



Evolution Payroll Icons / Buttons



Overview

This guide describes the following Evolution Payroll icons / buttons:

- Dashboard tiles:
 - Payroll Today tile icons/buttons
- Employees screen icons/buttons
- Payrolls Timeline icons and status indicators
- Payroll Entry grid navigation buttons
- General icons/buttons

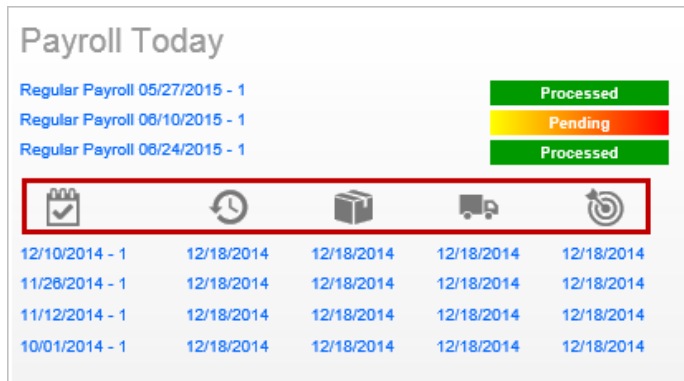
Dashboard Tile Icons/Buttons

The following tables describe icons/buttons found on the Evolution Payroll Dashboard tiles:

- Payroll Today tile icons / buttons
- Task Queue tile icons / buttons

Payroll Today Tile Icons/Buttons:

The Payroll Today tile on the Evolution Payroll Dashboard,



may contain the following icons/buttons (if set up with VMR):

Icon	Description
	Check date of the listed payrolls
	Processed date of the listed payrolls
	Packaged date of the listed payrolls
	In Transit date of the listed payrolls
	Delivered date of the listed payrolls

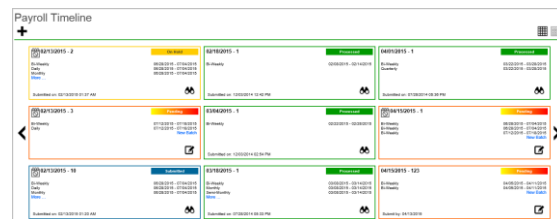
Employees Screens Icons/Buttons

The following table lists the icons/buttons found on the Employees screens.

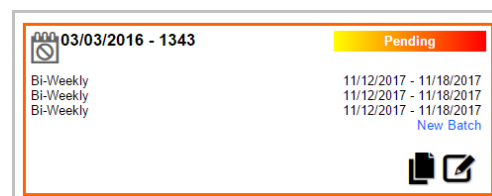
Icon	Description
	Add a New Employee
	Delete an Employee
	Employee (Form) View
	Table View
	Save Changes
	Cancel Changes
	Show Audit History
	SwipeClock application
	View Validation Errors
	Scroll Left
	Scroll Right
	Export CSV (Excel)
	Check ID (on the Add Employee dialog)

Payroll Screens Icons/Buttons

The first screen in the Payrolls menu is the Payroll Timeline, which displays a card-like view of scheduled payrolls.




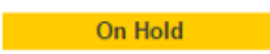




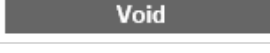
Close-up of a Payroll Timeline card view of a pending payroll:



You can click the Edit payroll icon  to make changes to a payroll.

Payroll Timeline Status Indicators

On the Payroll Timeline, color indicators specify the status of each listed payroll batch.





Icon	Status
	Payroll not due to process yet
	Payroll on-hold for review by service bureau
	Payroll submitted to service bureau for review
	Payroll processed
	Payroll started but not submitted
	Payroll is past due
	Payroll voided

Payroll Entry Grid Navigation Buttons

The Payroll Entry grid has the following navigation icons / buttons in the top-right header area of the screen:







Note: A green-colored button is a visual cue for the user to indicate which screen/step they are looking at in the overall payroll process.

Icon	Status
	This button is active (green) while batches are being created. Click this button to view batch information after they have been created.
	This button is active (green) while checks are being created. Click this button to view, add, or edit checks after they have been created.
	Click a payroll to view or edit payroll calculations. Click to calculate totals when checks have been added or deleted from batches.
	This button is active (green) while payrolls are being finished and submitted for review or processing.









