

Setting up employees

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

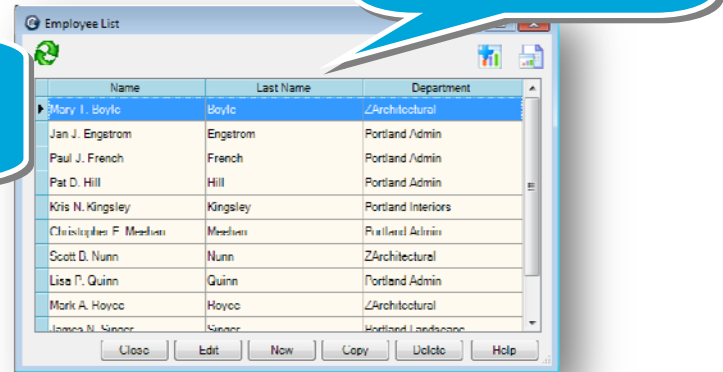
In this quick lesson

Step 1: Enter general information	2
Step 2: Designate a manager type	4
Step 3: Enter address and contact information	5
Step 4: Set up time and expenses	5
Step 5: Set up pay information	6
Step 6: Next step	9

Step 1: Enter general information

1. Select **Setup > Employees**.

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.

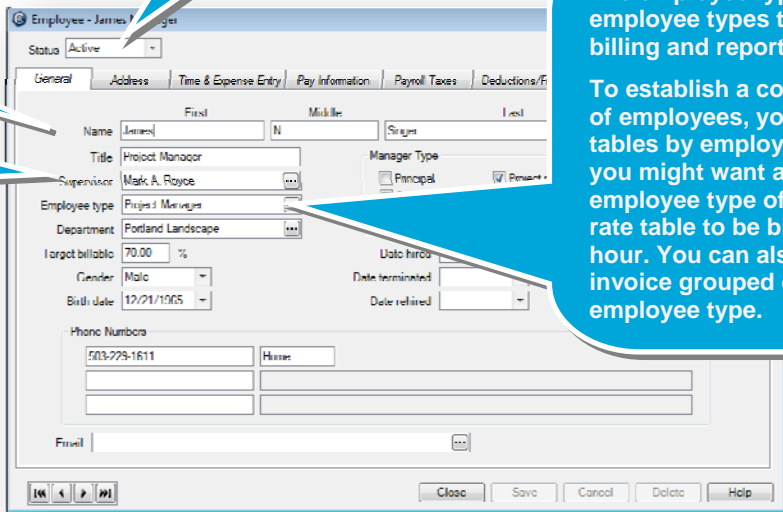


2. Click the **New** button.
3. Begin by entering some general information about the employee.

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)

- Continue entering general information about the employee.

The screenshot shows the 'Employee - James N. Singer' form with the following fields and callouts:

- Callout 1:** For ajeraComplete or the Departments add-on only. The Department field appears only if you selected to use departments in Company > Preferences. (Points to the Department field)
- Callout 2:** 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. (Points to the Target billable field)
- Callout 3:** Complete other general information. (Points to the bottom section of the form)
- Callout 4:** Enter the hire date. If needed, enter the termination and rehire dates, which inactivate and reactivate the employee status. (Points to the Date hired, Date terminated, and Date rehire fields)

The form fields include: Status (Active), Name (James N. Singer), Title (Project Manager), Supervisor (Mark A. Royce), Employee type (Project Manager), Department (Portland Landscape), Target billable (70.00%), Gender (Male), Birth date (12/21/1965), Date hired (02/09/01), Date terminated, Date rehire, Phone Numbers (503-229-1611 Home), and Email.

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.

The screenshot shows the 'Employee - James N. Singer' form. The 'Manager Type' section has four checkboxes: 'Principal' (unchecked), 'Supervisor' (unchecked), 'Project manager' (checked), and 'Accounting manager' (unchecked). Below this are fields for 'Date hired' (02/09/01), 'Date terminated', and 'Date rehired'. The form also shows 'Middle' (N.) and 'Last' (Singer) name fields, and a phone number '503-229-1611'. At the bottom are 'Close', 'Save', 'Cancel', 'Delete', and 'Help' buttons.

