For more information, see Help > Contents > Employees.

Setting up employees

Goal: Set up your employees in Ajera so you can process time, expenses, and payroll for them.

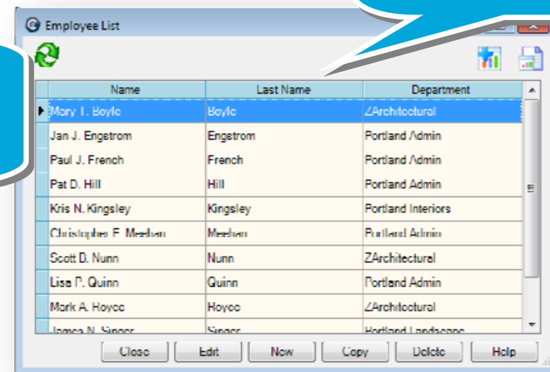
In this quick lesson

Step 1: Enter general information

1. Select **Setup** > **Employees**.

As you set up employees, they appear in this Employee List window.

Plan to set up employees who will review and approve timesheets first so they are available for you to select as supervisors when you set up other employees later.

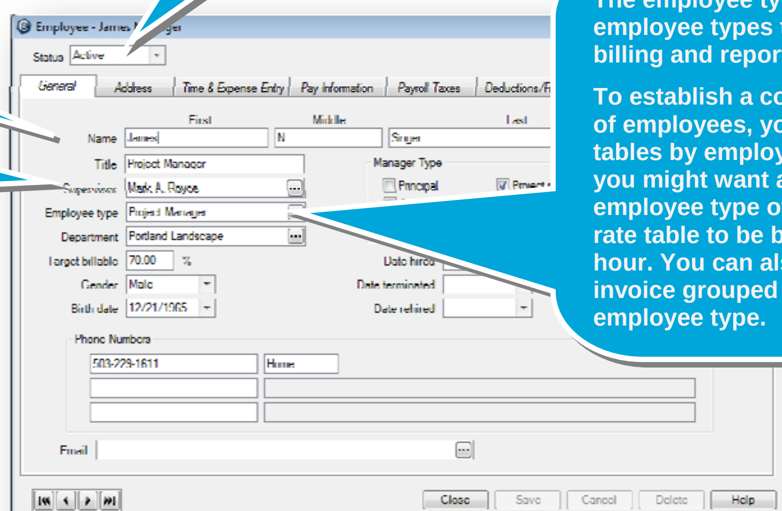


2. Click the **New** button.
3. Begin by entering some general information about the employee.

Enter the employee's name and job title. Note that they print on client invoices.

Leave the status as Active.

If a supervisor reviews and approves the employee's timesheet, enter the employee's supervisor.



The employee type is required. You use employee types to group employees for billing and reporting.

To establish a common rate for a group of employees, you can set up rate tables by employee type. For example, you might want all employees with an employee type of Drafter on a specific rate table to be billed out at $65.00 per hour. You can also choose to print an invoice grouped or summarized by employee type.

Step 1: Enter general information (continued)

