

Help Manual



# BillQuick HR Help Manual

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*Built With Your Industry Knowledge*

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## WELCOME TO BILLQUICK HR 2013

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BillQuick HR is a comprehensive human resource management tool that enables you to manage your human resources in a simple and effortless manner. With modules specifically designed with your HR needs in mind, BillQuick HR merges with the standard human resource practices, giving you the flexibility to customize the features to your specific needs. BillQuick HR is a Windows-based human information system which allows you to proactively track and monitor all your employee information. The product merges with the HRM process of your organization, allowing you to keep a documented track of the activities. BillQuick HR is enriched with features such as employee health benefits, salary administration, attendance maintenance, and benefits tracking. Thus, it provides a simple yet powerful way for business owners and managers to effectively manage their resources and keep track of their accrued benefits.

While BillQuick HR is a stand-alone application, however it does [integrate with BillQuick](#) which is a time billing and project management software.



Your feedback helps us plan and improve BillQuick HR releases and associated documentation. Please e-mail your comments, suggestions and ideas about BillQuick HR and this Help to [BQ-Ideas@bqe.com](mailto:BQ-Ideas@bqe.com).



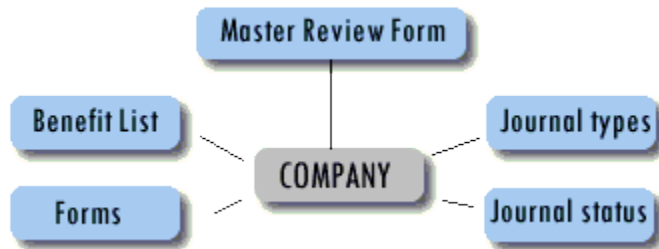


## INTRODUCTION

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### FUNCTIONAL OVERVIEW

BillQuick HR works on the lines of a typical human resource system used in any organization. The modules are organized in terms of company and employee. Each company has associated modules (see diagram below) which store information on benefits, journal types (e.g. education, training, warning or any other information type), employee review (e.g., performance grades) and other related details. These are then assigned to employees.



BillQuick HR provides modules to keep track of information specific to all employees (see diagram below). This includes contact information, changes in salary over the period an employee has been working, benefits provided by the company to the specific employee, how they have been utilized by the employee and so on.



To make sure that BillQuick HR meets all your HR needs, it comes with reports that can be generated instantly for specific employees or for the company as a whole. Also, BillQuick HR allows you to print the HR forms required by the federal/state government in a matter of just a few clicks.

Please go through our feature list to know what BillQuick HR can do to help you work efficiently. You might also want to go through the [BillQuick HR Tutorial](#) that would help you get started.

Thank you for purchasing BillQuick HR!

## KEY FEATURES

BillQuick HR is a simple yet powerful tool for business owners and managers. With BillQuick HR you can do the following:

- Maintain employee related data such as their profile, address, phone numbers, etc.
- Maintain a list of contacts for the employees including emergency contacts.
- Maintain salary history and payroll-related data for the employee.
- Maintain a list of benefits offered by the Company and monitor the usage of these benefits.
- Maintain a complete history of performance reviews for employees.
- Maintain a Journal to record all employee-related activities (e.g., employee won an award, employee received an oral warning from the supervisor, etc.).
- Maintain a list of incidents (e.g., claims and work-related accidents).
- Print employee-related forms (e.g., recruitment, hiring and payroll withholding).
- Maintain employee photos.

In addition, BillQuick HR simplifies your human resource management experience by:

- Providing a way to measure an employee's earned vacation and sick time, and compare it with used vacation and sick time for any given period.
- Giving you the ability to record an employee's review and be able to generate reports of all the previous reviews as well as compare them with other employee reviews.
- Enabling maintenance of employee journals so you can keep track of all employee-related items such as degrees, achievements, warnings, skills, etc.
- Keeping track of a list of employee incidents such as accidents, injuries, etc.
- Helping you maintain employment history.



You might want to read through the [BillQuick HR Getting Started Guide](#) to get started with the program.

