroll Category Name will not appear in the payslips. HR Staff can name it whatever they can easily understand.	
Type	Select a type for the result of a payroll formula. ✓ Earning: A positive value is added to the gross salary and will appear on the payslip. ✓ Deduction: A Negative value is deducted from the gross salary and will appear on the payslip. ✓ Reference: A neutral reference category that is used by other formulas and will not appear on the payslip. ✓ Employer Copay/Others: A neutral category type and appears on the payslip.	
Taxable	For HR Staff's reference only.	
Category of Income	For Taiwan only, not applicable in other regions.	

➲ Because Payroll Formulas are fitted with a Payroll Category for salary calculation, to avoid inconsistencies, Payroll Categories cannot be deleted.

➲ You must reload the Payroll Formulas listed in STEP 3-a-3[c] if there are any changes to the Payroll Categories.
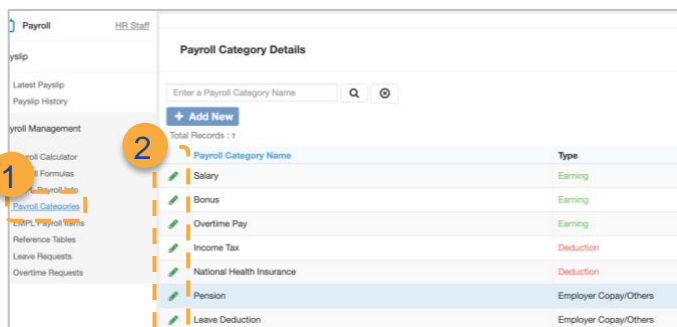
Edit a Payroll Category (Default categories as seen in screenshot).

1 ▸ Click Payroll Categories.

2 ▸ Click the Edit icon.

Update Payroll Category

• Payroll Category Name	Overtime Pay
• Type	Earning
• Taxable	◉ Yes ○ No
Category of Income	None

3 ▸ Fill out necessary fields (* must be filled).

4 ▸ Click Save to finish.

Create a New Payroll Category

5 ▸ Click +Add New.

Payroll Category Name	Type
Salary	Earning
Bonus	Earning
Overtime Pay	Earning
Income Tax	Deduction
National Health Insurance	Deduction
Pension	Employer Copay/Others
Leave Deduction	Employer Copay/Others

New Category Details

• Payroll Category Name	
• Type	Earning
• Taxable	◉ Yes ○ No
Category of Income	None

6 ▸ Fill out necessary fields (* must be filled).

7 ▸ Click Save to finish.

d. Create Payroll Formulas

Now that you have set all the numbers and variables in the Employee Payroll Info and Items, it is time to create the salary equations using these values; this is also the step when you can get the precalculated results before sending the payslips.

Create a New Payroll Formula

Payroll Formula	Pay Category	Equation
Income	Salary (Earning)	($Base Salary + $Supervisory Differential Pay (Level I Supervisors)
Project Bonus	Bonus (Earning)	$Bonus * $Income Tax
Employee Income Tax	Income Tax (Deduction)	($Base Salary + $Supervisory Differential Pay (Level I Supervisors)
Employee Health Insurance	National Health Insurance (Deduction)	$Base Salary * $National Health Insurance
Pension Premium	Pension (Employer Copay/Others)	$Base Salary * $Labor Insurance Employee Premium
Compliance I	Income Tax (Deduction)	$Income * $Government Compliance I
Compliance II	Income Tax (Deduction)	$Base Salary * $Income Tax
Personal Leave	Leave Deduction (Employer Copay/Others)	$Personal Leave(Hour)

1 ▸ Click Payroll Formulas.

2 ▸ Click +Add New.

New Pay Formula Details

· Payroll Formula Name	
· Payroll Category	Please Choose Payroll Category
· Enabled	● Yes ○ No
· First Pay Calculation ⓘ	○ Full Month's Pay' ● Total ○ Void
· Last Pay Calculation ⓘ	○ Full Month's Pay' ● Total ○ Void
· Blank when the value is 0.	● Yes ○ No
· Equation	Enter equation

✔ Save   ⊗ Reset   ‹ Cancel

3 ▸ Fill out necessary fields
(* must be filled).

