TEAM FINANCIAL MANAGEMENT SYSTEMS, INC.

WinTeam 4.4.xxx Release Notes

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What's New in WinTeam 4.4.xxx?

This version of WinTeam was released 06/29/07.

TEAM occasionally provides newer program files that are not considered major releases.

To view the updates that have been made since this release, see

- WinTeam Version History 4.4.008 to 4.4.010
- WinTeam Version History 4.4.006 to 4.4.008
- WinTeam Version History 4.4.005 to 4.4.006
- WinTeam Version History 4.4.004 to 4.4.005
- WinTeam Version History 4.4.003 to 4.4.004
- WinTeam Version History 4.4.002 to 4.4.003

When you see this icon in these notes, or anywhere within the WinTeam Help program, it indicates that a short video clip is available to explain the feature or changes.

SPECIAL NOTE WHEN UPDATING TO VERSION 4.4.xxx FROM 4.3.xxx OF WINTEAM

Manual changes are needed to accommodate the
2007 law changes for the EEOC Report.

Defaults, System, and Security

- WinTeam 5.0 Preview

- **New Visual Design**

  You'll notice we have incorporated a new look into parts of WinTeam, as well as some design changes. We have enhanced grid functionality and Quick Lookups, making it easier to select and identify records, yet keeping the same workflow. So if you are a longtime user, rest assured that the familiar options are still there, plus some great new ones to make you even more efficient at performing your daily tasks with WinTeam. The following screens take on the new look and functionality:

  - Fixed Asset Defaults

  - Group Security

  - Fixed Assets Master File

  - Fixed Asset Categories

- Multiple Job Allocation per Asset

- Depreciation Details

- Fixed Asset add\edit lists included Asset Types, Asset Manufacturers, Tax Life Types, Personal Property Types, Personal Property Jurisdictions, Change History, and Repair / Maintenance Types

- Quick Lookups include Lookup Assets, GL Accounts, AP Invoices, Employees, Jobs, and Vendors

- Custom Field Setup

- **Enhanced export ability for reports using Crystal Reports 11**

  Added editable RTF (Microsoft Word) exporting option to reports

- **New toolbar images for reports toolbar**

- **WinTeam Reports are now using the most current version of Crystal Reports**

  - corrected format issue on 2nd page of AR Invoice Print

  - corrected Excel 8.0 format errors

  - resolved issue where WinTeamP.exe error was occurring on the GL Chart of Accounts Transaction Detail quickie report

  - resolved issue where the TeamTime Hours vs. Scheduling Hours Report was not creating an export file for MS Word

- **Stricter controls added to Pay Defaults**

  The First Day of the Pay Week can no longer be changed if there are Personnel Scheduling Job Posts set up due to the issues that result in Schedules when this is done. A message will now display to call TEAM for assistance in performing this task.

  For more information, see Payroll Defaults in the WinTeam Help program.

- **Enabled the Job Quick Lookup in the Customer Balance Posting screen**

  Enabled the Job Quick Lookup in each grid row of the Customer Balance Posting screen.

  For more information, see Customer Balance Posting in the WinTeam Help program.

- **Added new option to the Overtime Method Wizard in Payroll Defaults**

  Added a new check box to the Weekly Hours screen that allows you to identify a custom Overtime Method as being exempt from weighted averaging. This will always default as False. This option allows a company to indicate a specific group of employees as exempt from Weighted Averaging.

  For more information, see Payroll Defaults or Learning about Overtime Methods in the WinTeam Help program.

- **Added option to Fixed Asset Defaults to require the Vendor and Invoice Numbers when adding new asset records**

  New check box added to "Require Vendor and Invoice Numbers". If this check box is selected, in the FA: Master File screen the font on the Vendor Name and Invoice Numbers labels will be bold, maroon text indicating required fields.

  For more information, see FA: Defaults in the WinTeam Help program.

Accounts Payable

- **Added functionality to default the Payment Method to Credit Card**

  Added Custom Setting to default the Payment Method to Credit Card when importing AP Invoices.

Section	Item	Value
APInvoices	CCAlways	Yes

  For more information, see Vendor Invoices in the WinTeam Help program.

Accounts Payable Reports

- **Added a Posting Date range to the Category/Records area on the Use Tax Due Report**

  Added a Posting Date range to the Category/Records area in order to limit the Invoices picked up by a Posting Date range. Since there could be Payments that are marked as Use Tax Due (applied to Expenses), these will also be picked up if the Check Date is within the Posting Date range entered.

  For more information, see Use Tax Due Report in the WinTeam Help program.

- **New ARP format for Bank One**

  For more information, see AP NACHA Bank Transmission Report in the WinTeam Help program.

- **Added the "Show Report Criteria" check box to Accounts Payable Reports**

AP NACHA Bank Transmission, Cash Requirements, Check Register, Purchase Order, Use Tax Due, Vendor Activity, Vendor Aging Analysis, and Vendor Master.

For more information, see each report in the WinTeam Help program.

Accounts Receivable

- **Added option to sort by Job Number when printing invoices**

  For more information, see Print Invoices in the WinTeam Help program.

Accounts Receivable Reports

- **Added Last Payment Amount to the AR Invoice Aging Report**

  Last Payment Amount has been added to the right of Last Payment Date.

  For more information, see Invoice Aging Report in the WinTeam Help program.

- **Added option to the AR Invoice Aging Report**

  Added option to Suppress Customer Details. For more information, see Invoice Aging Report in the WinTeam Help program.

- **Added the "Show Report Criteria" check box to AR Reports**

  Added the "Show Report Criteria" check box to the Cash Posting Report, Customer Activities Reports, Customer Master Report, Customer Sales Trend Report, Invoice Aging Report, Invoice Register Report, Revenue by Sales Rep Report, and the Sales Tax Report.

  For more information, see each report in the WinTeam Help program.

Fixed Assets


Fixed Assets 5.0 - This video highlights features contained in the Fixed Assets module.

- **Added features to the Asset Master File screen**

  - Added Primary Lookup field for Assets

  - Added Change Info icon. If you hover over the Change Information icon you will see the User Added, Date Added, User Changed, and Date Changed information.

  - Added a Depreciable check box. This will default to unchecked for new records. All current records will have this check box selected during the auto update process.

  - Added tabs to the Asset Master File screen. There is now a General tab, Custom Fields tab, and Repairs / Maintenance tab.

- Added 20 more Custom Fields. The new Custom Field tab now has 26 Custom Fields available.

- Changed label of the Primary Job field to Primary Depr. Job. This change should make it clearer as to its purpose since we are now going to have 2 Job fields.

- Moved the Cost field from the Depreciation area of the screen since it can now be used for both depreciable and non-depreciable assets.

- Added referential integrity to the Invoice Number and Vendor Number fields. Prior to this release, you could type in any Vendor or Invoice Number without the Vendor or Invoice record existing in WinTeam. You can use the Quick Lookup feature to locate existing Vendor Numbers or Invoice Numbers. You can also double-click in the Vendor Name field to open the corresponding Vendor Master File record. During the Auto Update process, if there was information in these fields, it will be handled as follows: The old Vendor Name and Vendor Invoice number that were there previously will be written to Custom Field 7 (Vendor Name) and Custom Field 8 (Old Invoice #). We will attempt to find a matching Vendor Name in the Vendor master file and will write this number into the Vendor Number field. If there was an invoice number in the field, we will check to see if it matches an invoice for the Vendor Number, and if so, we will leave the number in the invoice number field. Regardless of whether there was data that could be saved, the old information will be available for viewing in the Custom Fields for each asset.

- Added "Date Retired" field to use to indicate if a piece of equipment (whether depreciable or non-depreciable) is no longer in use. It may not be disposed yet, so you can have an item that is retired and not yet disposed. Once you dispose of an item though, if there is no Date Retired, the Date Disposed will be used for the Date Retired.

- **Added the ability to set up and track non-depreciable assets**

  With this added functionality you can run equipment related reports for a specific Job(s). In previous versions, the Fixed Asset Reports included only depreciable assets.

  For more information, see FA: Master File in the WinTeam Help program.

- **Security changes made for the FA: Asset Master File screen**

  - Added new security features to the FA: Master File screen in order to restrict users Security on this screen. You will need to set up custom groups and select the appropriate security features for your custom group. If multiple features are selected for a security group the one that gives the least security will "win".

- Added "Job Assignment and Repair History Only" screen features to allow access to:

- Change the Job Assignment grid
- Change the Repairs / Maintenance grid
- Change the Out of Service check box
- Change the Date Retired field.

With this feature, the User cannot change any other information on the asset record other than what is stated.

- Added "Deny Depreciable Changes" screen feature to allow:

- Can Add, Change, Delete non-depreciable assets
- Can NOT Add, Change, Delete Depreciable assets with the exception of the Job Assignment and Repair/Maintenance history.

Can also change the Out of Service and Date Retired fields for any asset.

- Added FA Read Only Security Group which grants read only access to the FA: Master and FA: Depreciation Detail screens.

- **Added feature to track the Job Assignment History of an asset**

  You now can track the Job's equipment inventory without having to change the Primary Depreciation Job. This gives you the ability to depreciate equipment under one Job, but show the equipment as part of another Job's inventory. You will also be able to track where a piece of equipment had been previously. With this history, some of the reports become more powerful since they will now be more date sensitive.

  For more information, see FA: Master File in the WinTeam Help program.

- **Added functionality to track maintenance and repairs on equipment**

  Now you can track the maintenance and repairs performed on equipment. In addition, you can run the new Repair and Maintenance Report to review work that has been done.

  For more information, see FA: Master File and the Repair and Maintenance Report in the WinTeam Help program.

- **Added an Out of Service check box to the FA: Master File (Repairs/Maintenance tab)**

  This can be used to indicate if an item is removed from service. An item can be removed from service (being repaired, down for maintenance, etc.) but still be assigned to a Job. You can use this check box for whatever processes your company may have to sort, filter, and report on Assets.

- **Added Repair / Maintenance Types add\edit list**

  Added Repair / Maintenance Types add\edit list for use on the FA: Master File (Repairs / Maintenance tab).

Fixed Asset Reports

- **Changes made to all Fixed Asset Reports to accommodate for the above new features**

- **Added tier-based functionality to all Fixed Asset Reports**

- **Added the "Show Report Criteria" check box to some FA Reports**

  Schedule of Depreciation and Repair/Maintenance

  For more information, see each report in the WinTeam Help program.

General Ledger

- **Expanded Report Format Details on the GL Reports Template**

  Report Format Details grid has been expanded to allow more lines that can be viewed on this screen.

  For more information, see Formatting of Financial Statements in the WinTeam Help program

- **Change made to G/L Balance on the GL Check Register**

  The GL Check Register screen has now changed when displaying the G/L Balance. If you select a Check Date range of 12 months or less, the G/L Balance will display correctly. (Previously it did not handle year end rollovers correctly and displayed an incorrect Register Balance.) But if you select a date range of 13 months or more, the previous fiscal period will only display $0.00 for the G/L Balance. The current fiscal period will display the G/L Balance for each record.

  For more information, see Register in the WinTeam Help program.

General Ledger Reports

- **Added the "Show Report Criteria" check box to the GL Reports**

  Added the "Show Report Criteria" check box to the Budget Income Statement, Budget Income Statement: Current vs Prior, Chart of Accounts Report, Comparative Income Statement, Financial Report Format, General Ledger Detail Report and the Trend Income Statement.

  For more information, see each report in the WinTeam Help program.

Human Resources

- **Increased the Score value to display a 5-digit value for the Compliance Tracker by Employee**

  Increased the Score value to display a 5-digit value in the Completed grid and on the License/Expiration Code tab grid. This will also display on the Compliance Status report and License/Expiration report.

  For more information, see Compliance Tracker by Employee in the WinTeam Help program.

Human Resources Reports

- **Changes to accommodate the 2007 law changes for the EEOC Report changes**

  The EEO Category Officials and Managers will be divided into two levels based on responsibility and influence within the organization. If you previously had employees assigned to the Officials and Managers EEOC Category, they are now assigned to the Executive/Senior Level Officials and Managers EEOC Category. You should review and make changes as necessary.

  1. Executive/Senior Level Officials and Managers (this replaces the existing Officials and Managers Description).

  2. First/Mid-Level Officials and Managers.

  National Origin also has changes that will need to be manually made.

  1. Add a new category to National Origin called "Two or more races".

  2. Rename Black to "Black or African American".

  3. Rename Hispanic to "Hispanic or Latino".

  4. Break out Asian or Pacific Islander into 2 separate categories - "Native Hawaiian or Other Pacific Islander" and "Asian".

  For more information, see Manual Changes for National Origin in the WinTeam Help program.

- **Added Show Report Criteria check box to the New Hire Report**

  The Report Criteria page includes any ranges specified and each Category/Record selection made for the report.

  For more information, see Employee Master (New Hire) Report in the WinTeam Help program.

- **Added ability to export a Phone List from the Employee Master File report options**

You can click the **Export Phone List** button to create a .csv file containing Employee Numbers, Employee Names, Employee Phone Numbers and Phone Descriptions (if available). You can use this file for importing a call list for CallQ Batches or for whatever internal needs you may have.
Column headers are necessary for CallQ.

For more information, see Employee Master Report in the WinTeam Help program.

Inventory

- **Added UPC column to the .csv import file for Usage/Resale records**

  We are now including a UPC column in the import file which allows importing based on the UPC code stored in Inventory items. Employees will scan in the Job #, UPC, and Quantity.

  For more information, see Sold/Usage in the WinTeam Help program.

Inventory Reports

- **Added Vendor Lookup button to the Vendor Range when printing requests for Purchase Orders/Drop Shipments**

  Added Vendor lookup button to the Vendor Range in the Category/Records area when printing requests for Purchase Orders/Drop shipments.

  For more information, see Request Print Report in the WinTeam Help program.

- **Added Custom Setting to include budget information on Requests**

  This setting includes information relative to the Job's Inventory budget to the Request Print form. This setting must be used in order to print the additional information on the Request Print form. Inventory Budget information can be included on Job Requests, Usage/Resale, and Drop Shipments.