## CONTACT INFO

BQE Software Inc. is a California based C Corporation, founded in 1995. It first introduced its flagship product, BillQuick, in May 1996 and since then BQE has developed a host of applications and solutions for your specific needs.

You can contact us for information about the latest products and services; ordering products; training and consulting; technical support; report customization or any other business query.

## CORPORATE OFFICE

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<b>BillQuick Blog:</b>	<a href="http://blog.bqe.com">blog.bqe.com</a>
<b>User Forum:</b>	<a href="#">BillQuick Yahoo Group</a>
<b>Services:</b>	<a href="http://www.bqe.com/Services">www.bqe.com/Services</a>

## SALES

Contact our sales representative for information about the latest products and services.

<b>Telephone:</b>	<b>888-245-5669 (Within USA)</b>
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<b>Order:</b>	<a href="http://www.bqe.com/store">www.bqe.com/store</a>
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<b>Office Hours:</b>	8 AM to 5 PM Pacific Standard Time

## TECHNICAL SUPPORT

For technical support, you can contact our Support Team. Before you call, email or fax us, please provide the following information for the fastest possible service:

- Product serial number (registration number)
- Your name, company name and phone number
- Exact product name and version number (To find the version of BillQuick, click Help, About BillQuick)
- Type of operating system (e.g., Windows XP)
- Complete description of the issue, including steps to reproduce it
- Exact wording of any messages displayed when you encountered the problem
- Steps taken to resolve the problem
- All previous email threads with BQE Software about the issue, if any

<b>Telephone:</b>	<b>(310) 602-4030</b>
<b>Knowledge Base:</b>	<a href="http://www.bqe.com/BillQuickKB">www.bqe.com/BillQuickKB</a>
<b>Email:</b>	<a href="mailto:support@bqe.com">support@bqe.com</a>
<b>Fax:</b>	310-784-8482
<b>World Wide Web:</b>	<a href="http://www.bqe.com/Support">www.bqe.com/Support</a>
<b>Hours:</b>	7 AM to 3 PM PST

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<b>Support Hours:</b>	Monday to Friday 8 AM to 1 PM GMT



## START UP

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### SYSTEM REQUIREMENTS

For successful installation and implementation of your BillQuick HR software, be sure your computer systems meet or exceed the specified hardware and software requirements. Read the [BillQuick HR Getting Started Guide](#) for details or check our [website](#).

### INSTALLATION

Installation of the BillQuick HR software is explained in the [BillQuick HR Getting Started Guide](#).



Before installing the software, please read the [End User License Agreement \(EULA\)](#).

Once installation is complete, you will see a BillQuick HR icon on your desktop. To start the BillQuick HR application, do one of the following:

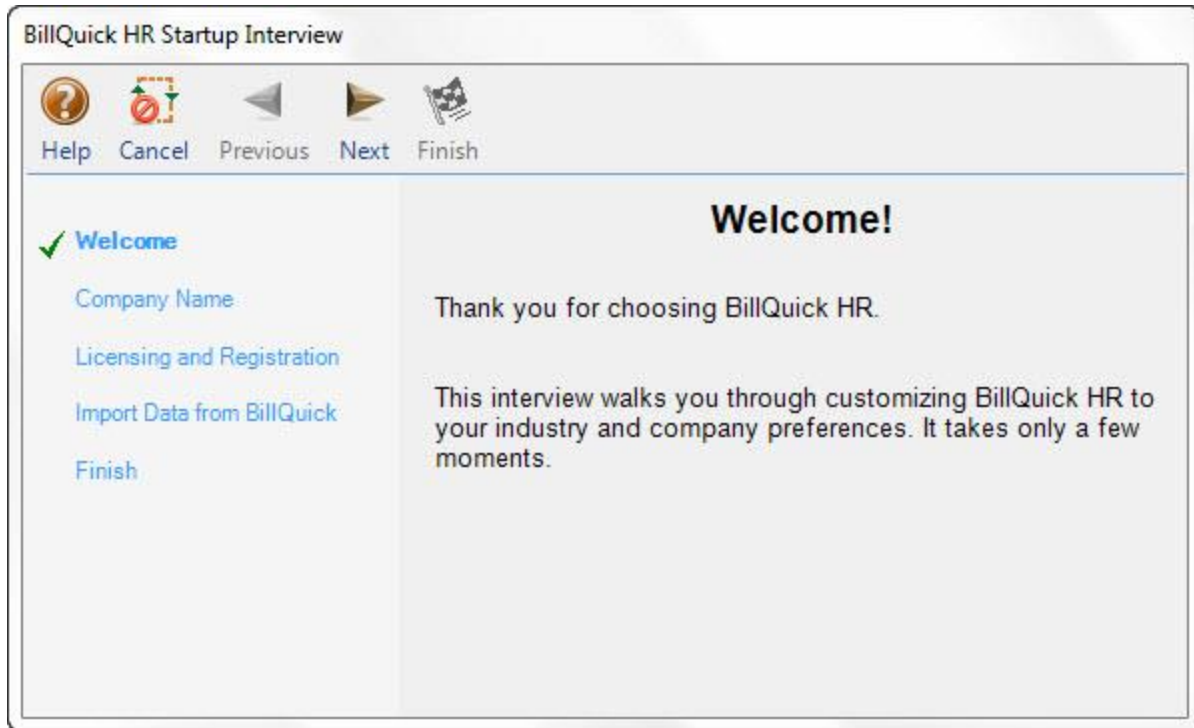
- Click the **BillQuick HR** icon on your desktop.
- From the Windows **Start** menu, select **Programs, BillQuick HR**.

### BILLQUICK HR STARTUP INTERVIEW

The BillQuick HR Start-Up Interview is a tool that automates the basic setup tasks. This wizard walks you through the steps of setting up basic company information, entering your license and registration keys and importing data from BillQuick.



Settings specified here can be modified later in Global Settings, [User Preferences](#) and other screens.



**Welcome:**

This first screen is an introduction to the Startup Interview.

**Company Name:**

The Company Name displays on all invoices and statements. Enter the company name exactly as it appears in the licensing and registration instructions. Do not change the spelling, spacing or punctuation. Company Name must be identical to the name provided to BQE Software when purchasing your license. It is encoded into all license keys. If you are evaluating BillQuick HR, enter any company name you wish.

**License and Registration:**

If you have purchased BillQuick HR, enter your License and Registration Keys here - exactly as you receive them through the mail. If you enter an incorrect license or registration key, a message will ask you to continue or correct it. If you are using the free evaluation trial, these fields maybe left blank.

**Import Data from BillQuick:**

You can import your employee information from BillQuick into your BillQuick HR Company file. The data transfer utility sends employee name, and sick and vacation hours to BillQuick HR. This saves a lot of time in manual setup of basic employee information. Select Yes if you want to import data. You can choose to import only employee data, or also import the entitled sick and vacation hours of the employee.

If you choose Yes on finishing the startup wizard, [Data Import](#) screen appears.



### **BillQuick HR Startup Interview Button Panel**

**Help:**

Opens the BillQuick HR Help.

**Cancel:**

Discards any user-selected settings, terminates the process and closes the wizard screen.

**Previous:**

Returns to the previous page, allows you to modify any previously entered company information.

**Next:**

Moves to the next page in the sequence and maintains company information that you provided in the previous page.

**Finish:**

Applies user-selected company information from all pages and completes the task.

## PRODUCT ACTIVATION

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After installing BillQuick HR, you are prompted with the **Product Activation** screen. For continued use of BillQuick HR in evaluation mode, click **Activate Later**. If you would like to use BillQuick HR beyond the evaluation period, activation is required.



The Product Activation screen provides four options.

### **Activate Now**

If you wish to evaluate BillQuick HR before making your purchase decision, you can use BillQuick HR in evaluation mode by clicking on Activate Now option. You will be asked to enter your company name, address, phone number and email address. Once done, the evaluation key will be sent to you.