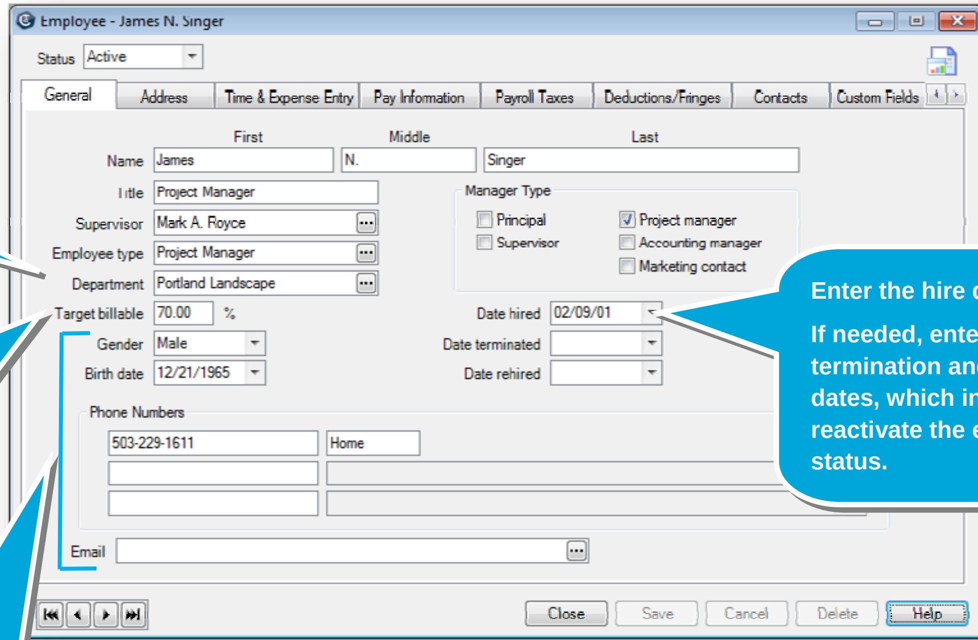
4. Continue entering general information about the employee.

For ajeraComplete or the Departments add-on only.

The Department field appears only if you selected to use departments in Company > Preferences.

Enter the employee's billable target as a percent if you want to