Section	Item	Value
InvRequestReport	IncludeBudgets	True

  For more information, see Learning about Custom Settings in the WinTeam Help program.

- **Added the "Show Report Criteria" check box to Inventory Reports**

  Activities by Job/Item #, Item Groups, Item Master Report, Items on Hand, Items Received, and Items to Reorder.

  For more information, see each report in the WinTeam Help program.

Job Costing

- **Changes made to the Work Schedule Details (Scheduling by Job)**

  The Schedule Details grid will now display in ascending date order (oldest date on top, most current on bottom).

  Added ability to sort any column in ascending or descending order in the Schedule Details grid.

  For more information, see Scheduling by Job in the WinTeam Help program.

- **Change made to security of assigning employees to Job Master File Tier Descriptions**

  Changed so that WinTeam now looks at the User's Basic Read security level when determining the Employees that can be assigned to a Tier Description.

  Previously the system was looking at the User's HR Benefits Read security level and not allowing a User to assign an employee with a higher security level.

  For more information, see Tier Descriptions in the WinTeam Help program.

Job Costing Reports

- **Added Report Criteria check box to the Job File Report and the On Screen Job Cost Report.**

  The Report Criteria page includes any ranges specified and each Category/Record selection made for the report.

  For more information, see Job File Report or Job Cost Analysis Report in the WinTeam Help program.

Payroll

- **NEW PROGRAM FEATURE****Employee Pay Rate Creator****

  The Employee Pay Rate Creator program was developed to assist in creating Pay Info records for a large number of employees requiring the same type of pay increase.

  You can use this program when the new federal minimum wage changes go into effect.

  This program can only "increase" pay rates for employees, not "decrease".

  For more information, see Employee Pay Rate Creator in the WinTeam Help program.

  This video explains the Employee Pay Rate Creator. It should come in handy for the upcoming federal minimum wage increase later this month.

- **Can now print a void message all paycheck formats (except legal size since it already has its own "hard coded")**

  You can add this Custom Setting to print a void message on paycheck formats (selected in Payroll Defaults (Misc tab)). An example of a void message that you may want to print would be "VOID AFTER 30 DAYS".

  This setting can be used to print a void message on all paycheck formats (except the Legal formats, since they have a hard coded message on them).

Section	Item	Value
LaserPRCheck	VoidMessage	VOID AFTER 30 DAYS

  For more information, see Learning about Custom Settings in the WinTeam Help program.

- **Can now clear (uncheck) the Export to TeamTime option by default on the Employee Master File when adding a new Employee**

  You can add this Custom Setting to automatically clear (uncheck) the TeamTime option on the Employee Master File (Other Info tab) when adding a new Employee.

Section	Item	Value
Payroll	ExportToTT	No

  For more information, see Employee Master File (Other Info tab) in the WinTeam Help program.

- **Can now use an alternative Ceridian Payroll Export file**

  This setting will create the Ceridian Payroll Export file to be in a special format, not the standard Ceridian format.

Section	Item	Value
CPWIZ	UseNonStandardFormat	True

  For more information, see Check Processing Wizard in the WinTeam Help program.

- **Created new Payroll Outsource option for Infinium/Ultipro**

  Created new payroll outsource option for Infinium and Uptipro.

Section	Item	Value	Local To This Computer
CPWIZ	Ultipro	Yes	☐

For more information, see Outsource Payroll Agencies in the WinTeam Help program.

- **Tightened security for changes to Permanent TimeCards**

  Changed so if a User does not have Basic WRITE rights to the security level of an employee, we no longer allow them to add or change permanent time card info. In previous versions they could change this information.

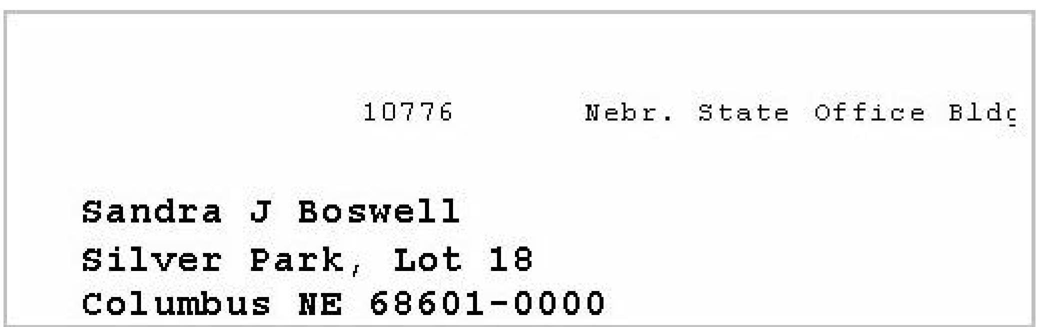
  For more information, see Permanent Timecards in the WinTeam Help program.

- **Added functionality to print the Primary Job on the Framed Sections paycheck format**

  Once this Custom Setting is set up, the system will print the Primary Job Name and Number on top of the paycheck. This setting applies only to the Framed Sections format.

Section	Item	Value
LaserPRCheck	PrintPrimaryJob	Yes

This is what prints on all check formats when using the custom setting (prints on the check form above the name and address information).



This was changed to not only print the Job Number and Name in the check area but also, if printing the framed sectioned format, to print the Primary Job and Name in the stub portion below the company name as shown below.

- **Added functionality to an existing Custom Setting for Framed Sectioned checks**

  The existing setting for printing the Distribution Code and Description in the check area has been altered to have additional functionality for Framed Sectioned checks.

  This setting will replace the Employee Type information that is normally printed in the stub area of the framed sectioned format with the Employee Distribution information. If the Group By selected is by Primary Job Site, the Primary Job Site information will print, otherwise it will always be the Employee Distribution.

Section	Item	Value
LaserPRCheck	PrintDistCodeDescription	Yes

  For more information, see Print Checks in the WinTeam Help program.

- **Improvements made to the Employee Other Compensations and Deductions screen**

  - Added the User Added and Changed information to this screen in order to see who added and last changed a particular line item.

  - Changed the Other Comp/Ded screens to 1024 x 768 to utilize the additional space that was needed for these new fields.

  For more information, see Other Compensations and Deductions in the WinTeam Help program.

- **Created new ARP format for Bank One**

  For more information, see NACHA Bank Transmission Report in the WinTeam Help program.

- **New magnetic media format for the Unemployment Compensation Report for Florida**

  Florida has changed their magnetic media format to an html format. They have also added some additional information to the file format that was not previously there. Beginning with the 2nd Quarter reporting of this year, employers must use this new format. Since not every company may be able to upgrade to this version in time for their 2nd quarter reporting deadline (July 31, 2007), we can assist Florida employer's in putting in place a new report file to use.

Personnel Scheduling

- **Added Zoom functionality for CID MM In and Out fields on the Detail Cell Info screen**

  Shift+ F2 Zoom functionality is now available for CID MM In and Out fields on the Detail Cell Information section. This will allow you to see the entire field description.

  For more information, see Detail Cell Information in the WinTeam Help program.

- **Added Read Only security to Post Watch**

  The Post Watch screen now has Read Only security. Set up the Post Watch screen to have Read Only security in the Group Security setup screen. The Read Only option for the Post Watch screen still allows users to change the Tier Pattern Template, Hours for which shifts display on the screen, Exceptions Only check box, and the Auto Refresh Option.

  Users also have access to the Go To, View, and Requery Options and shortcut keys. All Edit options are disabled, as well as Detail Query. Read only Users are prevented from changing any data on this screen.

  For more information, see Post Watch in the WinTeam Help program.

- **Addition to Post Watch accessibility**

  You can now access Post Watch from the PS Options menu.

  From the Personnel Scheduling Main Menu, click **Options**, and then click **Post Watch**. You no longer need to access Post Watch through PS Schedules.

  For Users with Read Only security, this is the recommended way to access Post Watch if you do not have PS Schedules rights.

  For more information, see Post Watch in the WinTeam Help program.

- **Added Custom Setting to include Special Add On's to the calculated Pay Rate**

  This Custom Setting will add in to the calculated Pay Rate any Special Add On that is set up in the Hours Category Details. Normally this would never be taken into account. Using this setting, special add on rates (example, uniform allowance) will be added in to the calculated rate when the billing rate is looked up. This rate carries through to reports as well. Once it leaves Personnel Scheduling the rest of WinTeam will not be reflecting this add on rate as part of the calculated rate.

Section	Item	Value
PersonnelScheduling	IncludeSpecialAddOn	Yes

  For more information, see PS Schedules in the WinTeam Help program.

- **Added ability to create invoices using the Job Name and Address information as the Bill To information**

  - Added a new check box to the Bill Codes By Job screen that enables invoices to be created using the Job Name and Address information instead of the Customer Name and Address as the Bill To information.
  This can be useful if you have multiple Jobs that are serviced by a customer and the customer prefers that the invoices be sent directly to the Job site for approval.

  For more information, see Bill Codes By Job in the WinTeam Help program.

Personnel Scheduling Reports

- **Added Custom Setting for use with the PS Timesheet by Job Report**

  Created Custom Setting to triple space between records on the PS Timesheet by Job Report.

Section	Item	Value
PSReports	TripleSpace	Yes

  For more information, see Timesheet by Job Report in the WinTeam Help program.

- **Added Custom Setting to change sort order to the PS Timesheet by Job Report**

  Created Custom Setting to sort the report in Employee Name order instead of Employee Number order. This will also force the Dates to be a secondary sort (so all of the scheduled cells for one employee show up together). This is not like the normal setting.

Section	Item	Value
PSReports	SortbyEmployeeName	Yes

For more information, see Timesheet by Job Report in the WinTeam Help program.

TeamBid and Work Scheduling

- **Added functionality to select a Supervisor for Work Schedules**

  You can now select a Supervisor for Work Schedules on the Who tab. This was added for additional functionality in eHub. The thought was to designate this as a Route supervisor which can be different than the Job supervisor. Selections come from the Supervisor table used by Job Master File and the Employee Master File. If you want to assign a route supervisor, set up supervisors in that pop up. When you log into eHub, route supervisors will be able to see their work schedules and print work tickets. (They may not be the job supervisor. Job supervisors will still be able to see all work schedules that their jobs are assigned to.)

  For more information, see WS Schedules (Who tab) in the WinTeam Help program.

- **New Supervisor field is available in the Advanced Filter to use.**

TeamBid and Work Scheduling Reports

- **Added the "Show Report Criteria" check box to TeamBid and Work Scheduling Reports**

  Daily Itinerary, Prospect File Report, and Task Codes

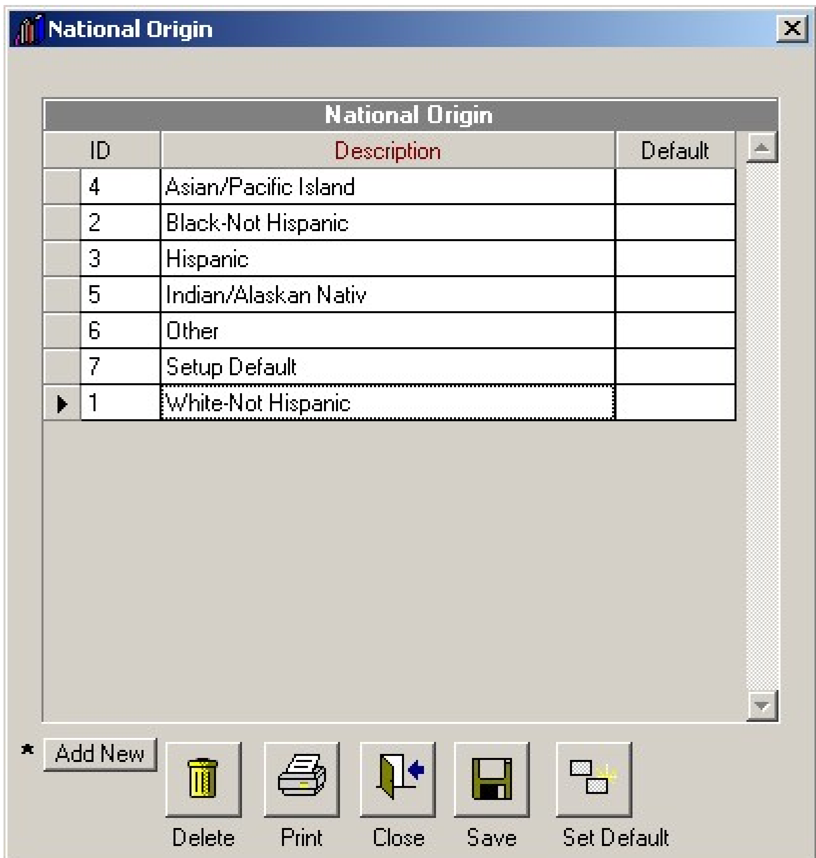
  For more information, see each report in the WinTeam Help program.

