QSSUG Finance/Personnel Committee Webinar

Employee Maintenance

January 29, 2020

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Feature Discussion

Feature Discussion

- Ability to build and work with a list of employees
- Ability to save and recall employee lists
- Navigation tools for employee lists
- Multiple choices for searching and retrieving employees
- Flexible settings for an individual experience
  - Employee…
  - Auto-highlight required fields
- Local configuration options
  - Favorites
  - Hot Keys
  - QuikPeeks
  - Configure Search

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Feature Discussion (continued)

- Personnel dataforms

- Professional dataforms

- Position Control dataforms

- Payroll dataforms

- Navigation Tools

  – Default Home Field

  – Custom Home Field

  – Region Home Fields

  – QuikTab Fields

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Main Form

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Employee Maintenance – Main Form

Employee Search

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Employee Search – Simple
SSN, Ext Ref, Name or ID

Employee Search – Settings
SSN, Ext Ref, Name or ID

Employee Name Search – Help

Employee Search Help

Employee search tips

Print Close

The general format of a name search is :

LastName[, FirstName]

LastName (R):

You can search for employee last names by any of these methods:

SEARCH TYPE	EXPLANATION
Soundex	Type a last name, such as PETERSON. The search matches the name you typed, as well as other similar sounding names, such as PATTERSON, PETERS, PETERSEN, AND PETERKIN. For this and all other searches by name, the names are _not_ case sensitive. In other words, all of the following are the same: PETERSON, Peterson, peterson, and pETERSON.
Exact Match	To search for an exact match to a last name, type the complete name, followed by a space and a slash (/). For example, type the following to match only the last name PETERSON: **PETERSON /** Be sure to type a space between the end of the name and the slash.
	You can combine an exact match and a soundex search, as in the following example: **LAR/SON**

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Employee Search – Advanced

Employee Search – Advanced (cont.)

Employee Search – Advanced (cont.)

Employee Search – Import

Employee Search – Import (Cont.)

Employee Search – Import (Cont.)

Employee Search – Import (Cont.)

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Employee Search – Import (Cont.)

Employee Search – Configure Search

Employee Search – Configure Search (Cont.)

Employee Search – Add to grid

Employee Search – Grid Output

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File Options Window Help Videos Hot Keys

Search complete. 1 record(s) found.

Personnel
— Demographic (MA)
— Termination (TE)

Search Panel

By SSN | By Ext Ref | By Name | By ID

District : 39 ▾   ☐ Include Terminated   ☑ Add to grid

Grid Output

File Options

	Name	History Name	Preferred Name	Dist	External Ref	G	Ty	Site	BU	RC	LG	Terminated	Work Phone
▶	COOPER, REALLIE		SNIKSTER	39	001003	M	FT	0002	04	02	AV		555-1212 x143
	PAIN, TRUE			39	001006	F	FT	0026	04	02	AV		(650)372-0200
	PERCOX, DEWAYNE		DAPMAN	39	001004	M	FT	0002	02	02	AV		
	PERSON-SMITH, DARRYL			39	001002	M	FT	0001	04	02	AV		(650)372-0200 x608
	TESTER, IMA			39	001007	M	FT	0000	01	00	AV		
	TROUBLE, REAL			39	001005	M	FT	0015	04	02			(650)372-0200 x608