override the target billable percent set up for the employee's employee type.

Target billable percent is used on employee utilization reports.



Enter the hire date.

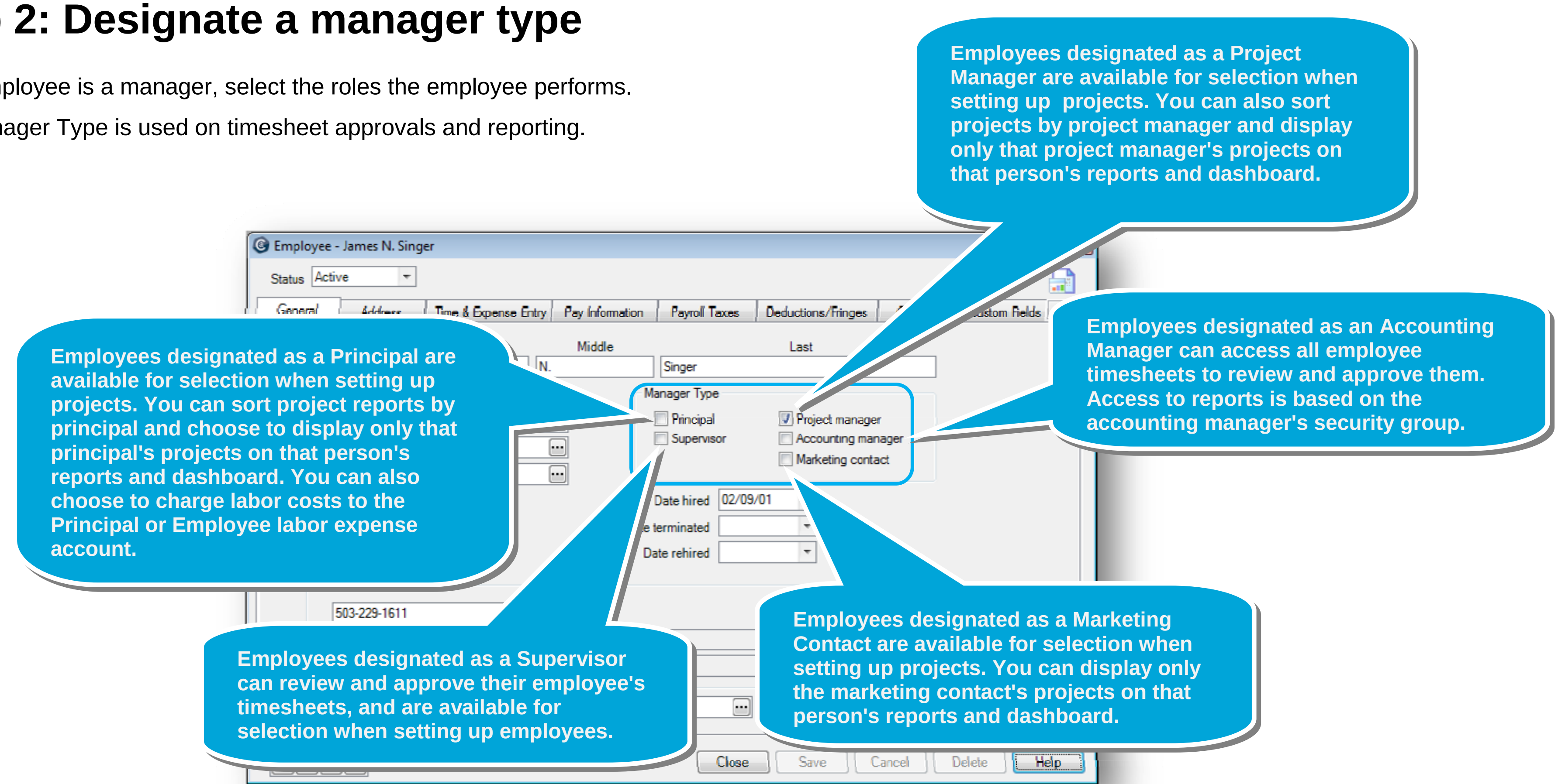
If needed, enter the termination and rehire dates, which inactivate and reactivate the employee status.