Equation

Equation

Carry_Over Method [Round up ▾] [Integer only ▾]

Operators

[+] [−] [×] [/] [( )]

EMPL Payroll Items and Payroll Formulas

$Dependents $Labor Insurance Employee Premium

$Supervisory Differential Pay (Level I Supervisors)

$Supervisory Differential Pay (Level II Supervisors) $Food Allowance

$Base Salary $Income Tax $National Health Insurance $Bonus

$Government Compliance I $Government Compliance II $Income

$Project Bonus $Employee Income Tax $Employee Health Insurance

$Pension Premium $Compliance I $Compliance II $Personal Leave

$Overtime Pay $Calendar day $30 calendar days per month

$Leave Days/Hours(Leave Type) ▾ $Overtime Hours ▾

Tentative Calculation

Tentative Calculation [Please select an employee ▾] [Calculate]

Cancel   **Confirming Operations**

a. Click to enter the equation.
- All numbers and variables entered in EMPL Payroll Items and EMPL Payroll Info and the other Payroll Formulas are available for you to put into the equation.
- Operators: Select applicable operators.
- Carry-Over Method: Select the applicable carry-over method.

b. You can input numbers to formulate your equation.

c. Click Tentative Equation Calculation to precalculate the result.

d. Click Confirming Operations and the equation is set.

New Formula Details

· Payroll Formula Name	Holiday Bonus
· Payroll Category	Bonus (Earning)
· Enabled	● Yes ○ No
· First Pay Calculation ⓘ	○ Full Month's Pay' ● Total ○ Void
· Last Pay Calculation ⓘ	○ Full Month's Pay' ● Total ○ Void
· Blank when the value is 0.	● Yes ○ No
· Equation	$Base Salary /4

✔ Save   ⊗ Reset   ‹ Cancel

4 ▸ Click Save to finish.

5 ▸ Click the Edit icon and repeat step 3 and 4 to edit an equation.

🔔

- ➲ Because Payroll Formulas are integral for salary calculation, they cannot be deleted to avoid inconsistencies, but you can refer to STEP 3-a-3^e to omit the ones that are not useful.
- ➲ You must reload the Payroll Formulas listed in STEP 3-a-3^c if there are any changes to the formulas.

🔔

About displaying employee leave hours on their payslips.
- ➲ Based on STEP 2-c, you need to create a corresponding Payroll Category with an Employee Copay/Others type, and then it will show up on the payslips for employees' references.
- ➲ Based on STEP 2-d, you then need to create a Payroll Formula using the Payroll Category you created in the last step, and you are done!
- ➲ Repeat the last step for different leave types as needed.

STEP

1
a
b
c
2
a
b
c
d
✅

STEP 3 . Payroll Calculation

Whether it is for monthly salary, daily wage, or seasonal bonus, the Payroll tool utilizes past payroll formulas and payslips to quickly formulate a new payroll. The process cuts down a significant amount of time on an otherwise cumbersome process for the HR and Accounting Departments.

- Payslip Title
- Month
- Pay Period: Corresponds to Pay Adjustment Date in STEP 2-b.
- Auto Notify: How to send payslips.
- Payroll Roster: Salaried employees.
- Select Payroll Formulas.
- Use Payroll Categories to build your payslip.

Payroll Calculator
- Create a new payroll.
- A new payslip title each time.

Settings

Payroll Roster
- Select salaried employees.
- Employee payroll info is displayed.

- This step is needed when leave time and overtime hours are used in the Payroll Formulas.
- Select applicable requests within the pay period.

Leaves & Overtime Hours

Summary Table
- Gross income = Employee Payroll Info & Payroll Formulas.
- Edit (Highlighted in yellow)
  ✓ Batch edit
    Download template > Edit > Upload
  ✓ Single edit
    Double-click to edit any numbers.
- Click Recalculate to undo the changes.