Payroll Timeline – Table View Icons










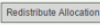




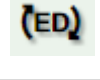

Payroll Timeline



Icon	Description
	Click to edit a payroll
	To access SwipeClock application
	Select a payroll & click this icon to copy a payroll
	Click to access the Block E/Ds screen





The Payroll screens may display the following icons/buttons:

Icon	Name	Description
	View	Available only for processed payrolls. Click to display payroll details (batches, check lines, etc.)
	Edit	For payrolls that have been started but not processed (Past Due or Pending). Click to make changes to a payroll, add a new batch, filter information differently, or add a new check(s).
	Create a New Payroll	Click to add a new batch to scheduled payrolls.
	Delete a payroll not currently in place	Available for all payrolls except processed payrolls. Click to delete a scheduled payroll.
	Payroll Settings	Click to open the Payroll Settings screen where Batches are created & parameters set.
	Payroll Entry	Click to open the Payroll Entry grid.
	Folder	Click to open the Check Lines screen to view or edit a payroll.
	Pre-process, Calculate, & Review	Click to preprocess for payroll. Click this icon to display the Pre-process screen. Click the Calculate button to perform the function itself.

Icon	Name	Description
	Payroll Process	When viewing or editing a payroll, click to display the Finish Payroll screen. You can then submit (or resubmit) the payroll or submit it for SB Review.
	Copy Payroll	Copy the selected payroll.
	Email Payroll Processor	Click to email a note about payroll.
	Not Scheduled	Indicates a payroll that is not yet scheduled.
	Card View	Click to change the view to a card view from the grid view.
	Grid/List View	Click to change the view to a grid / Table list from the card view.
	Choose Columns	On the Payroll Entry grid, click to choose columns to show or hide.
	Recalculate Check	On the Payroll Detail View, click to recalculate the employee's check after making changes.
	Preview ALD	On the Payroll Detail View, click to view ALD info for the employee's check (disabled for processed payroll & only available for employees set up with auto labor distribution).
	Redistribute Allocation	On the Payroll Detail View of a processed payroll, click to display Redistribute Allocations.
	Note	On the Payroll View screens, to the left of an employee name, indicates an employee has notes. Click to display the Notes flyout.
	SwipeClock	On the Payroll View screens, click to access the SwipeClock application.
	Reset Columns	On the Payroll Summary View screen, click to clear & reset the columns back to the default column settings.
	Refresh Scheduled EDs	On the Payroll screens, click to have the system refresh the Scheduled E/Ds back to originals.
	Refresh Scheduled EDs (Batch)	On the Payroll Batch screen, click to have the system refresh the Scheduled E/Ds for the Batch.
	Block E/Ds	On Payroll screens, click to block E/Ds from payroll.











Menu Bar Shortcut Buttons

The following shortcut buttons are available on the menu bar on the left side of the screens.

Button	Description
	On the Employees menu item: click the calculator shortcut button  to display the Check Calculator tool on which non-payroll employee checks can be calculated from Gross-to-Net or Net-to-Gross. Once the check has been calculated it can be sent to an existing payroll batch or a new payroll/batch can be created.
	On the Payrolls menu item: click the magnifying glass shortcut button  to display the Check Finder tool.

General Icons /Buttons

The following general icons/buttons appear on various Evolution Payroll screens. Note that the precise function of the icon may vary depending on the specific screen on which it is located.

Icon	Description
	Click to logoff Evolution Payroll.
	Show Task Queue
	Click the Left and Right arrows to display more information or to change the view.
	Click on the small arrow icon to expand information for the selected item. For example, on the Scheduled E/Ds screen to display information about the selected code. You can also just double-click on a row to display the nested details.
	Click to save information you entered or changed.
	Click to cancel your changes.
	On the Employees screen, click to change to a Table (grid) view from the Form view.
	On the Employees screen, click to change to a Form view from the Table view.
	On the Check Batch Settings screen – click to return to the Check Batches screen.
	On the Check Batch Settings screen – click to display the Check Batch Settings screen listing the company employees.

Icon	Description
	On the Batch Checks screen, click to display the Check Batch Settings screen.
 Totals	On the Payrolls header, click to access the Payroll – Calculation Results screen to review totals of earnings, deductions, & taxes.
	On the My Task Queue, click to refresh the list of tasks.
	On the Defined Reports screen of the Reports module, select a defined report and click this button to select the report parameters. Also on the Ad Hoc Reports screen.
	On subsequent Defined Reports screen tabs, click this button to return to the page of the Report Generation screen – the list of reports to select. Also on the Published Reports Preview screen, to return to the report list. Also on the Ad Hoc Reports screen.
	On the Published Reports screen, click this button to see a preview of the report.
	On the Task Queue, click to download a report.
	On the Task Queue, click to download multiple reports to a Zip file.
	On Employee module screens, click this button to export data in the grid to Excel.

Reports – Ad Hoc Reports Screen Icons

The following icons are at the top left of the Reports - Ad Hoc Reports screen:

Ad Hoc Reports

	Add a New Ad Hoc report.
	Save changes made to the Ad Hoc report.
	Cancel changes made to the Ad Hoc report.