Complete other general information.

Step 2: Designate a manager type

If the employee is a manager, select the roles the employee performs.

The Manager Type is used on timesheet approvals and reporting.

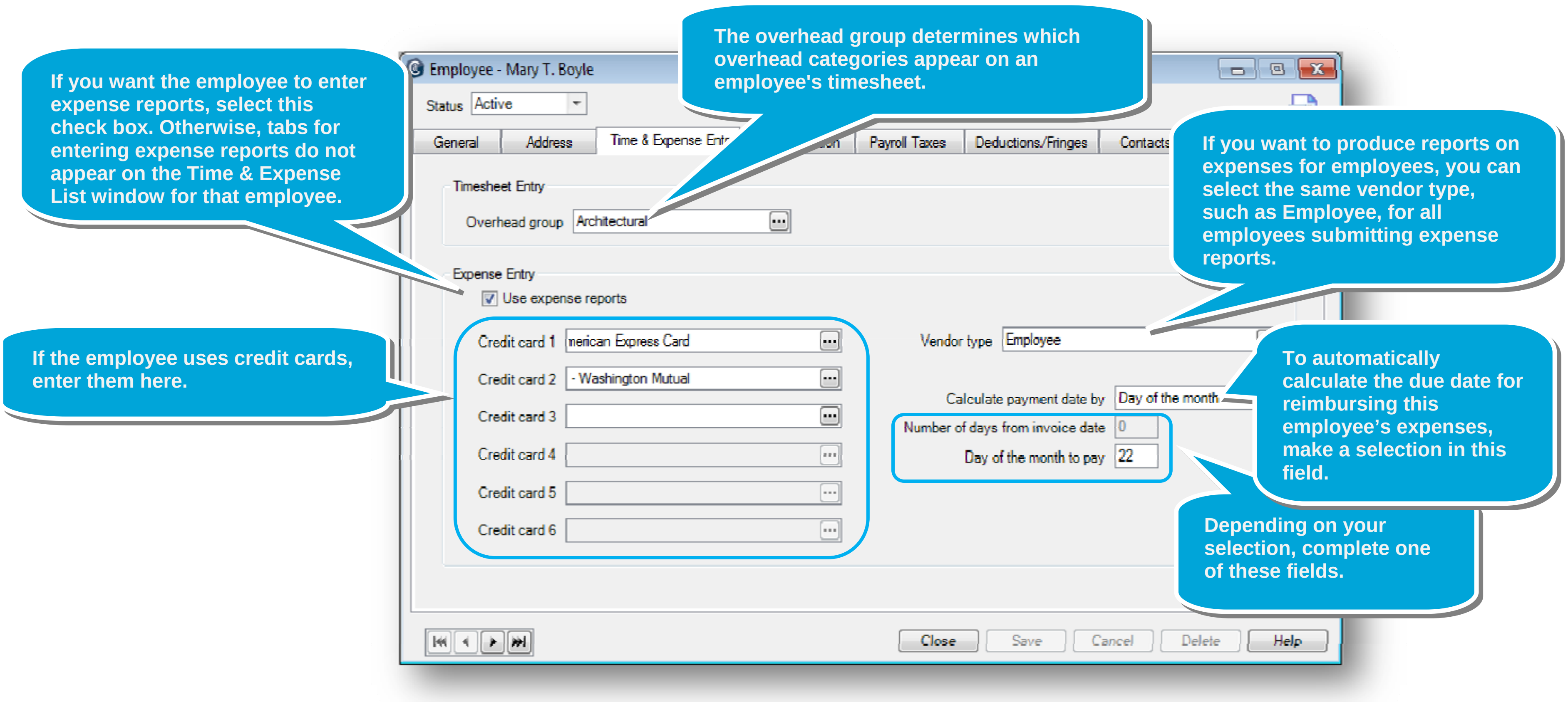


Step 3: Enter address and contact information

1. Click the **Address** tab and enter the employee's address.
2. Click the **Contacts** tab and enter any emergency contacts for the employee.