You can also get a free evaluation key via email, phone or [Internet](#).

### **Activate Later**

You have an option to activate the BillQuick HR program to start the 30-day evaluation period. Else, you can activate the product later. Activating the product later starts a 7-day free trial during which the product can be activated for 30-days or purchased for unlimited use.

### **I am ready to buy**

This option takes you to the [BQE website](#) where you can purchase the license and registration keys for BillQuick HR. You can also purchase the keys by calling 310-602-4020

or emailing [sales@bqe.com](mailto:sales@bqe.com). The license key is based on your company name, and hence, if you change your company name or the number of authorized users, a new key must be obtained. Registration is based on product code and hence to be done once per user.



Licensed and evaluation software may run together.

### Already Purchased

If you have already purchased BillQuick HR, enter the exact License Key and Registration Key provided to you. The license key is based on your company name, and hence, if you change your company name or the number of authorized users, a new key must be obtained. Registration is based on product code and hence to be done once per user.

For more information, call (310) 602-4020 or visit [www.bqe.com](http://www.bqe.com).



A warning message displays if validation or registration fails. Re-enter the key correctly. If the problem persists, contact BillQuick HR Support at [support@bqe.com](mailto:support@bqe.com)

## BILLQUICK HR LOGIN

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If [security has been enabled](#), all BillQuick HR users will be prompted for a login using their **User ID** and **Password** when opening the application. By default, BillQuick HR assigns the user's initials as the User ID and Password. The BillQuick HR Supervisor can change these, if desired.

You may always log in with the default User ID and Password, *Supervisor*. If you are the only person using a particular computer to access BillQuick HR, select the **Remember** checkbox to make your User ID the default. The Login screen also displays the company name and path to its database.

BillQuick HR allows you to use the **Windows Authentication** option wherein you do not have to specify a login ID or password when connecting to your BillQuick HR database. The access to this database is controlled by your Windows NT account or group, which is authenticated when you log on to the Windows operating system on your system. Hence, you can bypass a separate login for the application.

## BillQuick Login Button Panel



### **Help:**

Opens the BillQuick HR Help in the Login section.

### **Cancel:**

Cancels the changes and closes the screen.

### **OK:**

Accepts the User ID and Password allowing you to log into BillQuick HR.

## Starting BillQuick HR

Once installation is complete, you will see a BillQuick HR icon on your desktop. To start the BillQuick HR application, do one of the following:

- Click the **BillQuick HR** icon on your desktop.
- From the Windows **Start** menu, select **Programs, BillQuick HR**.

## Navigation

### NAVIGATION OVERVIEW

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After logging into BillQuick HR, you can access important sections and functions of the application using any of the several navigation options provided. Click the links below to learn more about the various methods available for helping you navigate the application and completing your task in the least amount of time.

- [Menu Bar](#)
- [Main Toolbar](#)
- [Quick Launch](#)
- **Navigator**
- **Keyboard Shortcuts**

## MENU BAR

The following options are available on BillQuick HR's main menu, located at the top of the application.

File Company Employee Reports Print Forms Windows Help

## File Menu

This menu contains commands that perform file-related tasks, such as creating new databases, backing up and restoring files, purging files, archiving outdated information, and combining slips. This menu contains the following commands:

- **New Company** - Opens the New Company submenu. These commands are used to create new BillQuick HR Company files (i.e. a Standard Database).
- **Open Company** - Opens the Open Company submenu where you can select an existing BillQuick HR database among the various options (i.e. a Standard Database).
- **Open Sample Company** - Opens a submenu where you can select a Sample Database.
- **Login** - Select to login as a different user.
- **Register** - Opens the [Registration](#) dialog where you enter the registration key.
- **Navigator** - Opens the employee Navigator that allows the user to access various employee-related screens such as Journal, Incidents, Assign Benefits etc.
- **Show/Hide Side Menu** - Select to hide or show the [Quick Launch pane](#).
- **Printer Setup** - Select to choose your printer and set up print options.
- **Exit** - Closes all open windows and BillQuick HR applications.