- Last chance to edit before sending payslips.
- Review EMPL Payroll Info.

Verify

Send, Withdraw Payslip
- Download payroll summary
- Send payslips, employees notified
- Withdraw payslips

▲ Image STEP 3. Payroll Calculator Process

Now that you know how the Payroll Calculator works, you can follow the steps below and start creating your team's first payslips with Payroll!

a.Create Payslips: Payroll Calculator

Before we begin, be sure that you are the HR Staff of Payroll to use the Payroll

Calculator as described in STEP 1-c Set Tool Role.

To sum up, employee payslips are created using the numbers and variables set in the Employee Payroll Info and substituted in the Payroll Formulas to come up with various numbers. The steps in creating a payroll are the initial payslip settings, verifying the payroll roster, calculating unpaid leaves, calculating overtime pay, verifying preliminary results, then sending the payslips to employees. You can use Payroll to create multiple payslips each month for salaries, wages, and bonuses. Payroll is that versatile!
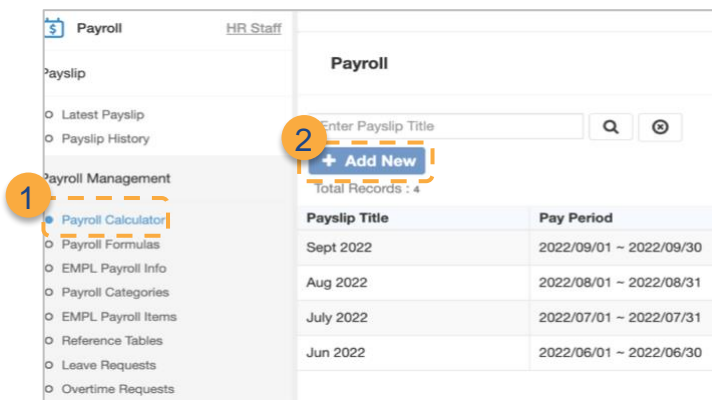
Create a Payslip

1 ▸ Click Payroll Calculator.

2 ▸ Click + Add New.

i View the Payslip progress bar.

3 **Payroll Settings.**
   ▸ Fill out necessary fields (* must be filled).
   a. Pay Period, Auto Notify, Payroll Roster.
   b. Select a Past Payslip to save time if you create a similar one.
   c. Use STEP 2-d Set Payroll Formulas to edit formulas then reload to update.
   d. Add & delete Payroll Categories.

e. Select applicable Payroll Formulas that will be used for this payslip.

f. Click Confirm to close the window.

4 ▸ Add categories, if necessary.
   a. Create a Category.

   b. Input a category name.
   c. Click Confirm to finish.

5 ▸ Manage Payroll Categories and Payroll Formulas.
   a. Sort: Drag and drop to sort.
   b. Edit: Click the Edit icon to change the category name.
   c. Delete: Click the Delete icon to remove unused Payroll Categories and Payroll Formulas.

▸ Click Save to store payslip information and enter the **detail Employee Payroll Info page**.

a. The On Board Date and Termination Date must fall within the Pay Period.

b. Verify the numbers[2].

c. Click Reload to update the numbers if there are changes to EMPL Payroll Info or EMPL Payroll Items.

▸ Continue to Step 8 if overtime work and leaves factor in the calculation. Else skip to Step 14.

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[2] No Termination Date means the employee is listed as Resigned in the employee profile and without a specified Termination Date to calculate the last paycheck. Please refer to this FAQ to update employee resignation information.

Select Leaves Outside of the Pay Period

Status	Leave Request ID	Leave Type	Employee Name	Leave Duration	Request Status	Leave Time
Non-use	LR22080002	Personal Leave	Eron	8 hours	Approved	2022-08-10 Wed

Cancel Select

Select leave requests to calculate the deductible amount.

i ▸ Click to return to last step.