Manual Changes for National Origin

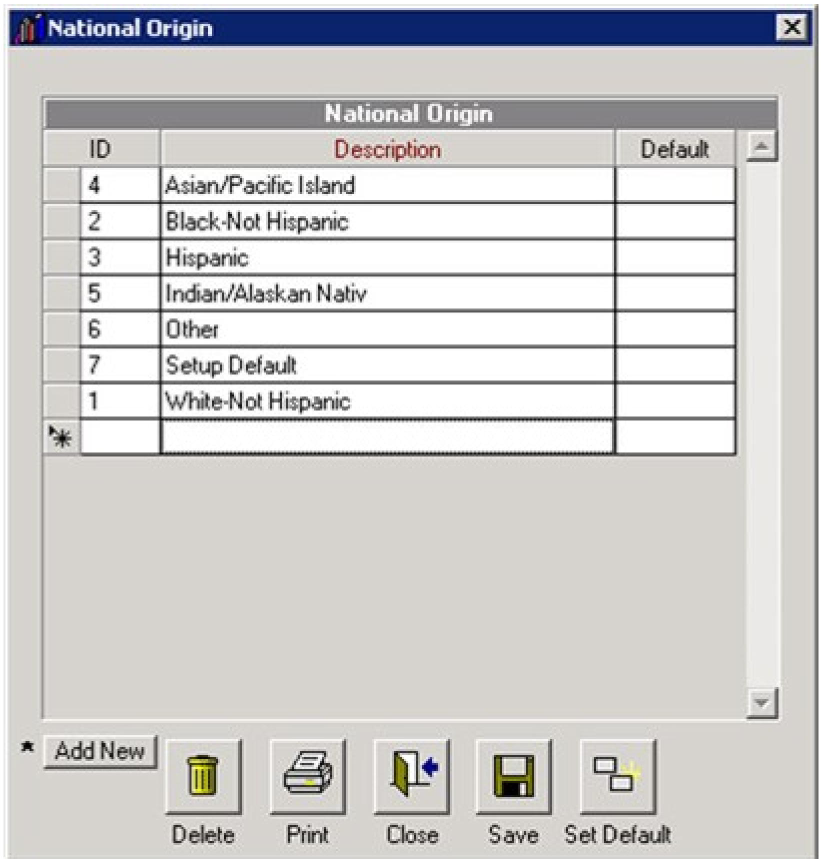
In order to comply with the 2007 law, please make the following changes to the National Origin add\edit list.

1. From the Payroll Main Menu, click **Employee Master File**.

2. Double-click in the **National Origin** field to display the National Origin add\edit list.



3. Click **Add New** to open a new row.



4. Type **Two or more races** in the Description field, and then click **Tab.** The record ID will automatically be assigned by the system.

5. On the next new row, type **Native Hawaiian/Oth Pac Island**, and then click **Tab**. The record ID will automatically be assigned by the system.

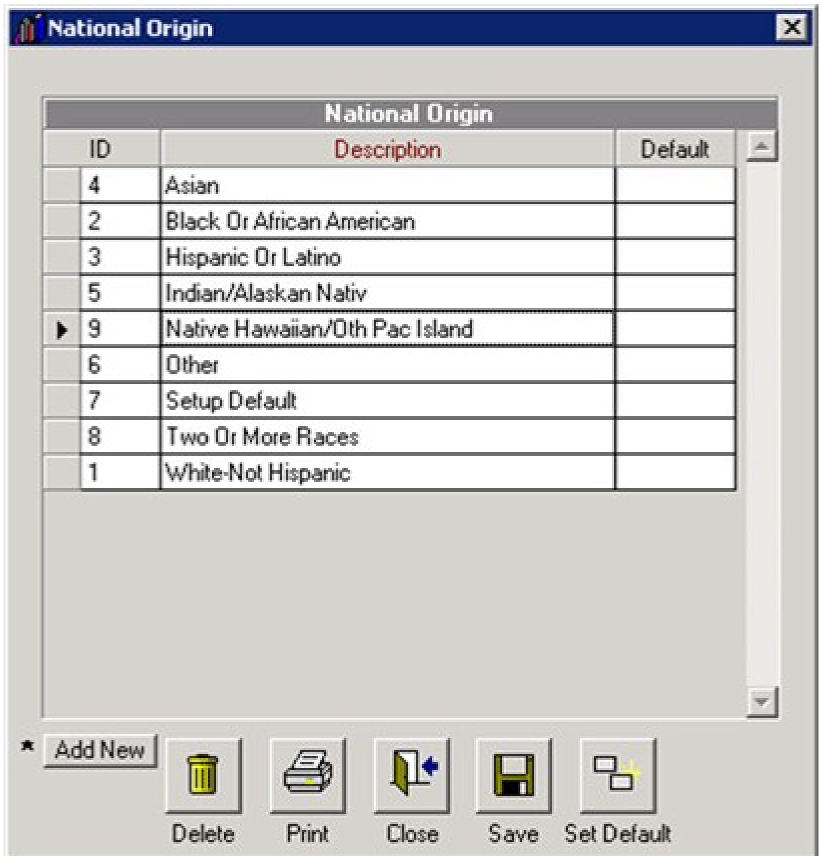
   Note: The official Description is Native Hawaiian or Other Pacific Islander. The full description must be abbreviated due to the 30-character maximum description length.

6. Select ID 2 Black-Not Hispanic, and change the Description to **Black or African American**, and then click **Tab.**

7. Select ID 3 Hispanic, and change the Description to **Hispanic or Latino**, and then click **Tab**.

8. Select ID 4 Asian/Pacific Island, and change to **Asian**, and then click **Tab**.

Your National Origin add\edit list should look similar to this:



Employee Pay Rate Creator

Overview

The Employee Pay Rate Creator screen can be accessed from the Payroll **Options** menu by selecting **Employee Pay Rate Creator.**

The Employee Pay Rate Creator program was developed to create Pay Information records for a large number of employees who are to receive the same type of pay increase. Rather than record pay information changes manually, one employee record at a time, you can use this program.

When minimum wage changes take effect, you can use this program to find employees who are making less than the "stated" amount, and create a pay information record for the date specified.

This program can only be used to "increase" pay rates for employees, it will not "decrease" pay rates.

This video explains the Employee Pay Rate Creator.

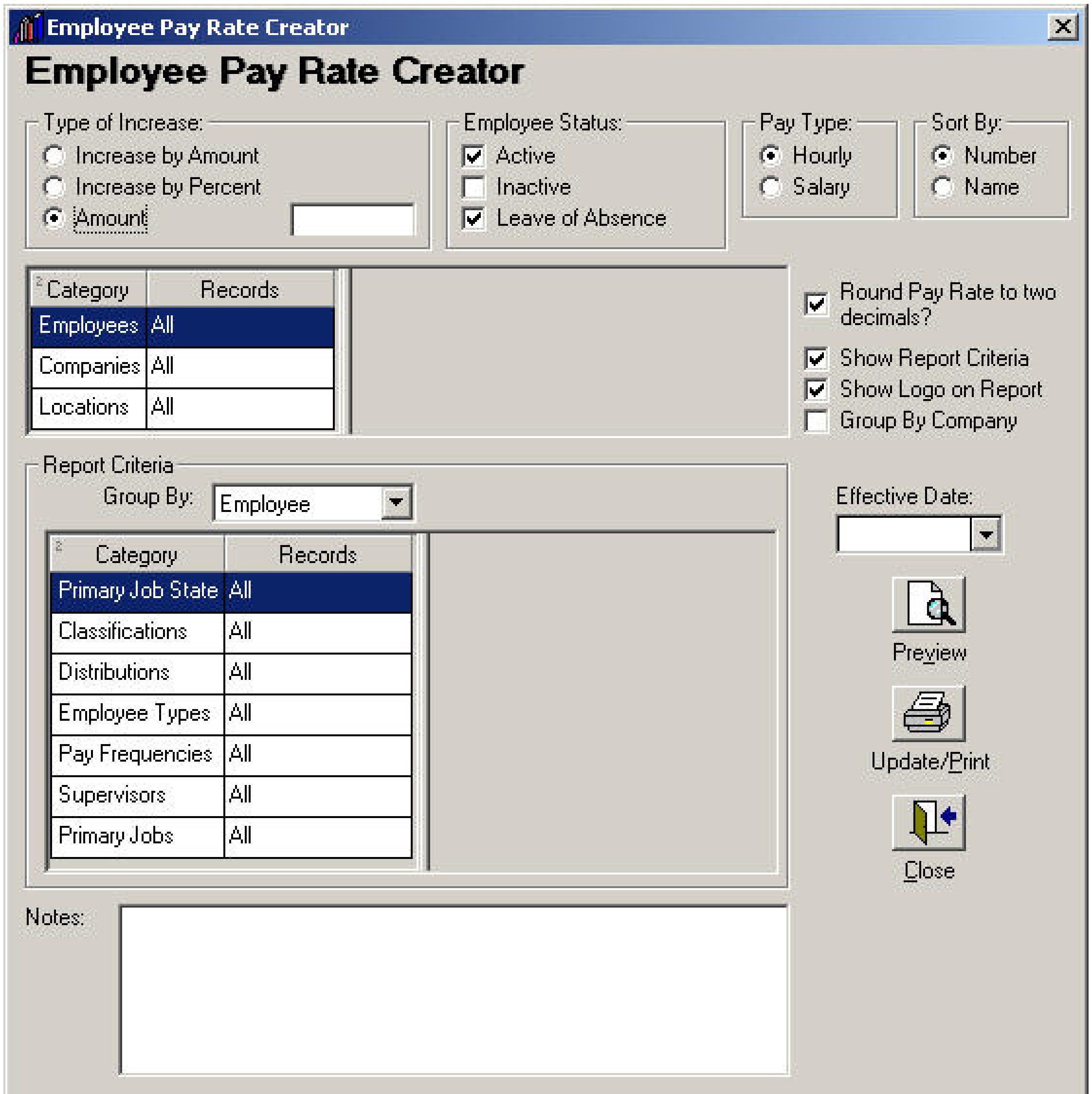
Security

The Employee Pay Rate Creator has its own Security Group, **PAY Employee Pay Rate Creator**.

The Employee Pay Rate Creator screen (not the PAY Employee Pay Rate Creator Security Group) is part of the PAY ALL Security Group.

The system will check the User's Pay Rate Write Security Level and include only those employee's within the User's Pay Rate Write Security Level.

Employee Pay Rate Creator screen



Definitions and Descriptions

Type of Increase

Select the type of Pay Rate increase to be made to the selected records.

Click **Increase by Amount** to give a flat dollar increase. This amount will be added to the pay rate that is effective for the employee as of the Effective Date entered. You can enter the amount using up to 4 decimal positions, but if the **Round Pay Rate to two decimals?** check box is selected, the rate will round to 2 decimals when the pay information record is created.

If the Employee's Pay Rate is equal to or greater than the Pay Rate calculated, the employee will not be included, nor will the employee list on the Exception Report.

Click **Increase by Percent** to give a percent increase. The percentage increase will be added to the pay rate that is effective for the employee as of the Effective Date entered. You can enter the amount using up to 4 decimal positions, but if the **Round Pay Rate to two decimals?** check box is selected, the rate will round to 2 decimals when the pay information record is created.

Click **Amount** to increase the employees pay rates up to a particular pay rate. This option could be used when the Federal or State Hourly pay rate is raised. The amount entered must validate to the minimum and maximum rates set up in Payroll Defaults. You can enter the amount using up to 4 decimal positions, but if the **Round Pay Rate to two decimals?** check box is selected, the rate will round to 2 decimals when the pay information record is created.

A list of Exceptions for each type of increase are detailed below the reports at the end of this topic.

Employee Status

Use the Employee Status option to filter the report by the status of the employee. The system will include employees with the selected status of the employee as of the Effective Date entered.

Click **Active** to include employees who have an Active Status as of the Effective Date. This option is selected by default.

Click **Inactive** to include employees who have an Inactive Status as of the Effective Date. This option is NOT selected by default.

Click **Leave of Absence** to include employees who are in a Leave of Absence Status as of the Effective Date. This option is selected by default.

Pay Type

Click **Hourly** or **Salary** to limit the employees based on Pay Type.

The default selection is Hourly.

Sort By

Use the **Sort By** option to sort the report data by Employee Number or Employee Name.

The default selection is to sort by Number (Employee).

Category / Records

Employees

Use the Employees category to select the Employees to include in the pay rate increase process.

Select **All** to include all Employees in the process.

Select **Range** to define a range of Employees for the process. When you select Range, the range fields display. Type the beginning Employee Number in the From field and the ending Employee Number in the To field.

Companies

The Companies category is available for Clients using the Multi-Company feature.

Use the Companies category to select the Companies to include in the process.

Select **All** to include all companies.

Select **Pick From List** to define specific Companies. When you select Pick From List, the Companies list displays only the Companies you have security to see. Select the check box next to each Company to include.

Locations

The Locations category is available for Clients using the Multi-Location feature.

Use the Location category to select the Locations to include in the process.

Select **All** to include all Locations.

Select **Pick From List** to define specific Locations. When you select Pick From List, the Locations list displays only the Locations you have security to see. Select the check box next to each Location to include.

Round Pay Rate to two decimals?

If this check box is selected, the calculated Pay Rate will round to 2 decimals.

If this check box is NOT selected, the calculated Pay Rate will round to 4 decimals.

Report Criteria

Group By

You may group this report by Employee, Classification, Distribution, Employee Type, Pay Frequency, Supervisor, Primary Job, or Primary Job State.

The default selection is Employee.

Category / Records

Primary Job State

Use the Primary Job State category to filter employee's by the Payroll State on the Job Master File (Accounting tab) .

Select **All** to include all states.

Select **Range** to define a range of states. When you select Range, the range fields display. Type the beginning state abbreviation in the From field and an ending state abbreviation in the To field.

Classifications

Use the Classifications category to select the Classifications to include.

Select **All** to include all Classifications.

Select **Pick From List** to define specific Classifications. When you select Pick From List, the Classifications list displays. Select the check box next to each Classification to include.

Distributions

Use the Distributions category to select the Distributions to include.

Select **All** to include all Distributions.

Select **Pick From List** to define specific Distributions. When you select Pick From List, the Distribution list displays. Select the check box next to each Distribution to include.

Employee Types

Use the Employee Types category to select the Employee Types to include.

Select **All** to include all Employee Types.

Select **Pick From List** to define specific Employee Types. When you select Pick From List, the Employee Types list displays. Select the check box next to each Employee Type to include.

Pay Frequencies

Use the Pay Frequencies category to select the Pay Frequencies to include.

Select **All** to include all Pay Frequencies.

Select **Pick From List** to define specific Pay Frequencies. When you select Pick From List, the Pay Frequencies list displays. Select the check box next to each Pay Frequency to include.

Supervisors

Use the Supervisors category to filter the records by Supervisors.
Select **All** to include all Supervisors.
Select **Pick From List** to select the Supervisor(s) to include.