## Company Menu

This menu contains commands that provide information about the company and various related functions.

- **Company** - Opens the [Company](#) information screen which helps you to create a profile of your business.
- **Master Review Form** - Opens the [Review Form](#) that provides information about the employee's review, besides providing details of all the previous reviews.
- **Benefit List** - Select to open the [Benefit List](#) screen to administer the employee benefit plans.
- **Journal Status** - Select to open the [Journal Status](#) Screen and view information about the current status of a journal.
- **Journal Entry Types** - Select to create and maintain a standard list of employee related items, such as degrees, achievements, warnings etc. This list helps you to record the journal details before being posted in the other related forms.
- **Forms** - Opens the [Forms](#) screen. This screen helps in displaying various forms. The forms assist the user in getting information about the employees or any such related data.

- **Preferences** - Select to set or modify global preference settings for BillQuick HR.
- **Security** - Select to enable/disable system-wide security and manager user access to BillQuick functions.
- **Reminder** - Select to view system generated reminders (e.g., pending PTO requests).

### **Employee Menu**

This menu contains commands to create and edit various employees and store all the related information about them.

- **Master Info** - Opens the [Employee](#) screen that maintains a complete record about an employee.
- **Contacts** - Opens the [Contacts](#) screen. The contact screen allows you to maintain a complete list of information about the employee contacts.
- **Payroll** - Opens the [Employee Payroll](#) screen used to generate the employee payroll.
- **Reviews** - Opens the [Employee Review](#) screen where you can view the current status of an employee's review.
- **Incidents** - Displays the [Incidents](#) screen. Used to maintain records of health, safety and welfare for firm employees.
- **Salary History** - Opens the [Salary History](#) screen to view the salary details of an employee.
- **Assign Benefits** - Brings up the [Assign Benefits](#) screen where you can allot benefits to the employees.
- **Benefit Usage** - Opens the [Benefit Usage](#) screen that provides an account of the various benefits/profits enjoyed by the employee.
- **Journal** - Opens the [Journal](#) screen that keeps a track of all employee related items such as degrees, achievements, warnings etc.
- **Termination** - Opens the [Employee Termination](#) screen used to maintain records of employee terminations.
- **Personal Time Off**
  - **Request** - Select to submit a request for Personal Time Off.
  - **Review** - Select to view and approve or reject PTO request.

### **Reports Menu**

BillQuick HR comes with a complete set of reports which can be generated from the company database giving you an insight into the working of your organization. There are more than 30 different types of reports that can be generated.

Click on the various menu options to view and print reports according to the category.

- **Company** - Select to print the Company Information report.
- **Employee** - Opens the list of various Employee Reports. You can view list of employees according to date hired, list of terminated employees etc.
- **Employee Contacts** - Open a list of various reports on [Employee Contacts](#).
- **Employee Benefits** - Opens a list of reports on the [Employee Benefits](#) provided by the company, how they are assigned and their usage.
- **Employee Review** - Opens a list of reports on [Employee Review](#) information such as the criteria used for reviewing and specific employee reviews. You can also generate detailed reports of review done on specific employees.
- **Employee Incidents** - A list of reports about the [Employee Incidents](#) that have occurred in the company. You can print all (Detail) or choose to print incidents according to the status or type.
- **Employee Journal** - Opens a list of reports related to the [Employee Journal](#) features of BillQuick HR. You can print a list of all Journal Entry Types that are used in your company and journal entries for all employees with or without notes.
- **Employee Salary** - Opens a list of reports giving insight into [Employee Salary](#) history.
- **Employee Payroll** - Opens list of reports on [Employee Payroll](#) allowing viewing the payroll information of all employees in one go.
- **Graphs** - Allows you to view various [Graphs](#) that provide a visual representation of Employee Review information.