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File - Settings

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File – Settings …

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Settings – Employee…

QuikPeeks

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Settings – QuikPeeks
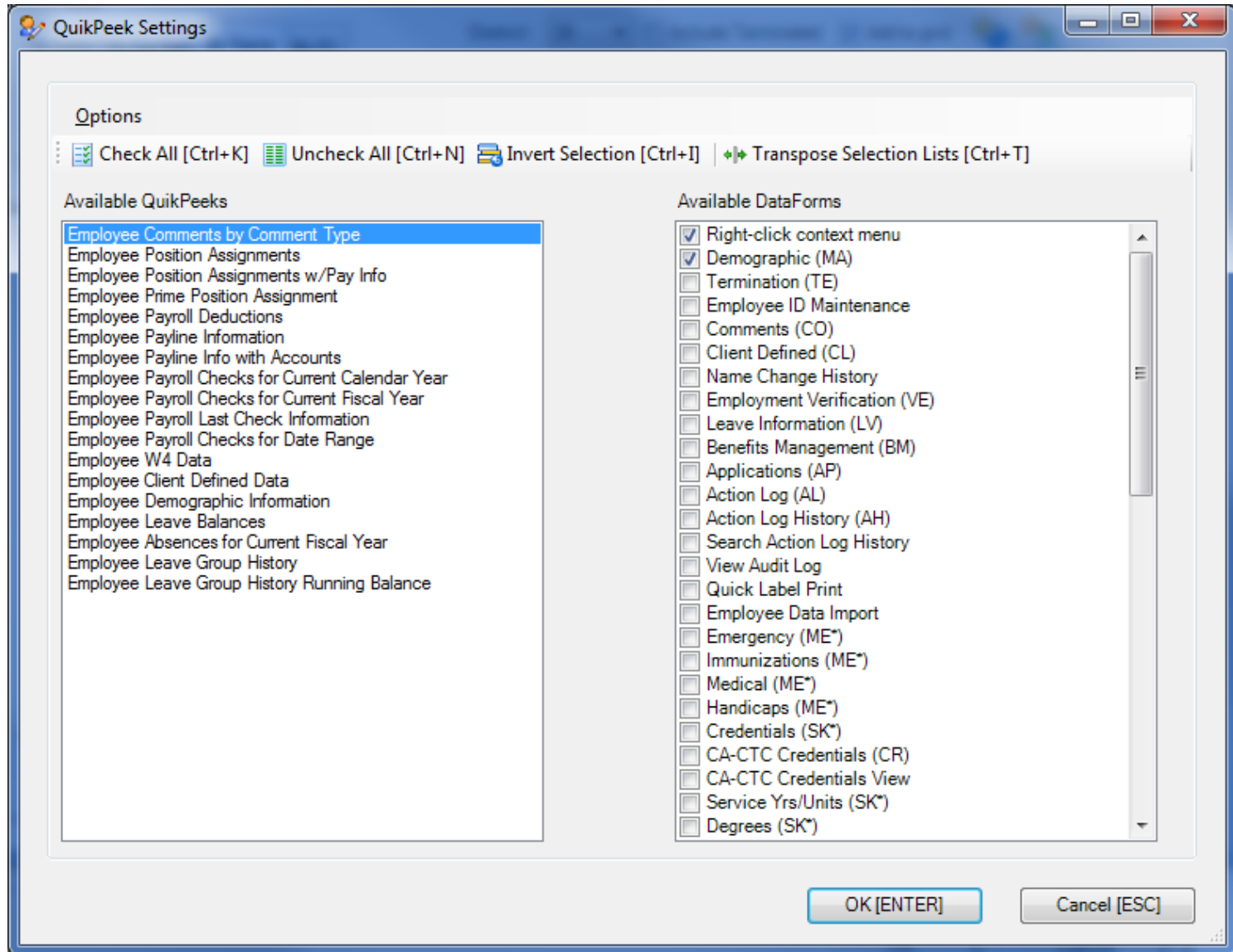
Settings – QuikPeeks
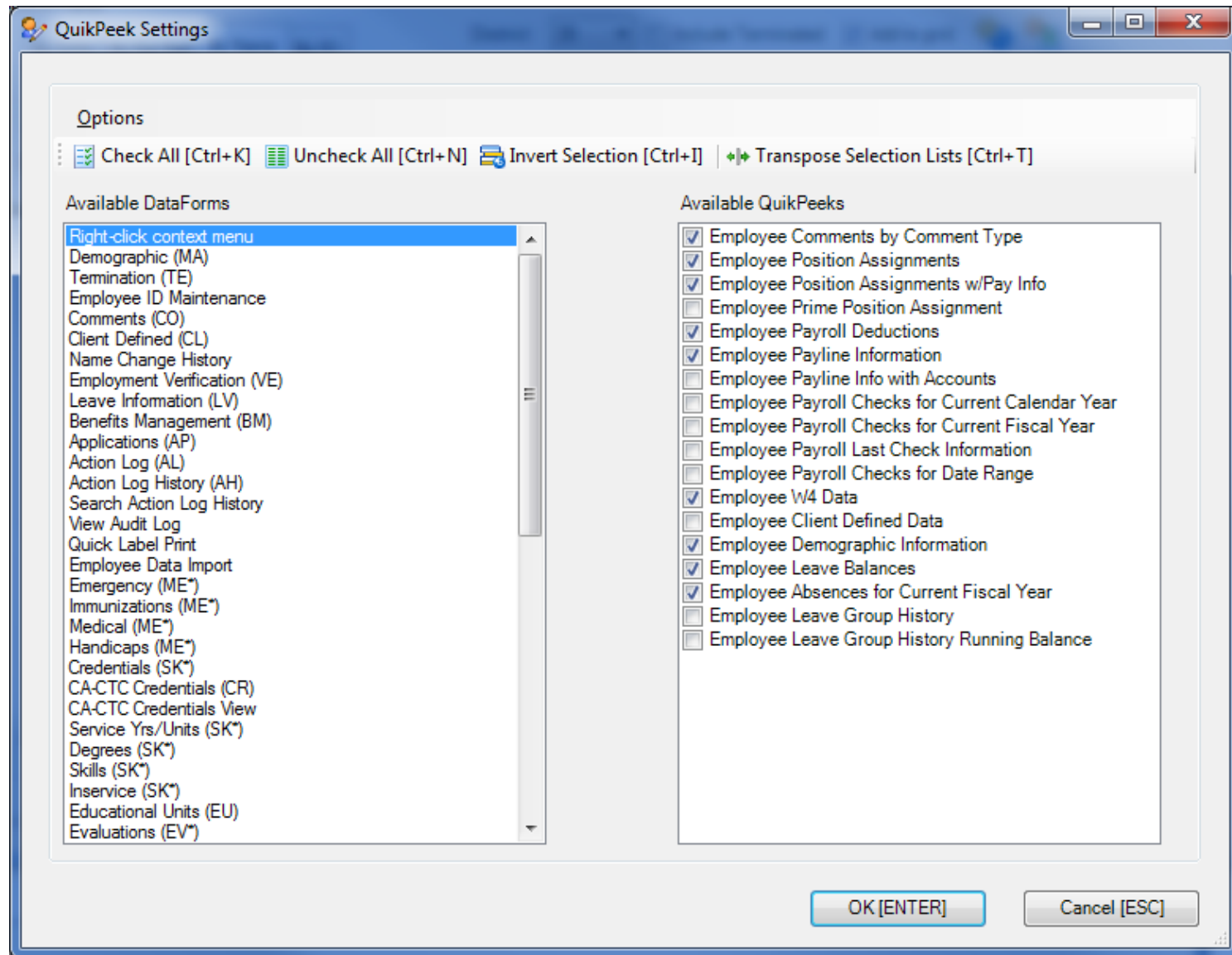
Employee Maintenance – QuikPeeks

Highlight Required Fields

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Settings – Auto-highlight required fields

Employee Maint. MA – w/required fields

Favorites / Hot Keys

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Options – Enable Favorites

Adding forms to Favorites

Employee Maintenance – Favorites

Employee Maint. – Adding Hot Keys

Employee Maintenance – Show Hot Keys

Employee Lists

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Edit Employee Lists

Edit Employee Lists (cont.)

Employee History Lists

Payroll History

Basic Features

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VCR buttons

Employee Demographic (MA)

Name Change History

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Add New Employee

Add New Employee

Add New Employee (cont.)

Add New Employee (cont.)

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Change SSN

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Change Employee SSN

Other Features

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Employee Maintenance – By ID

Termination (TE)

Quick Label Print

Navigation Tools (MA)

Navigation Tools (MA) (continued)

Navigation Tools (MA) (continued)

Navigation Tools (MA) (continued)

Navigation Tools (MA) (continued)

Navigation Tools (MA) (continued)

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