Primary Jobs

Use the Primary Jobs category to filter the records by the employees Primary Job.

If the database is set up to track Primary Job History (on the Employee Master File (Pay Info tab), then based on the pay information record that is being looked at as of the Effective Date entered will determine the Job # and Job Name that prints with the record.

If you are not tracking Primary Job History, then the system will look at the Employee Master File (General tab) for the Primary Job site.

Show Report Criteria

Select the **Show Report Criteria** check box to include a list of the report options selected for this report.

The Report Criteria page includes any ranges specified and each Category/Record selection made for the report.

This check box is selected by default.

Show Logo on Report

Select the **Show Logo on Report** check box to print the company logo on the report.

This check box is selected by default.

Effective Date

Enter the effective date of the pay increase.

This date will be used to find the employee's current pay rate and use this to calculate what the new pay rate will be.

This is a required field.

Notes

Use the Notes field to specify information related to the employee pay increase. The Notes entered here will be updated with the Pay Information record.

Preview

Click **Preview** to review the employees effected by the pay increase.

The Preview report displays listing all the employees whose pay rate information will be increased. Once you click **Close**, the system then displays the Exception report.

If the employee meets the criteria but cannot be updated due to an exception, the exception will list on the Exception report.

The Exception report will print after the Preview report. Use the Exception report to review those records that will not be able to be updated automatically. These require manual attention since the Update/Print will not include them in the update.

Update/Print

Click the **Update/Print** button to update the valid records. An Update report will print showing all of the employees that a pay rate record was created for. An Exception report will print after the Update report. Use the Exception Report to review those records that could not be updated automatically. If after reviewing and finding that a pay rate increase is necessary, you will need to manually enter a new pay rate info record. If no Exception Report prints, this is an indication that there are no exceptions to enter.

Close

Click **Close** to return to the Payroll Main Menu.

Employee Pay Rate Creator (Preview)

River City Services Inc.

Effective Date: 07/23/2007

Employees Listed: Active ,LOA

Group By: Employee

River City Services, Inc.

Employee Pay Rate Creator

Preview

06/29/07 3:19:17 PM **Page 1 of 42**

Maximum Security Level 9

Employee # / Title / Old Pay Rate	Employee Name / Pay Type	Title Type / Effective Date	New Pay Rate	Status Info / EEO Code / OT Method	Hire Date / Accept Alt Rates	Supervisor / User Name	Promotion
161	**Lemons, Keisha R.**	**Active**		**01/01/06**	**01/01/06**	**Westside Schools**	
Pay Check Frequency: Semi-Monthly		**Next Review Date:**					
Cleaner		General Cleaner		Service Workers			No
$ 6.00	Hourly	01/01/06	$ 6.75	OT Method 1	Yes	WinTeam	
Primary Job: 10002		Westside Middle School		NE	**FT/PT Status:**	Full Time	
200	**Matthews, John L.**	**Active**		**01/01/06**	**01/01/06**	**Maggie Anderson**	
Pay Check Frequency: Semi-Monthly		**Next Review Date:**					
Cleaner		General Cleaner		Service Workers			No
$ 7.25	Hourly	01/01/06	$ 8.00	OT Method 1	Yes	WinTeam	
Primary Job: 10041		Mutual South		NE	**FT/PT Status:**	Other	
227	**Kimbrell, Lois M.**	**Active**		**01/01/06**	**01/01/06**	**Westside Schools**	
Pay Check Frequency: Semi-Monthly		**Next Review Date:**					
Cleaner		General Cleaner		Service Workers			No
$ 6.00	Hourly	01/01/06	$ 6.75	OT Method 1	Yes	WinTeam	
Primary Job: 10002		Westside Middle School		NE	**FT/PT Status:**	Full Time	
262	**Mcpherson, Martin W.**	**Active**		**01/01/06**	**01/01/06**	**Westside Schools**	
Pay Check Frequency: Semi-Monthly		**Next Review Date:**					
Cleaner		General Cleaner		Service Workers			No
$ 6.00	Hourly	01/01/06	$ 6.75	OT Method 1	Yes	WinTeam	
Primary Job: 10002		Westside Middle School		NE	**FT/PT Status:**	Full Time	
352	**Frazier, Corey**	**Active**		**01/01/06**	**01/01/06**	**Jim Smith**	
Pay Check Frequency: Semi-Monthly		**Next Review Date:**					
Cleaner		General Cleaner		Service Workers			No
$ 6.00	Hourly	01/01/06	$ 6.75	OT Method 1	Yes	WinTeam	
Primary Job: 10041		Mutual South		NE	**FT/PT Status:**	Other	
405	**Warbelton, Channing P.**	**Active**		**01/01/06**	**01/01/06**	**Westside Schools**	
Pay Check Frequency: Semi-Monthly		**Next Review Date:**					
Cleaner		General Cleaner		Service Workers			No
$ 6.00	Hourly	01/01/06	$ 6.75	OT Method 1	Yes	WinTeam	
Primary Job: 10002		Westside Middle School		NE	**FT/PT Status:**	Full Time	
432	**Henry, William D.**	**Active**		**01/01/06**	**01/01/06**	**Maggie Anderson**	
Pay Check Frequency: Semi-Monthly		**Next Review Date:** 01/01/07					
Cleaner		General Cleaner		Service Workers			No
$ 6.00	Hourly	01/01/06	$ 6.75	OT Method 1	Yes	WinTeam	
Primary Job: 10014		Dept-Utilities		NE	**FT/PT Status:**	Other	

Employee Pay Rate Creator (Exceptions)

This report will page break between Exceptions.

River City Services Inc.

River City Services, Inc.

Employee Pay Rate Creator

Exceptions

Effective Date: 07/23/2007

Employees Listed: Active ,LOA

Group By: Employee

06/29/07 2:37:13 PM **Page 1 of 3**

Maximum Security Level 9

Employee # / Title / Old Pay Rate	Employee Name / Pay Type	Title Type / Effective Date	Status Info / New Pay Rate	EEO Code / OT Method	Hire Date / Accept Alt Rates	Supervisor / User Name	Promotion
Exceptions:	**Employees whose new Pay Rate would exceed the max Hourly amount indicated in Payroll Defaults**						
1860	**Finney, Gary E.**	**Active**	**01/01/06**		**01/01/06**	**Harold Washington**	
Pay Check Frequency: Semi-Monthly		**Next Review Date:** 09/16/95					
Cleaner		General Cleaner		Service Workers			No
$11.00	Hourly	01/01/06	$11.75	OT Method 1	No	WinTeam	
Primary Job: 152		Carpet Cleaning - Omaha		NE	**FT/PT Status:**	Full Time	
2200	**Dickmeyer, Billie J.**	**Active**	**01/01/06**		**01/01/06**	**Jill Hilliard**	
Pay Check Frequency: Semi-Monthly		**Next Review Date:**					
Security Guard		Security Guard		Service Workers			No
$10.00	Hourly	01/01/06	$10.75	OT Method 1	Yes	WinTeam	
Primary Job: 10111		First Bank-Main		MN	**FT/PT Status:**	Other	
2267	**Smith, Mike M**	**Active**	**01/01/06**		**01/01/06**	**Maggie Anderson**	
Pay Check Frequency: Semi-Monthly		**Next Review Date:**					
Security Guard		Security Guard		Service Workers			No
$13.00	Hourly	01/01/06	$13.75	OT Method 1	Yes	WinTeam	
Primary Job: 5000		Sunshine Valley Retirement		NE	**FT/PT Status:**	Other	
2268	**Brown, Jennifer K**	**Active**	**01/01/06**		**01/01/06**	**Harold Washington**	
Pay Check Frequency: Semi-Monthly		**Next Review Date:**					
Scheduler		Scheduler		Office and Clerical			No
$16.50	Hourly	01/01/06	$17.25	OT Method 1	Yes	winteam	
Primary Job: 5000		Sunshine Valley Retirement		NE	**FT/PT Status:**	Other	
2270	**Plambeck, Shirley J**	**Active**	**01/01/06**		**01/01/06**	**Maggie Anderson**	
Pay Check Frequency: Semi-Monthly		**Next Review Date:**					
Security Guard		Security Guard		Service Workers			No
$12.50	Hourly	01/01/06	$13.25	OT Method 1	Yes	WinTeam	
Primary Job: 5000		Sunshine Valley Retirement		NE	**FT/PT Status:**	Other	
2271	**Taylor, Patty T**	**Active**	**01/01/06**		**01/01/06**	**Maggie Anderson**	
Pay Check Frequency: Semi-Monthly		**Next Review Date:**					
Security Guard		Security Guard		Service Workers			No
$10.50	Hourly	01/01/06	$11.25	OT Method 1	Yes	WinTeam	
Primary Job: 5000		Sunshine Valley Retirement		NE	**FT/PT Status:**	Other	
2274	**Brown, Charles W**	**Active**	**01/01/06**		**01/01/06**	**Maggie Anderson**	
Pay Check Frequency: Semi-Monthly		**Next Review Date:**					
Security Guard		Security Guard		Service Workers			No
$12.95	Hourly	01/01/06	$13.70	OT Method 1	Yes	WinTeam	
Primary Job: 5000		Sunshine Valley Retirement		NE	**FT/PT Status:**	Other	

Exceptions (by Type of Increase)

Increase by Amount

- If the Employee's Pay Rate is equal to or greater than the Pay Rate calculated as of the Effective Date entered, the employee will not be included, nor will the employee list on the Exception Report.

- If the increase amount exceeds the maximum set up in the Pay Defaults (Pay Validations area), the employee pay rate is not updated. This exception is listed on the report.

  The following message displays for Hourly employees:
  "Employee's new Pay Rate will exceed the maximum Hourly amount indicated in the Pay Defaults screen."

  The following message displays for Salary employees:
  "Employee's new Pay Rate will exceed the maximum Salary amount indicated in the Pay Defaults screen."

- If the employee has a Pay Info record with an effective date equal to the Effective Date entered, and the employee's pay rate of this record is less than the Pay Rate calculated, the employee is considered an exception and will list on the Exception report.

  The following message displays:
  "Employee has a Pay Info record with this Effective Date."

- If the employee has a Pay Info record with an Effective Date greater than the Effective Date entered, regardless of the pay rate of this record, the employee is considered an exception and will list on the Exception report.

  The following message displays:
  "Employee has a future Pay Info record and will not be included."

Increase by Percent

- If the employee's pay rate is equal to or greater than the Pay Rate calculated as of the Effective Date entered, the employee will not be included, nor will the employee list on the Exception Report.

- If the increase amount exceeds the maximum set up in the Pay Defaults (Pay Validations area), the employee pay rate is not updated. This exception is listed on the report.

  The following message displays for Hourly employees:
  "Employee's new Pay Rate will exceed the maximum Hourly amount indicated in the Pay Defaults screen."

  The following message displays for Salary employees:
  "Employee's new Pay Rate will exceed the maximum Salary amount indicated in the Pay Defaults screen."

- If the employee has a Pay Info record with an effective date equal to the Effective Date entered, and the employee's pay rate of this record is less than the Pay Rate calculated, the employee is considered an exception and will list on the Exception report.

  The following message displays:
  "Employee has a Pay Info record with this Effective Date."

- If the employee has a Pay Info record with an Effective Date greater than the Effective Date entered, regardless of the pay rate of this record, the employee is considered an exception and will list on the Exception report.

  The following message displays:
  "Employee has a future Pay Info record and will not be included."

Amount

- If the employee's pay rate is equal to or greater than the Pay Rate calculated as of the Effective Date entered, the employee will not be included, nor will the employee list on the Exception Report.

- If the amount exceeds the maximum set up in the Pay Defaults (Pay Validations area), you will be warned with a message and not allowed to continue.

  If the employee has a Pay Info record with an effective date equal to the Effective Date entered, and the employee's pay rate of this record is less than the Pay Rate calculated, the employee is considered an exception and will list on the Exception report.

  The following message displays:
  "Employee has a Pay Info record with this Effective Date."

- If the employee has a Pay Info record with an Effective Date greater than the Effective Date entered, regardless of the pay rate of this record, the employee is considered an exception and will list on the Exception report.

  The following message displays:
  "Employee has a future Pay Info record and will not be included."

Updating WinTeam 4.4.xxx

These procedures are for clients who are currently on a WinTeam 4.1, 4.2 or 4.3 and want to update to the most current version.

To update WinTeam version 4.1, 4.2 or 4.3 or above to the most current version of WinTeam 4.4.xxx please read and follow these instructions.

If your current version is WinTeam 3.6 or 4.0 please call TEAM for assistance.

Important Information

- Do not run automatic updates when using WinTeam through Citrix or terminal server machines.
- The Auto Update area in WinTeam System Defaults must be configured prior to updating.
- Microsoft's Windows Vista operating system and Microsoft SQL Server 2005 are not supported at this time. TEAM has successfully completed testing of its 4.x products with Windows XP Service Pack 2. TEAM did not encounter any compatibility issues between Service Pack 2 and TEAM's 4.x products. TEAM does not guarantee compatibility of Service Pack 2 with any third-party software.
- If you are unsure of your system compatibility please call TEAM for assistance.

Very Important Information

You must be logged into the local machine as the local administrator or as a user in the local administrator's group prior to installing.

Verify that you have a good backup before starting the update. If you are not sure, check with your System Administrator or see Using the Database Maintenance Plan Wizard.

Verify that you have an adequate amount of free disk space to perform the update. A general guideline is to make sure that you have free disk space at least 3 times the size of your \Databases and \Logs folders (wherever they reside). If you are not sure, please call Team.

☐Verify your WinTeam Program Version

From the **Help** menu, select **About WinTeam**.

If your current version is **less** than **WinTeam 4.1.xxx**, you must **UPGRADE** to WinTeam 4.3. Contact a Team Support Analyst for assistance.

☐ Review the current WinTeam Release Notes and the WinTeam Version History.