8 ▸ Determine Leave Hours: This step becomes available if you input leave hours into a payroll formula, and the leave requests within the pay period will be listed.
   a. Request Selection: Select applicable requests.
   b. Click Reselect if needed.

9 ▸ Select Leaves Outside of the Pay Period if needed. Else skip to Step 10.
   a. Use the filters to search for leave requests.
   b. Select the applicable requests.

10 Click to proceed to the next step.

Settings ＞ Payroll ＞ Select from Leave Pro Leaves ＞ Select from Overtime requests ＞ Summary Table

← Select from Overtime requests

→ Calculate

Payslip Title	Sept 2022
Pay Period	2022-09-01~2022-09-30

Reselect

Overtime requests outside of the pay period

Select Cancel

Total Records : 4

100 ▾ Records/Page ⏮ ◀ 1 / 1 ▶ ⏭

	Status	Overtime Request ID	Compensation	Employee Name	OT Duration	Status	OT Time	Staus change within the pay period
☐	Use	OT22080002	Compensatory Leave	Eron	2 hours	Approved	2022-09-14 Wed 18:00 ~ 20:00	
☐	Use	OT22080003	Compensatory Leave	Eron	3.5 hours	Approved	2022-09-21 Wed 18:00 ~ 21:30	
☐	Use	OT22080004	Overtime Pay	Delores	3 hours	Approved	2022-09-23 Fri 18:00 ~ 21:00	
☐	Use	OT22080006	Compensatory Leave	Joyce	1.5 hours	Approved	2022-09-23 Fri 18:00 ~ 19:30	

		Overtime requests outside of the pay period					

Status ▾	Compensation ▾	Overtime Request Il	2022-07-01 🗓	2022-09-30 🗓	🔍	⊗

☐	Status	Overtime Request ID	Compensation	Employee Name	OT Duration	Status	OT Time
☐	Non-use	OT22080001	Compensatory Leave	Eron	0.5 hour	Approved	2022-08-23 Tue 18:00 ~ 18:30
☐	Non-use	OT22080005	Compensatory Leave	Joyce	0.5 hour	Approved	2022-08-23 Tue 18:00 ~ 18:30

Cancel | Select

Select overtime hours to calculate compensational pay.

i ▸ Click to return to last step.

11 ▸ Determine Overtime Hours: This step becomes available when you have inputted overtime hours into a payroll formula, and the submitted overtime requests within the pay period will be listed.

    a. Request Selection: Select applicable requests.

    b. Click Reselect if needed.

12 ▸ Select Overtime Requests Outside of the Pay Period if needed. Else skip to Step 13.

    a. Use the filters to search for overtime requests.

    b. Select the applicable requests.

    c. Select the overtime requests and clock the window.

13 ▸ Click Calculate to begin payroll calculation.

← **Summary Table**

→ Confirm

| Payslip Title | Sept 2022 |
| Pay Period | 2022-09-01~2022-09-30 |

Download Latest Template **Import**

Recalculate

Employee Basic Information			Fixed Pay	Bonuses		Compensations	Taxes & Insurances	
ID	Name	Department	Gross Income	Project Bonus	Holiday Bonus	Overtime Pay	Employee Income Tax	Employee Health Insurance
1101	Delores	Executive	5,900	0	950	428	295	236
1102	Eron	Marketing	7,400	200	1,250	1,032	370	296
1103	Joyce	Human Resources	7,800	0	1,500	338	390	312
1104	Rick	Research & Development	8,650	0	1,500	0	433	346

Review employee payroll results.

i ▸ Click to return to last step.

14 ▸ Manual Edit: Manually edit numbers (highlighted) and the Take-Home Pay will be automatically updated.

a. Batch Edit: Click Download Latest Template to edit the numbers and import the file back to the system.

b. Online Edit: Double click to edit.

● When updating numbers that are categorized as References, you will be asked whether to recalculate formulas that use these reference categories.

● If editing is required, it is recommended that you update the Reference Payroll Categories first to avoid miscalculations.