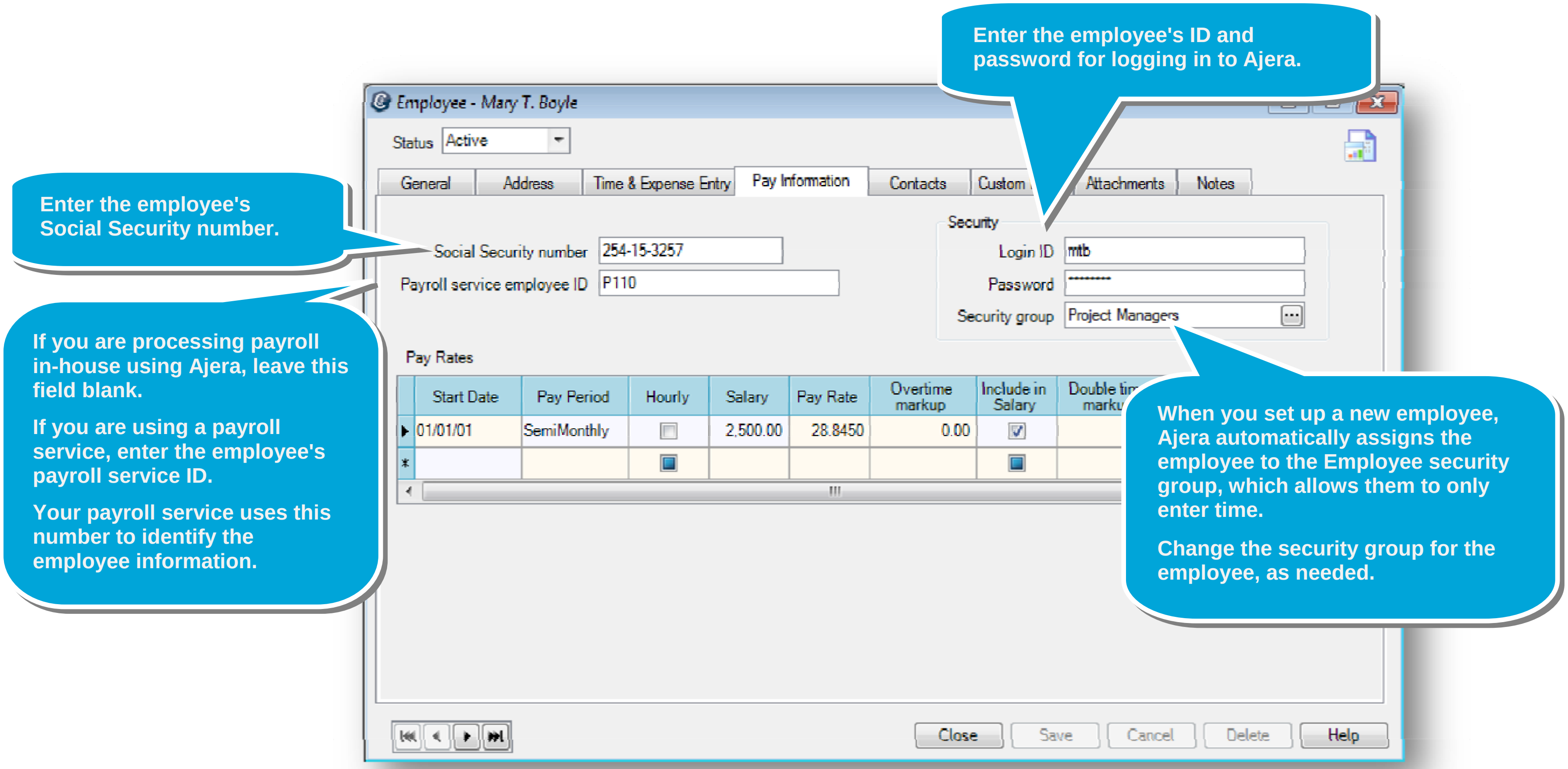
Step 4: Set up time and expenses

Click the **Time & Expense Entry** tab to specify overhead and expense report settings.