Employees designated as a Principal are available for selection when setting up projects. You can sort project reports by principal and choose to display only that principal's projects on that person's reports and dashboard. You can also choose to charge labor costs to the Principal or Employee labor expense account.

Employees designated as a Supervisor can review and approve their employee's timesheets, and are available for selection when setting up employees.

Employees designated as a Project Manager are available for selection when setting up projects. You can also sort projects by project manager and display only that project manager's projects on that person's reports and dashboard.

Employees designated as an Accounting Manager can access all employee timesheets to review and approve them. Access to reports is based on the accounting manager's security group.

Employees designated as a Marketing Contact are available for selection when setting up projects. You can display only the marketing contact's projects on that person's reports and dashboard.

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.

The screenshot shows the 'Employee - Mary T. Boyle' form with the 'Time & Expense Entry' tab selected. The form is divided into several sections:

- Timesheet Entry:** Includes an 'Overhead group' dropdown menu currently set to 'Architectural'.
- Expense Entry:** Includes a checked 'Use expense reports' checkbox and six 'Credit card' fields (Credit card 1 through 6). Credit card 1 is 'American Express Card' and credit card 2 is '- Washington Mutual'.
- Vendor type:** A dropdown menu set to 'Employee'.
- Calculate payment date by:** A dropdown menu set to 'Day of the month'.
- Number of days from invoice date:** A text input field with the value '0'.
- Day of the month to pay:** A text input field with the value '22'.

Callouts provide the following information:

- Overhead group:** The overhead group determines which overhead categories appear on an employee's timesheet.
- Use expense reports:** If you want the employee to enter expense reports, select this check box. Otherwise, tabs for entering expense reports do not appear on the Time & Expense List window for that employee.
- Credit cards:** If the employee uses credit cards, enter them here.
- Vendor type:** If you want to produce reports on expenses for employees, you can select the same vendor type, such as Employee, for all employees submitting expense reports.
- Payment date calculation:** To automatically calculate the due date for reimbursing this employee's expenses, make a selection in this field.
- Payment date fields:** Depending on your selection, complete one of these fields.

Step 5: Set up pay information

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

Enter the employee's Social Security number.

Enter the employee's ID and password for logging in to Ajera.

If you are processing payroll in-house using Ajera, leave this field blank.
If you are using a payroll service, enter the employee's payroll service ID.
Your payroll service uses this number to identify the employee information.

When you set up a new employee, Ajera automatically assigns the employee to the Employee security group, which allows them to only enter time.
Change the security group for the employee, as needed.

Employee - Mary T. Boyle

Status: Active

General | Address | Time & Expense Entry | **Pay Information** | Contacts | Custom | Attachments | Notes

Social Security number: 254-15-3257

Payroll service employee ID: P110

Security

Login ID: mtb

Password: *****

Security group: Project Managers

Pay Rates

	Start Date	Pay Period	Hourly	Salary	Pay Rate	Overtime markup	Include in Salary	Double time markup
▶	01/01/01	SemiMonthly	<input type="checkbox"/>	2,500.00	28.8450	0.00	<input checked="" type="checkbox"/>	
*			<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	

Close Save Cancel Delete Help

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 \text{ hours} = \28.845 per hour .

Employee - Mary T. Boyle

Status: Active

General | Address | Time & Expense Entry | **Pay Information** | Contacts | Custom Fields | Attachments | Notes

Social Security number: 254-15-3257

Payroll service employee ID: P110

Security: Login ID: mtb, Password: [redacted], Security group: Project Managers

Start Date	Pay Period	Hourly	Salary	Pay Rate	Overtime markup	Include in Salary	Double time markup	Include in Salary	Other time markup
01/01/01	SemiMonthly	<input type="checkbox"/>	2,500.00	28.8450	0.00	<input checked="" type="checkbox"/>	0.00	<input type="checkbox"/>	0.00

Step 5: Set up pay information (continued)

- 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.

Rate	Pay Period	Hourly	Salary	Pay Rate	Overtime markup	Include in Salary	Double time markup	Include in Salary	Other time markup	Include in Salary
▶	SemiMonthly	<input type="checkbox"/>	2,500.00	28,845.00	0.00	<input checked="" type="checkbox"/>	0.00	<input type="checkbox"/>	0.00	<input type="checkbox"/>
*		<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

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.