15 ▸ Click Recalculate to undo the changes and redo the payroll calculation. Else, click Confirm.

16 ▸ Click Confirm to save the payroll and return to the Payroll Calculator screen. Hang tight, you are almost done!

b.Edit Payrolls

After the payroll is completed, you can still redo it and make the necessary corrections if there are any calculation errors, so long you have not sent the payslips to employees[3]. And every time you recalculate a payroll, you will be asked to begin the process from STEP 3-a anew.

1 ▸ Click Payroll Calculator.

2 ▸ Select a payroll to recalculate.

3 ▸ Click Recalculate and continue from STEP 3-a-3.

c.Download Payroll Report

The payroll report can be downloaded for perusal or record keeping; this can be useful for the HR and Accounting Department. And for companies that require Managers' approval before sending out payslips, you can download the payroll reports and use the Approvals tool to obtain the go-ahead.

The Download button becomes available when payroll calculation is finished, and you

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[3]Payroll Details – Status

Editing: All values can still be edited.

x/n: n=total salaried employees, x=employees whose payslips are sent.

can tell by looking at the payslip status.
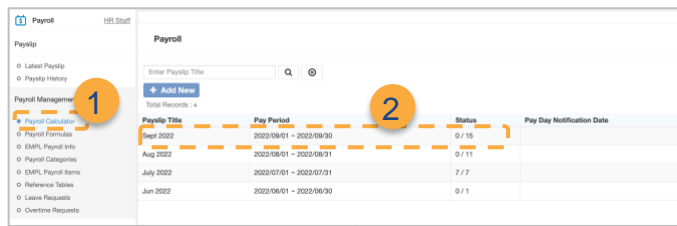
1 ▸ Click Payroll Calculator.

2 ▸ Select a finished payroll.
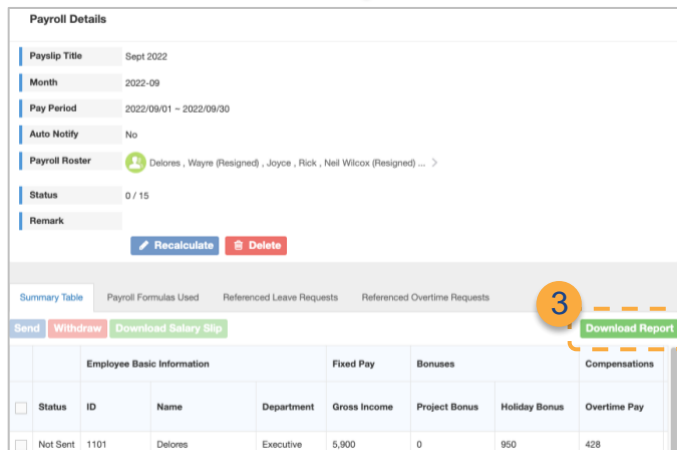
3 ▸ Click the Summary Table tab and the Download Report is shown on the right of the screen. Click to download the payroll report.

d.Send Online Payslips to Employees

One of the more sought-after features of the Payroll tool is sending online payslips to employees so they can review their payslips anywhere, anytime. Of course, this sensitive information is protected by each employer's login password.

Briefly mentioned in STEP 3-a-3a, the Payroll HR Staff can either manually or automatically send employee payslips. Simply set a time for sending employee payslips, or manually send them when you are ready.
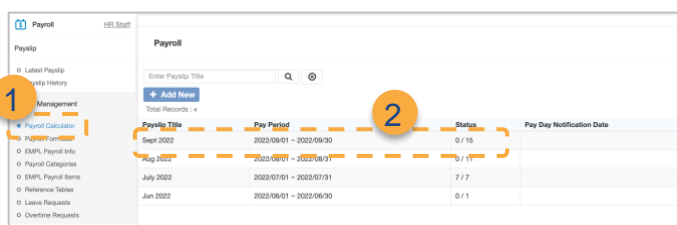
1 ▸ Click Payroll Calculator.