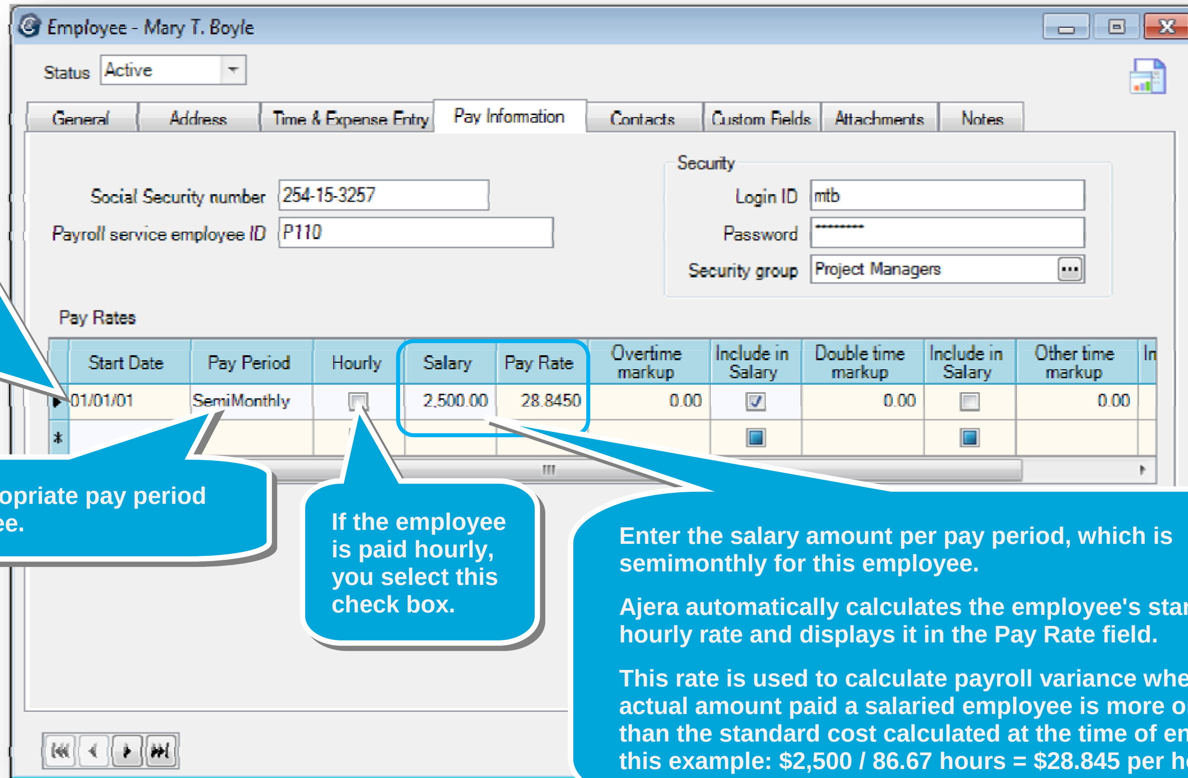
Step 5: Set up pay information

1. Click the **Pay Information** tab.
2. Enter general information for the employee.



Step 5: Set up pay information (continued)

3. Enter the employee's pay rate.



On the first row of the table, skip this field because you are entering the employee's first pay rate. To establish a starting (default) pay rate, Ajera automatically enters a Start Date of 01/01/01, which you cannot change.

When you later enter pay rate changes on subsequent rows of the table, you then enter the start (effective) date for each pay change.

Select the appropriate pay period for the employee.

If the employee is paid hourly, you select this check box.

Enter the salary amount per pay period, which is semimonthly for this employee.

Ajera automatically calculates the employee's standard hourly rate and displays it in the Pay Rate field.

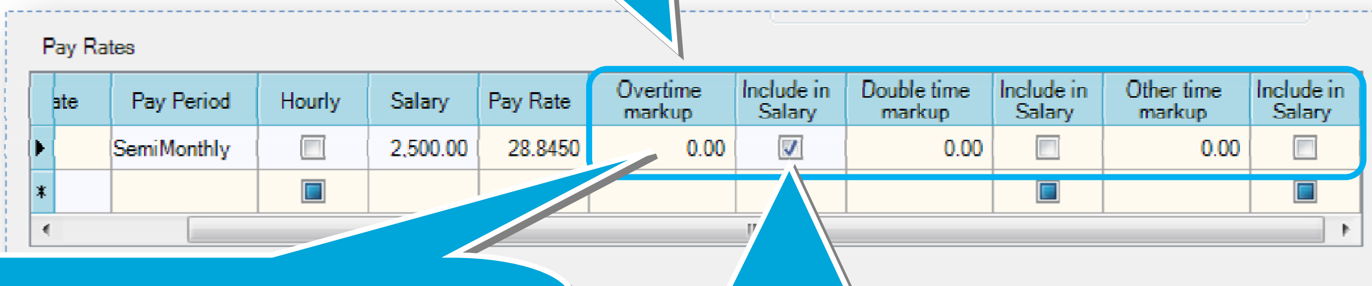
This rate is used to calculate payroll variance when the actual amount paid a salaried employee is more or less than the standard cost calculated at the time of entry. In this example: $2,500 / 86.67 hours = $28.845 per hour.

Step 5: Set up pay information (continued)

4. Enter information to define premium pay (such as overtime or double time).

The premium pay options that appear are based on options you set in Company > Preferences.

If this employee receives any premium pay, you would specify the markup percent.



To pay overtime at the regular pay rate, you would leave the markup percent as zero.

To pay overtime by marking it up, you would enter the percent you want to mark up the regular rate. For example, if this employee were paid time and a half for overtime hours, you would enter 50.00.

Because this employee is salaried and you do not want to pay extra for overtime, you would ensure that the Include in Salary check box is selected.

If you wanted to pay an employee overtime in addition to regular salary, you would clear the Include in Salary check box, which would make the Overtime Markup field available. You would then specify the markup percent.

Step 6: Next step

If you are processing payroll in-house using Ajera, to finish setting up the employee, see the quick lesson, *Setting up employees for in-house payroll*.

If you are outsourcing payroll using a payroll service, you are finished setting up the employee. As always, be sure to save your work.