☐ **Verify that Microsoft .NET Framework version 2.0 is installed on the WinTeam database server and each workstation . This may have already been installed through Windows Updates. If you attempt to install it again, you will receive a message. If you have installed .NET Framework version 3.0 (without also having version 2.0 installed) the WinTeam installation will continue with no errors, but WinTeam will not work.**

YOU MUST HAVE .NET FRAMEWORK VERSION 2.0 INSTALLED on the WinTeam database server and each workstation before updating.

If this has not been installed you can download Microsoft .NET Framework version 2.0 from Microsoft's Web site. Review the information provided from Microsoft's site. Below is the link:

http://www.microsoft.com/downloads/details.aspx?FamilyID=0856eacb-4362-4b0d-8edd-aab15c5e04f5&displaylang=en

You do NOT need to uninstall Microsoft .NET Framework version 1.1 or version 3.0 first.

Citrix Servers

If you are installing .Net Framework 2.0 on Citrix servers, you will need to keep Microsoft .NET Framework version 1.1. You also need to put in a special setting that basically points Citrix to use 1.1 instead of 2.0.

Create a file called “mmc.exe.config” in the \Windows\system32 directory and add the following lines to the file. You should be able to open the Citrix Access Suite Console without any further problems.

```
<?xml version ="1.0"?>
<configuration>
<startup>
<requiredRuntime version="v1.1.4322"/>
<supportedRuntime version="v1.1.4322"/>
</startup>
</configuration>
```

Reference: http://support.citrix.com/article/CTX108104&searchID=11393906

Create this file on all servers that will have Citrix (Presentation Server or Web Interface) and WinTeam loaded. This will allow MMC’s (Citrix uses Microsoft Management Consoles as their GUI) to use version 1.1 but still allow WinTeam to use the new version 2.0 framework.

☐ **Download the Installation (update) file**

1. A File Download message displays, prompting you to Open or Save the file. Click **Save**.

2. A File Save As dialog box displays.

3. Navigate to the folder you wish to save the file in, and then click **Save**.

NOTE: You MUST save this file to the same file path that you entered in your

WinTeam System Defaults, Update File Path field (typically x:\winteam\updates).

4. When a file or pop-up is blocked, a message will appear on the Information bar. If you are sure that you want to download the file, click the **Information bar**, and then click **Download File**.

   You will need to turn off Information Bar messages about blocked pop-up windows and stop the Information Bar from blocking file and software downloads.

   To turn off Information Bar messages

   1. Open Internet Explorer (this applies to IE 6.0+ and IE 7.0).
   2. Click the **Tools** button, click **Pop-up Blocker**, and then click **Pop-up Blocker Settings**.
   3. Clear the **Show Information Bar** when a pop up is blocked check box, and then click **Close**.

   To stop the Information Bar from blocking file and software downloads

   1. Open Internet Explorer.
   2. Click the **Tools** button, and then click **Internet Options**.
   3. Click the **Security** tab, and then click **Custom level**.
   4. Do one or both of the following:
      1. To turn off the Information bar for file downloads, scroll to the Downloads section off the list, and then, under Automatic prompting for file downloads, click **Enable**.
      2. To turn off the Information bar for ActiveX controls, scroll to the ActiveX controls and plug-ins section of the list, and then, under Automatic prompting for ActiveX controls, click **Enable**.

   Click **OK**, click **Yes** to confirm that you want to make the change, and then click **OK** again.

☐ **Perform Program File Update**

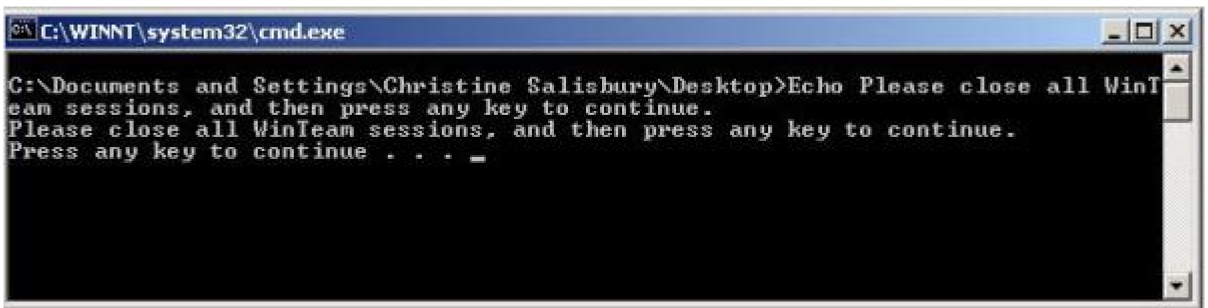
1. When you log in to WinTeam, the system checks the version numbers of your program and database files. In order to prevent workstations from having different program and database files, the system prompts you to update the version if the program and database versions are different from each other. The update is **required** to be performed unless the User logging in belongs to the **SYS ALL** security group or has a special Custom Setting in place.

   Example

   When you log in to WinTeam, the system checks the version numbers of your program and database files. If the versions are different from each other, you will see a message similar to this:

2. Click **Yes** to begin the Program File Update process. (Note: If you click **No**, you will receive a message, and **not be** allowed to continue into WinTeam unless you have SYS_All rights or a special Custom Setting is in place. See your WinTeam Administrator. This will prevent workstations from having different program and database files.)

   You will see a DOS screen similar to this:



3. **IMPORTANT!!!! Close all WinTeam sessions**.

4. Press any key to continue.

   During the Program File Update, the following procedures are performed:

   The system copies files needed to update the Program File.

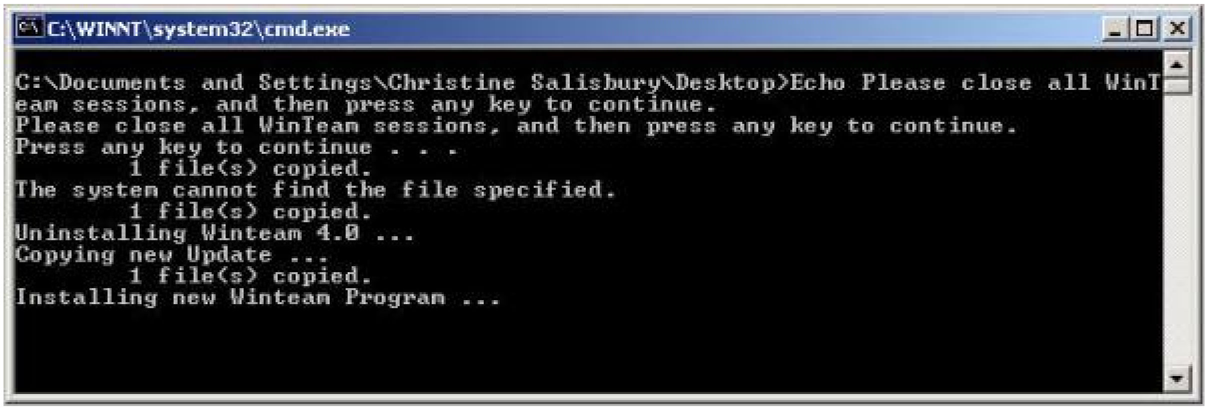
   The system uninstalls your current version of WinTeam (Program File only).

   The system copies the new Program File.

   The new WinTeam Program File is installed.

   This process may take quite some time based on your processor speed and network traffic. Do not close or end this process using Task Manager. Ending this process may cause data corruption!

   You may even see some messages similar to this on the DOS screen.

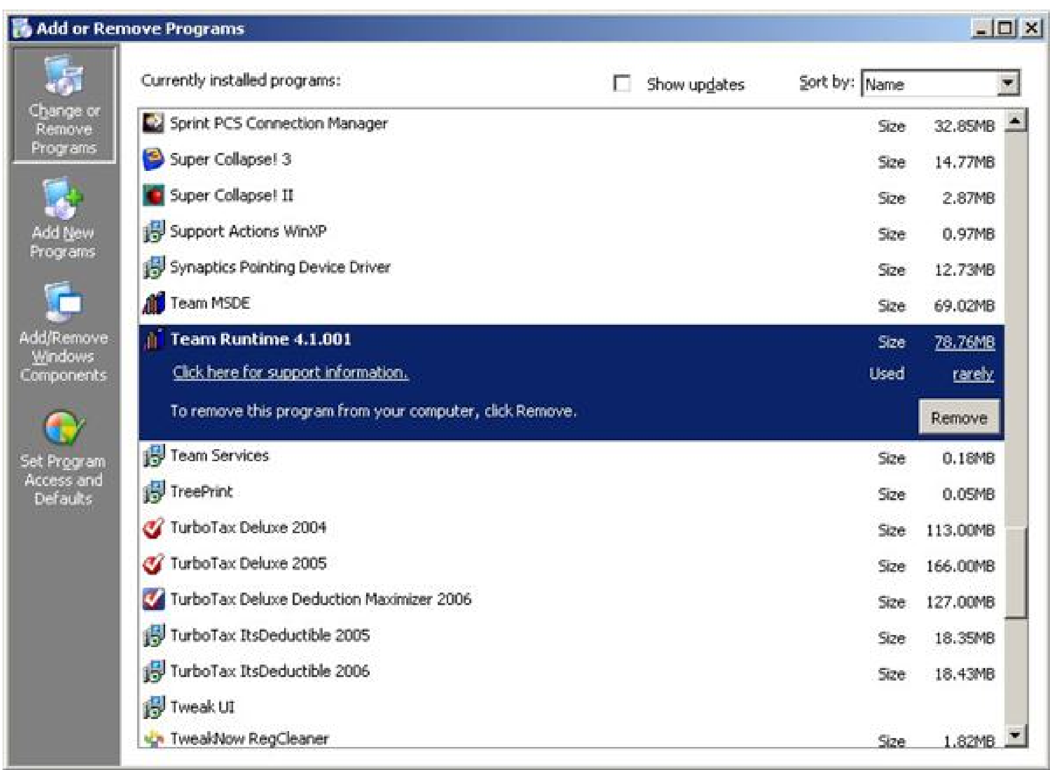


5. When the update process is complete, the DOS screen closes.

☐ **Uninstall Team Runtime version 4.1.001**

YOU DO NOT NEED TO DO THIS STEP IF YOU ARE CURRENTLY ON ANY WINTEAM 4.4 VERSION

1. Click **Start**, and then click **Control Panel**.
2. Double-click **Add or Remove Programs**.
3. On the Add/Remove Programs screen, click T**eam Runtime 4.1.001**.



4. Click **Remove**.

☐ **Download and install Team Runtime 4.4**

YOU DO NOT NEED TO DO THIS STEP IF YOU ARE CURRENTLY ON ANY WINTEAM 4.4 VERSION

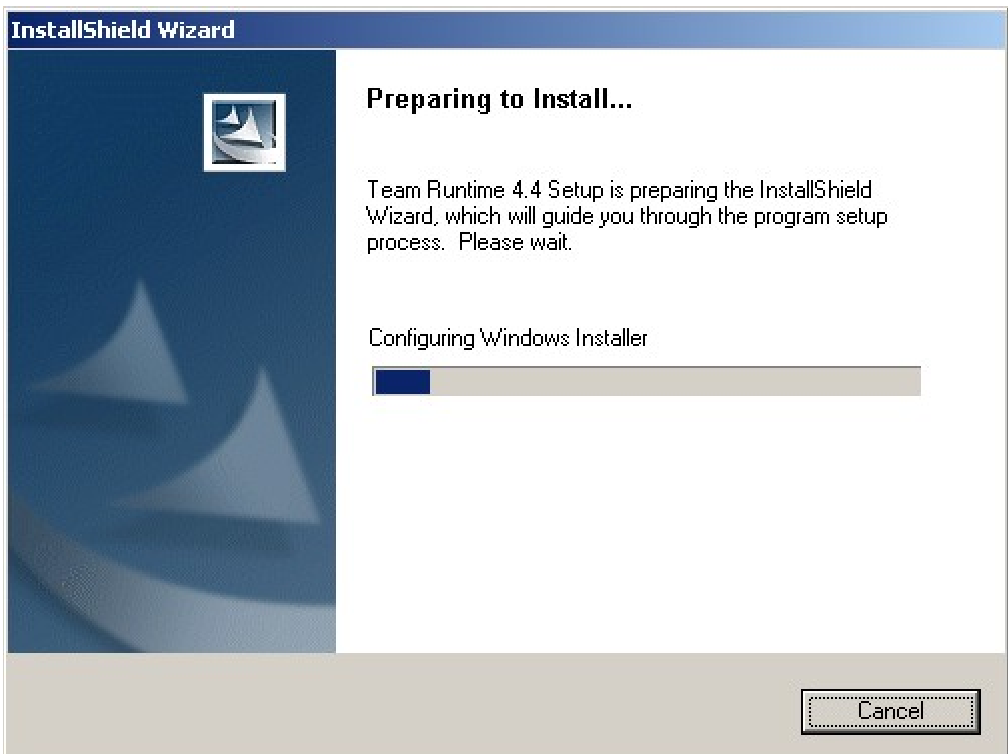
1. Download the teamruntime.exe file from the Team Updates Web site

1. A File Download message displays, prompting you to Open or Save the file. Click **Save**.

2. A File Save As dialog box displays.

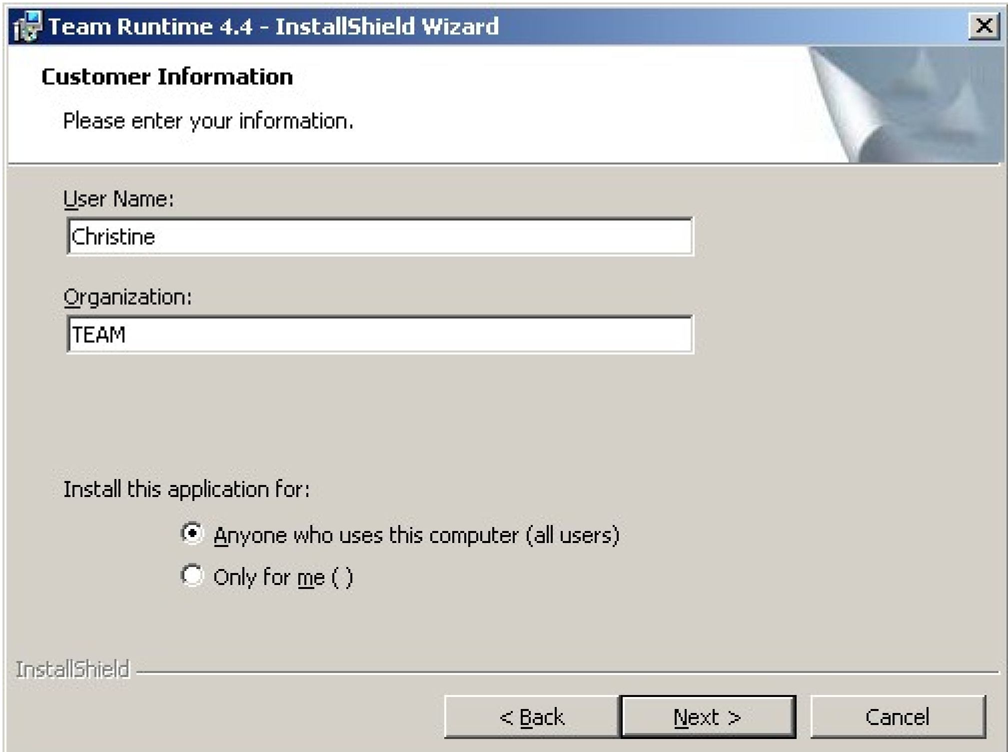
3. Navigate to the folder you wish to save the file in, and then click **Save**.