2 ▸ Select a completed payroll.

3 ▸ Auto Notify
   a. Select Yes and set a time to
      auto send payslips. Select No
      to manually send payslips.
   b. Select employees.
   c. Click Send to immediately
      send payslips to selected
      employees.

4 ▸ Payroll Status shows how many
   payslips are sent.

e.Withdraw Employee Payslips

The Payroll HR Staff can withdraw sent payslips if there are errors. And when sent payslips are withdrawn, the recalculate function becomes available again.

1 ▸ Click Payroll Calculator.

2 ▸ Click on a payslip to withdraw.

3 ▸ Withdraw
   a. Select employees to withdraw their payslips.
   b. Click Withdraw to retract sent payslips.

🔔

Trial Run

Upon initial implementation, it is recommended that you send a payslip to yourself, make necessary changes, and verify whether all payroll items and numbers are correct before sending it to all the employees.

f.Download Employee Payslips

Much like downloading the payroll report, you can also download employee payslips individually for record-keeping if required.

1 ▸ Click Payroll Calculator.

2 ▸ Select a finished payroll.

3 ▸ Download payslip.

   a. Click the Summary Table tab and select employees.

   b. Click Download Payslip to download employee's payslips in PDF format.

g.Employees: View / Download Current Payslip

With the Payroll tool, every employee could view their payslip via a PC or smartphone. And their payslip is protected with their login password. Simply click the notification to view your latest payslip!
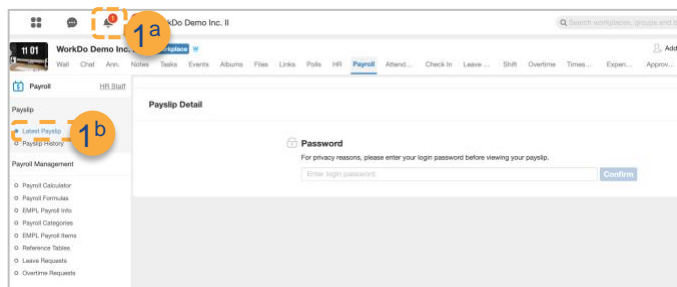
1 ▸ View Current Payslip

   a. Click the Notification Center.

   b. Click on the payslip notification.

2 ▸ Enter your login password. Please see this FAQ if you did not set a login password.

3 ▸ Click Confirm to view the latest payslip.

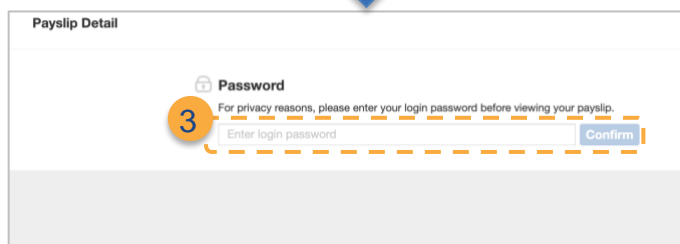4 ▸ The PDF format of the payslip is available for print.

h.Employees: View / Download Historical Payslips

Payslip History offers each employee the ability to view past payslips.
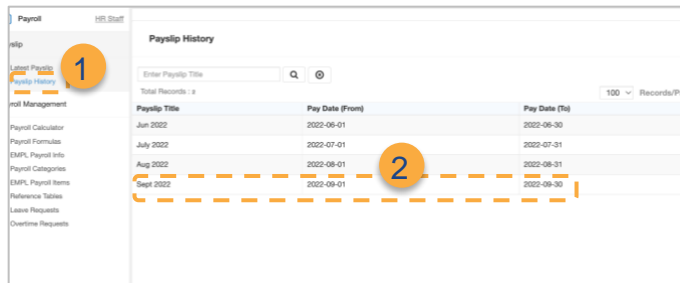
1. ▶ Click Payslip History.

2. ▶ Select a payslip to view or print.

3. ▶ Enter your login password to view the payslip.

4. ▶ The PDF format of the payslip is available for print.