4. Double-click the file to begin the installation process.

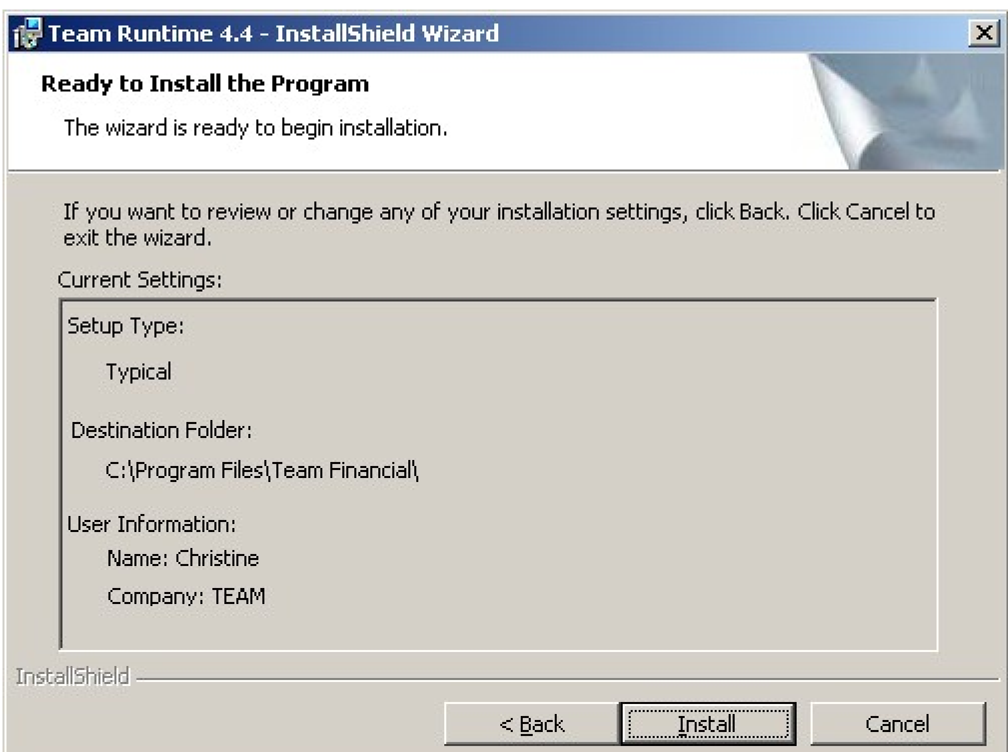


5. Once the InstallShield Wizard is prepared, the Team Runtime InstallShield Wizard displays. Click **Next**.

6. On the Customer Information dialog box, type your User Name and Organization (optional), and then click **Next**.

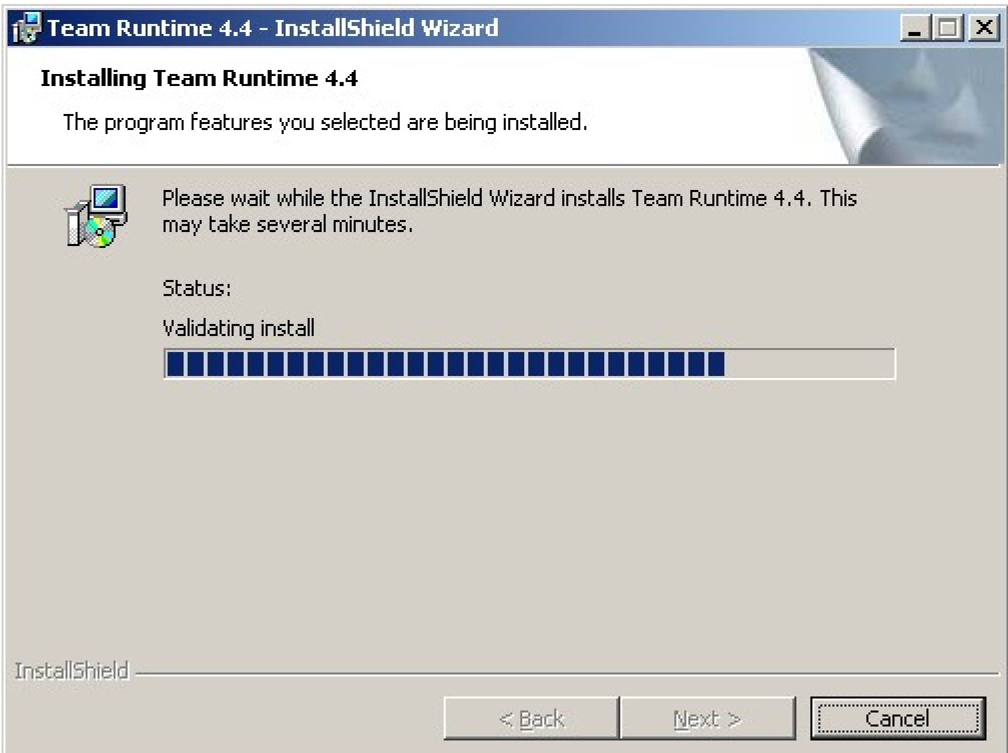


7. Verify the installation settings, and then click **Install**.

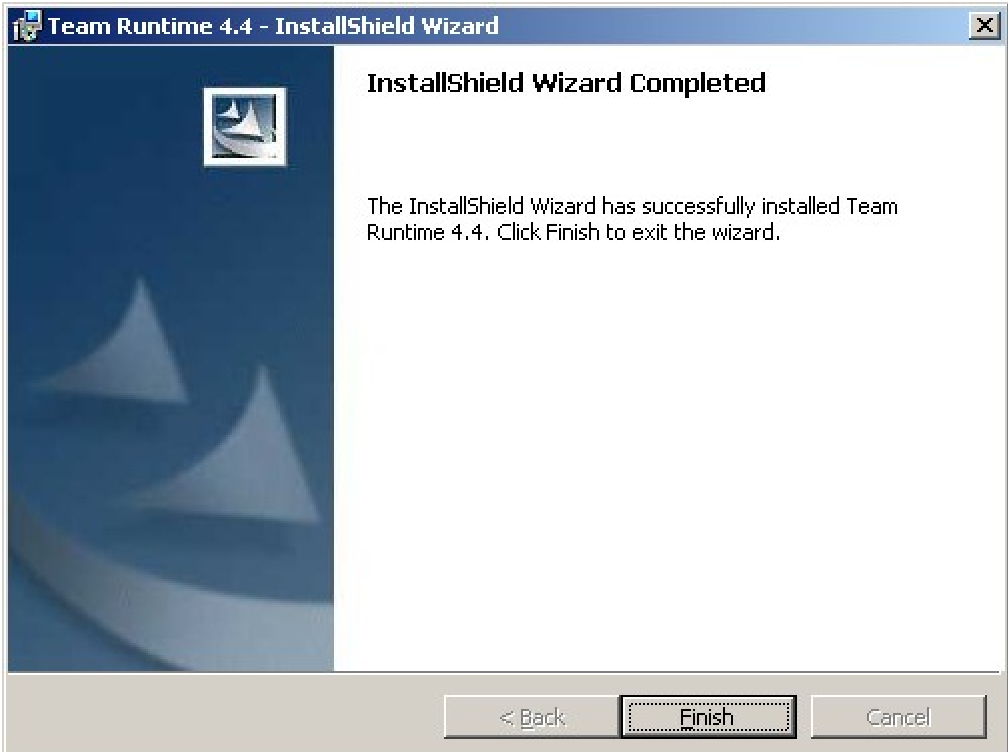


8. The installer displays a progress indicator showing the installation status.

NOTE: If you are installing on a computer running Windows XP this process may take as long as 10 minutes to install.



9. Click **Finish**.



☐ Perform Database File Update

1. Login to WinTeam.

2. When you login to WinTeam, you will receive a message similar to this if your Program Version is greater than your Database Version:

3. Click **Yes**, to begin the update process. (Note: If click **No**, your database file will NOT be updated, you will receive a message stating so, and will not be allowed to continue into WinTeam **unless** you have SYS ALL rights or a special Custom Setting is in place.
   If you still choose to continue running a version of WinTeam that may not be compatible with its database TEAM **WILL NOT** assume responsibility for any errors that may occur. See your WinTeam Administrator for guidance.

4. Once you click **Yes,** you may (for a brief moment) see a DOS screen, where the system begins extracting scripts to perform the update.

   Then you will see the Database Update in Progress screen.

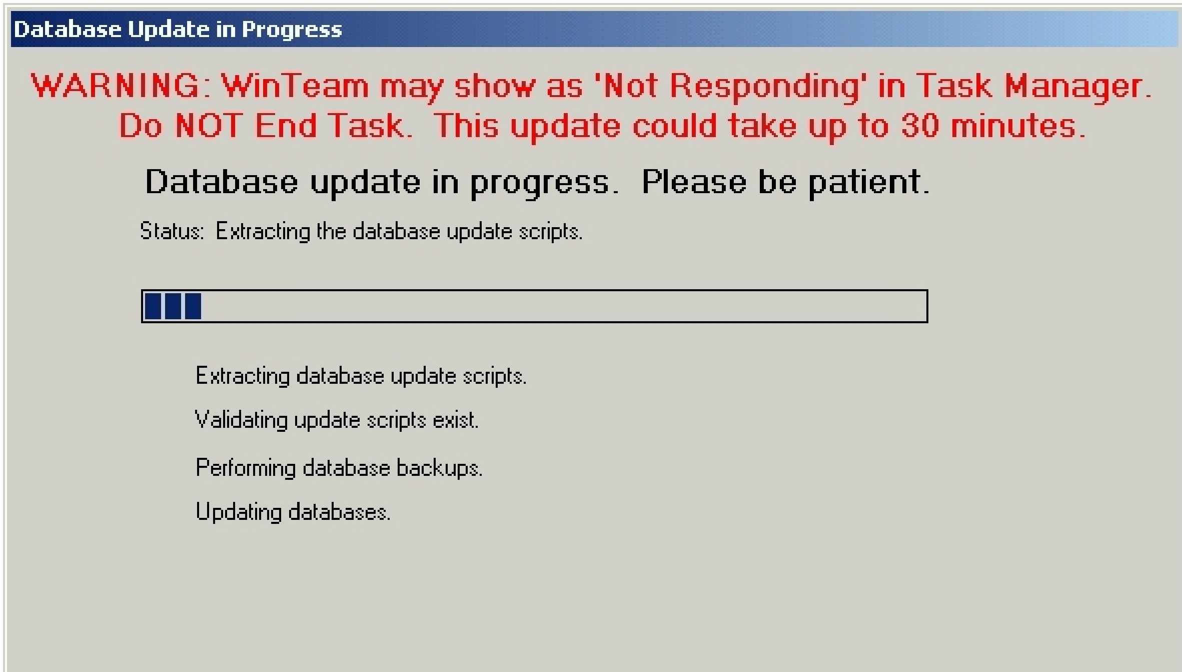
   During the Database Update, the following procedures are performed:

The system extracts the scripts needed to update the database.

The system checks to make sure scripts needed do exist.

The system creates a backup of all current WinTeam databases.

Databases are then updated to new version.

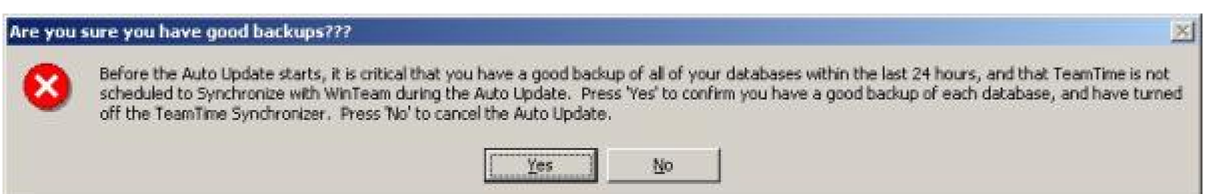


This process may take quite some time based on your database size, number of databases, and processor speed.

NOTE: Do not close out or use the Task Manager to end the process. If you think there is a problem with the update, call Team Support.

Do not close or end this process using Task Manager. Ending this process may cause data corruption!

4. At this time, the system performs a series of Auto Update Checks. If you receive any message, other than the one shown below, please refer to Auto Update Checks documentation. Some errors encountered during the auto update process **will** cause the auto update to fail.



Click **Yes** to confirm that you have a good backup of each database, and have turned off the TeamTime Synchronizer (if applicable).

Click **NO** to cancel the update process.

5. When the update database process is complete, the **About WinTeam** screen displays.

Click **OK** to close the About WinTeam screen.

6. The system will then perform a series of Database Checks on your system, provided you belong to the applicable security group. These checks do not prevent you from completing the update. They are informational in nature, but will be logged in the Critical Alerts Log. For more information on Database Checks, see Database Checks.

7. Once all checks have been made, the system displays this message:

4. Click the link to review the Release Notes for this version. Here you can learn about all the new features and enhancements that are in this version.

   If you do not want to see this message again for this version, select the **Don't show this message again** check box.

☐ **Review Known Issues**

☐ **Download the latest WinTeam Help file**

Save the winteam.chm file to the same directory as the winteamp.exe file.

If you have any questions, please review these instructions before calling our Support Department at 402.345.5660.

Version History Table of Contents

WinTeam Version History 4.4.008 to 4.4010

Accounts Payable Reports

AP NACHA Bank Transmission

12723

Created new ARP format for Comerica.

Section	Item	Value
APNACHA	NACHAReportName	Comerica

Inventory

Drop Shipment

12514

Added Custom Setting to enable ability to import Drop Shipment information from a .csv file.

Section	Item	Value
Inventory	DropshipImport	Yes

Payroll

Check Processing Wizard

12642

ADP - Windows outsource option

A special custom setting was created to change a column heading within the export file for the hours export. The column header will change from being the normal column heading of “Temp Dept” to “Temp Cost Number”. This is necessary only when there are multiple Jobs that an employee’s wages are being charged to.

Make sure you check with ADP before you start using this Custom Setting.

Section	Item	Value
ADP	UseTempCost	Yes

Check Processing Wizard

12562

ADP - FQM Outsource option

Changes made to this outsource option to include additional Hours Types to come through with specific codes.

Check Processing Wizard

12657

ADP - Windows Outsource option

Changed format so that if an employee's phone number is blank in WinTeam, the phone number will now export as blank in the Employee Export file. Previously a 0 was being exported.

Check Processing Wizard

12656

ADP - Windows Outsource option

Created setting for those clients that are on ADP’s most current platform, Pay Expert.

ADP has changed a couple of column headings since their older version and we changed those column headings to come through properly when the export file is created within WinTeam. The column heading changes are as follows:

Old Heading	**New Heading**
Federal Tax Modification Amount	Federal Extra Tax $
Hire Status	Employee Status

The Custom Setting that will be used for this purpose is:

Section	Item	Value
ADP	UsePayExpert	Yes

Check Processing Wizard

All Outsource payroll options except BBSI

12734

For all outsource payroll options, with the exception of BBSI, changes were made to limit the number of employees that are exported when the employee export program runs.

We will now be sending through:

- All Active and Leave of Absence Employees that have a hire date that is equal to the pay period ending date or less than this date.
- All inactive employees with an inactive date on or before the pay period ending date that is within the calendar year (based on the pay period ending date).
- Any inactive employee that had changes made to their record within the last 90 days based on the pay period beginning date. Previously, all inactive employees were being sent through even though they may have been inactive for several years.

Check Processing Wizard

12673

Oneida Outsource option

Change made for clients using the Oneida outsource payroll option. We are now pulling Custom field 2(Company code) into the export file.

Check Processing Wizard

12600

Oneida Outsource option

Changed the hourly Codes in their file format to HOUR, OT, DOT.

Check Processing Wizard

12722 and 12810

Sanitors Outsource option

Corrected an issue with this outsource option so if using weighted averaging the overtime rate comes through as the weighted average rate. Also made a change so that no double time rate comes through for double time hours if there is no weighted average rate for that week.

Direct Deposit Information

12747

New functionality available with a Custom Setting that will bring up a verification window requiring the Routing number and the Account number to be entered a second time for validation.

Section	Item	Value
Payroll	ValidateDDInfo	Yes

PAY Employee Master File

12554

The functionality of an existing Custom Setting was changed so that when rolling over an employee record, the Custom Field values are not included. Normally, the rollover does include the custom field information.

This setting also rolls over extra information that is not normally rolled over including Employee Name, Address and Pay Rate fields. This is not something most companies would ever be using.

Section	Item	Value
EmpRollover	ExtraInfo	True

PAY Other Compensations and Deductions

12538

Corrected issue with the User Name and Date Added not being added to the Other Compensation detail line properly.

PAY Timekeeping Import

12451

Improved processing speed when importing timekeeping for an Excel spreadsheet.

The option for importing from an Excel spreadsheet is available with the following Custom Setting in place.

Section	Item	Value
TKImport	UseXLsfile	True

Timekeeping Import

12084

Created Custom Setting to exclude import hours for any employee who was on leave of absence or was inactive. If there are timekeeping records that are greater than the Leave of Absence or Inactive date, these will not be imported. They will list as Employee exceptions on the report.

Section	Item	Value
TKImport	ExcludeTermEmpsTK	True

Timekeeping Import

12450

Created Custom Setting to set a default file path when using the import from an Excel spreadsheet Custom Setting.

The value is the default file path.

Section	Item	Value
TKImport	DefaultDirectory	C:\TKImports

Payroll Reports

PAY NACHA Bank Transmission

12723

Created new ARP format for Comerica.

Section	Item	Value
Payroll	Backupdatabase	No

Unemployment Compensation Tax Report

12463

Changed the file name that is created for IN (Indiana) Unemployment Compensation to UIWAGE.TXT.

Personnel Scheduling

Detail Cell Information

12461

Corrected issue where the Invoice Detail drop down was not showing any selections if the detail cell had already been updated by the PS Wizard.

PS Bill Codes

12730

Resolved issue that was occurring when setting up a Do Not Invoice Bill Code. In some instances the User was allowed to leave the record without setting up a row in the details area.

Fixed Assets

FA Assets

12455

Corrected issue where a Job Number was being interpreted as a “date” in those cases where the Job Number began with a 1- thru 12-.

When entering the initial Job information (Primary Depr. Job or Job Assigned To fields), the Job was reformatted as a date.

Payroll

PAY Check Wizard

PAY Update to General Ledger

12415 and 12418

Changes were necessary for Recurring With Limit compensations in order to allow someone to have a negative Recurring with Limit compensation and have it recognized as “reaching the limit”. We also changed some logic in the update to general ledger so that the compensation was not deleted prematurely since the negative limit had not been reached yet.

PAY Review and Edit

12483

Changed the minimum wage filter to default to $5.85 instead of $5.15.

PAY Employee Master File

12485

Changed to require Birth Dates to be entered as 4 digits. Previously you could only enter 2 digits. If the employee was born before 1930, the year 29 was being interpreted as 2029 instead of 1929. This will be a nice change for those that employ the very elderly.

PAY Report Timekeeping By Employee

12448

Resolved issue that was occurring when running the Timekeeping By Employee report and choosing the Show Recap by Job check box. An error was occurring “Failed to load database information” and no report would display.

Personnel Scheduling

PS Report Overtime Warning

12436

Resolved issue that was occurring when the Overtime report was run for an employee that did not have current weekly hours, but there were overlap hours from a previous week for the Job that were marked with the overtime indicator flag. The report was not showing these hours as overtime.

PS Schedules

12455

Minor changes made to determine overtime for employees who are set up with Overtime Method 9. (This overtime method is exempt from any overtime.) Changed scheduling so if OT Method 9 is used, the system will not warn if the employee goes over 40 hours.

WinTeam Version History 4.4.005 to 4.4.006

Personnel Scheduling

PS Schedules

#12437

Corrected the error that was occurring when using this Custom Setting:

PSSchedules, UseOvertimeProcessor, Yes

The system will now go through the overtime processor when scheduling an employee.

Prior to the change in Version 4.4.006 the system was just doing the normal over 40 hours "check".This is now working properly.

For those that had previously shut this custom setting off, you can now use this again.

WinTeam Version History 4.4.004 to 4.4.005

Accounts Receivable

AR Invoice Printing

12421

Corrected issue with the print button that was preventing the Preprinted Invoices from being printed to the printer. This was also an issue with Reminder Notices and Statements and Past Dues.

Work Around: Preview the Preprinted forms first, and then print from the Preview.

WinTeam Version History 4.4.003 to 4.4.004

Accounts Payable

AP Check Writing (NACHA file creation

NACHA Bank Transmission Report

#12331

Added two new custom settings to control the Company Code and the Immediate Origin code included in the NACHA Direct Deposit file. This was necessary for a particular client due to their Bank’s needs.

APNACHA, ImmediateOrigin, “enter value to transmit”

APNACHA, CompanyID, “enter value to transmit”

Payroll

PAY Check Processing Wizard

12328

Change made to the ADP Employee Export program sending through the Employee’s Work State Tax Code as well as a change to a column header (Hire Status changed to Employee Status).

Payroll Reports

PAY Report NACHA Bank Transmission

#12331

Added two new custom settings to control the Company Code and the Immediate Origin code included in the NACHA Direct Deposit file. This was necessary for a particular client due to their Bank’s needs.

NACHA ImmediateOrigin “enter value to transmit”

NACHA CompanyID “enter value to transmit”

PAY Report NACHA Bank Transmission

#11674

Added a Transmission Header record Bank One required in the ARP file format. This information will come from the Additional Information field of the Cash Account Setup screen. If there is a value in the field, this will be used as the Transmission Header record.

PAY Report Unemployment Compensation Tax

12155

Change made to the WA (Washington) UC report format so that salaried employees would have hours calculated for the report since the WA UC report has an Hours Worked field in their format. The hours are calculated as follows:

If the check is a “salaried” check, the hours will be figured as follows:

Weekly payroll check: 40 hours x 1 = 40

Bi weekly Payroll Check: 40 hours x 2 = 80

Semi monthly Payroll Check: 40 hours x 2.166

WinTeam Version History 4.4.002 to 4.4.003

Accounts Payable

AP Print Purchase Orders

12249

Corrected issue where the Print button did not want to print. This issue related to a setting in the report that was set as “No Printer”. The work around for this issue is to Preview the Purchase Orders first and then print from the Preview.

AP Print Checks - Canadian Clients Only

12299

Created temporary Custom Setting to allow the Date section on the new Canadian Check Format to move up or down.

APCheck, VerticalDATEAdjustment, <value>

Value = .2500 (this moves the section down)

Value = -.2500 (this moves the section up)

Accounts Receivable

AR Invoice Printing

12271

Changed the hard coded print order for the Total Hours (feature that is available for Personnel Scheduling invoices with a custom setting), so that it will always be 10 more than the greatest Print Order of any line in order to be sure that it is the last line and picks up all Hours.

Human Resources

HR Benefit Wizard

#12220

Change so that if the Hours Date Range entered is outside of the valid dates of data entry, that we allow, but give the following warning message to allow you to bypass:

Payroll

Check Processing Wizard

12192

Made some adjustments to the ADP Windows outsource payroll option that is particular to one client. Now instead of using a 1 character code for their Hours Types that are exported, we changed to use the 3 character code ADP wanted for this client. They use the following custom settings in order to get their format created properly.

CPWIZ DMSIExport Yes

CPWIZ ADPExport Yes

Payroll Print Checks - Canadian Clients Only

12299

Created temporary Custom Setting to allow the Date section on the new Canadian Check Format to move up or down.

LaserPRCheck, VerticalDATEAdjustment, <value>

Value = .2500 (this moves the section down)

Value = -.2500 (this moves the section up)

Employee Pay Rate Creator

Added a new program allowing you to create Pay Info records automatically for a group of employees that are getting the same type of pay increase. It can be accessed from the Payroll Options menu.

Personnel Scheduling

PS Rollover

12169

Improved processing speed of the Rollover process when the time period being rolled over included a Holiday.

Report - Scheduling Activity

#12248

Corrected issue so that the check for the $0.00 pay rates is only done based on the Jobs that you have selected for printing. Previously, it was including other jobs that were not part of the criteria for printing.

Report - Scheduling Activity

#12246

Added new option to “Exclude Salaried Hours”. This is unchecked by default. If this option is checked, any cell that has a salaried employee scheduled will be excluded from the report. This is an option that normally would not be used except in those cases where a company might be wanting to run a full company report to review their Average Labor Rates and Bill Rates. Since salaried employees pay rates might be $0.00 in the Schedule, this would throw off and distort these figures.

Report - Bidding

12214

Corrected the consolidated reports' Cleanable Amount since it was not adding the buildings cleanable amounts up correctly.

TB Report - Workloading

12215

Corrected the Workloading consolidated pages that show total staff required since this was being calculated incorrectly.

Core, Defaults, Security, and System

Core

4997

Corrected issue with the Job Range in the tier control so after entering From job number and tabbing, the To Job Number will be highlighted for easy editing if necessary.

Customer Balance Posting

11383

Enabled the Job Quick Lookup in each grid row of the Customer Balance Posting screen.

Payroll Defaults

11070

We will no longer allow the First day of the pay week to be changed if there are Personnel Scheduling Job Posts set up due to the issues that result in Schedules when this is done. Instead, we will display a message letting the User know that they will have to call TEAM for further assistance.

Payroll Defaults

10687

Added a new check box to the Weekly Hours screen that allows you to identify a custom Overtime Method as being exempt from weighted averaging. This will always default as False. This option allows a company to indicate a specific group of employees as exempt from Weighted Averaging.

System Security Group Setup

11968

Made some changes to our Security Group area and what is included in SYS ALL, SYS Add Edit List ALL, and SYS Defaults / Setup ALL and FA ALL and FA Reports ALL.

System Security Group Setup

12058

New Security Group screen and many new changes.

System Security Group Setup

12060

Enabled the Rollover button on the Group Setup screen. Also, change the menu drop down option from Form Setup to Group Setup.

TeamTime Defaults (Travel Time tab)

10687

Removed the ability to select a non TeamTime Job for Travel Time. A warning message will display and you must select a Job that is set up for TeamTime (in Job TeamTime Attributes).

Accounts Payable

Invoices

11819

Added setting to default the Payment Method to Credit Card when importing AP Invoices.

APInvoices, CCAlways, Yes

Accounts Payable Reports

Added the "Show Report Criteria" check box to the AP NACHA Bank Transmission, Cash Requirements, Check Register, Purchase Order, Use Tax Due, Vendor Activity, Vendor Aging Analysis, and Vendor Master.

AP NACHA Bank Transmission

11975

Only NACHA checks that meet the selected criteria AND have NOT been cleared through the Bank Reconciliation process are included in the transmission.

AP NACHA Bank Transmission

#11546

Created new ARP format for Bank One.

AP NACHA Bank Transmission

11975

Corrected inconsistency with the NACHA Report that is created and the file that is created. The file includes "Cleared" items and the NACHA report does not.

Use Tax Due

11275

Added a Posting Date range to the Category/Records area in order to limit the Invoice picked up by a Posting Date range. Since there could be Payments that are marked as Use Tax Due (applied to Expenses), these will also be picked up if the Check Date is within the Posting Date range entered.

Accounts Receivable

Customer Master File

12075

Enabled Advanced Filtering for Custom Fields 7 - 26.

Invoice Entry

11593

If you add an Other Billing line to a Personnel Scheduling invoice (that is set up in Bill Codes by Job as taxable) to an existing invoice, do not check Tax checkbox if customer is tax exempt.

Invoice Entry

11923

Change so that Users cannot import Unbilled Personnel Scheduling records if the invoice has been posted or partially paid or all paid.

Accounts Receivable Reports

Added the "Show Report Criteria" check box to the Cash Posting Report, Customer Activities Reports, Customer Master Report, Customer Sales Trend Report, Invoice Aging Report, Invoice Register Report, Revenue by Sales Rep Report, and the Sales Tax Report.

Invoice Aging

11207

Added option to Suppress Customer Details.

Invoice Aging

11352

Last Payment Amount has been added to the right of Last Payment Date.

Call Q

Call Q Batches

11711

Corrected CallQ System Canceling issue where employee accepted after batch was canceled.

Call Q Batches

11804

Change so that if a batch is paused you are able to change the desired # of Accepts. Previously system would not allow this if the batch was paused.

Fixed Assets

FA: Master

11776

Changed so that the Label of each custom field can now show a longer description (we allow up to 20 characters now).

FA: Master

11962

We have removed the warning message when entering an Asset Description that already exists since it is quite likely that duplicate descriptions will be more common due to adding the non-depreciable equipment feature to this screen.

FA: Master

12033

If setting up a non-depreciable item (depreciable checkbox not checked), do not have the system check the value in the Minimum Asset Cost that is set up in FA: Defaults since these are always going to be less than that amount.

Fixed Asset Reports

Repair / Maintenance

11976

Added the new Repair/Maintenance Report to security group FA Reports ALL.

General Ledger

Check Register

11363

The GL Check Register screen has now changed when displaying the G/L Balance. If you select a Check Date range of 12 months or less, the G/L Balance will display correctly. (Previously it did not handle year end rollovers correctly and displayed an incorrect Register Balance.) But if you select a date range of 13 months or more, the previous fiscal period

will only display $0.00 for the G/L Balance. The current fiscal period will display the G/L Balance for each record.

Reconciliation Wizard

12157

The initial recon wizard is displaying the incorrect GL balance on the last screen. It should be the Ending balance, not the Net change amount.

General Ledger Reports

Added the "Show Report Criteria" check box to the Budget Income Statement, Budget Income Statement: Current vs Prior, Chart of Accounts Report, Comparative Income Statement, Financial Report Format, General Ledger Detail Report and the Trend Income Statement.

Formatting of Financial Reports

10407

Report Format Details grid has been expanded so more lines can be viewed on this screen.

Trend Income Statement

11675

Corrected issue that was occurring when printing tiers and not checking group or print, there were no subtotals when each month did not have data.

Trial Balance

11468

Added Company Name on the Trial Balance report. Previously was only printing the Company #. Should be reading the Company Name from the Company set up.

Human Resources Reports

Compliance Tracker by Employee

11341

Increased the Score field to display a 5-digit value in the Completed grid and the License/Expiration Code tab grid.

Human Resources Reports

EEOC

11520

Changes made to accommodate the 2007 law changes for the EEOC Report changes.

Employee Master File

10242

Added Show Report Criteria check box to the New Hire Report.

Employee Master File

11600

Added ability to export a Phone List from the Employee Master File report options.

Employee Termination

11589

Change the heading of the report so that the Hire Date Cut Off is formatted with a 4 digit year and not just a 2 digit year. Changed both Summary and Detail.

Inventory

Usage and Resale

11542

Added a UPC column in the import file which allows importing based on the UPC code stored in Inventory items. Item # and Item Descriptions are no longer required in the export file.

Inventory Reports

Added the "Show Report Criteria" check box to Activities by Job/Item #, Item Groups, Item Master Report, Items on Hand, Items Received, and Items to Reorder Reports.

Request Print

11239

Added Vendor lookup button to the Vendor Range in the Category/Records area when printing requests for Purchase Orders/Drop shipments.

Requests

11488

Change made with new inventory budget feature so that those jobs that do not have budgets set up for inventory budgets do not show up on the report. Prior to this, they were showing up on the report as “over budget” (only because there are no budgets set up for them.)

Job Costing

Job Master File (Tier Descriptions tab)

11351

Tier Descriptions
Changed so that WinTeam now looks at the User's Basic Read security level when determining the Employees that can be assigned to a Tier Description.

Job Master File

11833

Changed name of the Location ID field in the Job Master File to be just ‘Location’.

Setup Pager

11231

Switched the order of the Pager Type and Pager Number columns due to formatting issue when changing the pager Type.

Work Schedule Details

11295

Scheduling by Job
The Schedule Details grid will now display in ascending date order (oldest date on top, most current on bottom).
Added ability to sort any column in ascending or descending order in the Schedule Details grid.

Job Costing Reports

Added Report Criteria check box to the Job File Report and the On Screen Job Cost Report.

Job Master File

11689

Resolved automation error that was occurring when exporting report using the Job Number, Name, and Tiers only option.

Job Master File

7967 and 11689

With the new Crystal 11.2, the issue with exporting the Job File Report for Job, Name and Tiers only is now working properly and will create the proper pdf.

Payroll

ADP Tax Filing

11470

Removed the "Both" option under W-2 Output Indicator since ADP no longer allows this. You must choose iPay or W-2 printed.

ADP Tax Filing

11307

Need to change so that we consider any User a Security level of a 9 when running the ADP Tax Filing reports and creating the files for ADP. We do not want to look at the actual Security level any more since it's too easy to miss.

Check Processing Wizard

11378

Created new payroll outsource option for Infinium and Uptipro.

Check Processing Wizard

11472

Need to chg the ADP outsource PR option and send thru the national origin code as blank. Also change the position of the extra State W/H $'s to be after the work state.

Check Processing Wizard

11611

Created setting will create the Ceridian Payroll Export file to be in a special format, not the standard Ceridian format.

Check Processing Wizard

12189

PR Outsource ADP TK hours export - made some minor changes to the CPWIZ, DMSIExport and CPWIZ, UseDiffJobNumber custom settings. Client wanted Custom Field 7 of Job File to come through as Job #.

Employee Master File

11205

Added Custom Setting to automatically clear (uncheck) the TeamTime option on the Employee Master File (Other Info tab) when adding a new Employee.

Employee Master File

11400

Created a new custom setting to change the name of the Benefit Category field label to be whatever the company would like it to be (i.e. Vacation Category).

Payroll, BenefitCategoryDescription, “enter your description” .

Employee Master File

11818

Added Benefit Class ID Column to Pay Info History Title ACB.

Employee Compliance Tracker

11341

Able to enter a score higher than 255 in the License tab section. Also if you key in a score, it blanks it out, then get an automation error on license tab.

Employee Compliance Tracker

11484

The Score field has been changed so that you can enter a score (number) up to 99999.

Employee Other Compensations and Deductions

11559

Added the User Added and Changed information to this screen in order to see who added and last changed a particular line item.
Changed the Other Comp/Ded screens to 1024 x 768 to utilize the additional space that was needed for these new fields.

Permanent TimeCards

11670

Changed so if a User does not have Basic WRITE rights to the security level of an employee, we no longer allow them to add or change permanent time card info. In previous versions they could change this information.

Print Checks

11610

Added Custom Setting to print the Primary Job Name and Number on top of the paycheck. This setting applies only to the Framed Sections format.

LaserPRCheck, PrintPrimaryJob, Yes

Print Checks

11539

The existing custom setting for printing the Distribution Code and Description in the check area has been altered to also have additional functionality for Framed Sectioned checks.
This setting will replace the Employee Type information that is normally printed in the stub area of the framed sectioned format with the Employee Distribution information. If the Group By selected is by Primary Job Site, the Primary Job Site information will print, otherwise it will always be the Employee Distribution.

LaserPRCheck PrintDistCodeDescription Yes

Print Checks

11318

Changed existing Custom Setting to allow VOID message to print on all pay check formats (except Legal size).

Print Checks

10946

When exporting the ADP Check print file on ASP, the default folder that it will always go to will be y:\winteam\data1 folder. If you have more than one company, the 1 will be replaced with appropriate company number

Print Checks

11832

New ADP Check format was created for a specific client.

Payroll Report

NACHA Bank Transmission

11546

Created new ARP format for Bank One.

NACHA Bank Transmission

11547

Corrected issue with the Company Pick From List not limiting the employees when doing pre-notes.

NACHA Bank Transmission

11674

ARP Transmission Header added to the Bank One format. (The header info comes from the Cash Account's Additional Information field.)

Employee W-2

11597

Changes made to the state of Kansas W2 magnetic media format.

Employee W-2

11703

Other Comp- Include in SS Tips on W-2 is printing the incorrect amount when a check is voided.

Other Compensation or Deduction

11720

Sped up the Other Compensation and Other Deduction reports when running the report based on Check History information.

Payroll Check History

12086

Corrected issue that was occurring when using Sort by Employee Name- when 2 people have the same name except for MI, the Totals (x Checks) is combining both EE check totals together.

Payroll Check History

12110

On NY Disability report, widen all of the amount fields to handle million dollar amounts.

Unemployment Compensation

12117

State of Florida has changed their State UC format to an html format. This new format must be used beginning with 2nd Quarter report 2007 (reporting deadline 7/31/07).

Unemployment Compensation

12005

Change made to the Colorado UC magnetic media file format for electronic reporting.

Unemployment Compensation

12087

The PA UC file is now created as a .csv file which is how the state expects this to be sent. You no longer will have to rename.

Unemployment Compensation

12149

Changed the calculation of the monthly employee count to include counting any employees that had tax adjustments during that particular month. Previously would only count them if there was a PR Check.\

Personnel Scheduling

Bill Codes by Job

11375

Added a new check box to this screen that enables invoices to be created using the Job Name and Address information instead of the Customer Name and Address as the Bill To information.
This can be useful if you have multiple Jobs that are serviced by a customer and the customer prefers that the invoices be sent directly to the Job site for approval.

Bill Codes by Job

11594

Changed to default the Tax check box as selected if the Job is set up to tax Services.

When setting up Other Billing items, if the Job is set up having Services checked for "Sales Tax Normally Apply", default all of the Other Billing line items so that the tax field is checked when they are being added.

Detail Cell Information

11355

Shift + F2 Zoom functionality is now available for CID MM In and Out fields on the Detail Cell Information section. This will allow you to see the entire field description.

Post Watch

10941

Added Read Only security to Post Watch. The Post Watch screen now has Read Only security. Set up the Post Watch screen to have Read Only security in the Group Security setup screen. The Read Only option for the Post Watch screen still allows users to change the Tier Pattern Template, Hours for which shifts display on the screen, Exceptions Only check box, and the Auto Refresh Option. Users also have access to the Go To, View, and Requery Options and shortcut keys. All Edit options are disabled, as well as Detail Query. Read only Users are prevented from changing any data on this screen.

Post Watch

11652

Added functionality to access Post Watch from the PS Options menu.

Post Watch - Review Changes

12109

Need to add the time to the date changed on the report. 00:00 am/pm - that way they know when the change was made.

PS Rollover

11473

The Location Pick From List is not limiting the rollover for the locations selected. Rolling over jobs in other locations.

PS Schedules

11598

Added Custom Setting to include Special Add On's to the calculated Pay Rate. This Custom Setting will add into the calculated Pay Rate any Special Add On that is set up in the Hours Category Details. Normally this would never be taken into account.

PersonnelScheduling, IncludeSpecialAddOn, Yes

PS Schedules

11086

Overtime Method 9 is a method exempt from overtime. Because of this when scheduling, the system needs to not consider them for OT since their OT Method is a 9.

PS Schedules

11781

Corrected issue with closing the Schedules screen when the Update Schedules is still open or minimized.

PS Wizard

11478

Problem with batch cell info link table getting populated when using the Include Shift Times option in the Bill Codes by Job area.

Personnel Scheduling Reports

Bill Codes by Job

11859

Corrected this report so that the Notes field is kept separate than the other header information on the line to prevent issue with Notes printing over and over on each page when a Job’s details went over to another page.

Timesheet by Job

11825

Created Custom Setting to triple space between records on the PS Timesheet by Job Report.

PSReports, TripleSpace, Yes

Timesheet by Job

11825

Created Custom Setting to sort the report in Employee Name order instead of Employee Number order.

PSReports, SortbyEmployee Name, Yes

TeamBid & Work Scheduling

Work Schedules

11619

New Supervisor field is available in the Advanced Filter to use.

Work Schedules (Who tab)

11421

Added functionality to select a Supervisor for Work Schedules. This is not required.

TeamBid & Work Scheduling Reports

Bidding

1695

Corrected the consolidated Cleanable amount to display the correct total when there are several buildings.