### **Print Forms Menu**

When the user selects the Print forms menu, the drop-down contains a categorized list of the various pre-defined HR forms. It contains the following type of forms:

- **Recruiting** - Select to display a list of [Recruiting Forms](#). These forms need to be filled regarding an candidate's recruitment into the organization. These forms have specific questions applicants are required to address and submit. The questions are underpinned by specific criteria. These forms are used during the hiring process to ensure the employer hires the right person.
- **Hiring** - Displays [Hiring Forms](#) that assist the employer in hiring classified and well qualified staff. These forms are required to be filled and submitted to the employer. They help to provide the employer all the necessary guidelines regarding employees' eligibility and verification.

- **Payroll Withholding** - Displays a list of [Payroll Withholding Forms](#). These forms offer convenient and cost effective solutions that enable the employees to withhold the required portion of their payroll. These forms are filled in accordance to the information extracted from the employee's federal income tax and other related taxes.
- **Employee Relations** - Select to display a list of [Employee Relations Forms](#). These forms serve as a guide to monitor an employee's obligation towards the company policy and relation with the other employees. These forms not only maintain information related to absence policy, working hours, etc. But, also encourage goodwill for all employees by giving them a clear idea about their company norms.
- **Termination** - Opens the various [Termination Forms](#). All the information about the discontinuation of an employee's service must be stated in these forms clearly mentioning the reasons and conditions of the termination.

### **Windows Menu**

This menu offers versatile window styles to fit any application in accordance to the user's needs reflecting an intelligent design and an unparalleled efficiency. The menu contains commands that help in manipulating several windows at a time. It contains the following commands:

- **Cascade Windows** -When you have multiple windows open, you may want to arrange them such that you can see all or part of each window. Cascading the windows stacks them so that each window title bar is visible.
- **Tile Horizontally** -Use this option while viewing multiple windows at a time. The windows will be tiled horizontally with width equal to the screen width as far as its practical. Thus providing a better and a manageable view.
- **Tile Vertically** - Use this option while viewing multiple windows at a time. The windows will be tiled horizontally with height equal to the screen height as far as its practical. Thus providing a better and a manageable view.
- **Close All Windows** - Use this option when you have a number of windows open at a time and want to close all of them together. This enables the user to close all the current browser windows.
- **Minimize All Windows** - To minimize all open windows use this control. There are occasions when the user has a number of window applications open and may want to reduce all the open windows to the task bar. This command enables to minimize all the open windows easily.

### **Help Menu**

This menu contains commands that provide help using BillQuick HR. It contains the following commands:

- **Contents** - Opens the Help, displaying its Table of Contents.

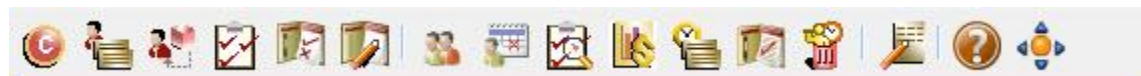











- **About BillQuick HR** - Opens the BillQuick HR [Splash](#) screen, where you can view information about BillQuick HR program.

## MAIN TOOLBAR








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The main toolbar allows you to quickly access various BillQuick HR screens. The following are details about each toolbar button:



Button	Label	Function
	<b>Company Information</b>	Opens the <a href="#">Company</a> screen. The Company screen allows you to create a profile of your business.
	<b>Benefit List</b>	Opens the <a href="#">Benefit List</a> screen. Where you keep track of the facilities, compensation etc. that the company provides for its employees.
	<b>Assign Benefits</b>	Opens the <a href="#">Assign Benefits</a> screen. Where you can assign one or more benefits to a particular employee.
	<b>Company Review Form</b>	Opens the <a href="#">Review Form</a> screen where the user can keep a complete record of the employee's performance.
	<b>Journal Status List</b>	Opens the <a href="#">Journal Status List</a> screen. The journal status screen allows the user to keeps a track of information about any activities that the employer would want to record.
	<b>Journal Type List</b>	Opens the <a href="#">Journal Entry Types</a> screen that enables the user to create and maintain a standard list of employee related items, such as degrees, achievements, warnings etc.
	<b>Employee</b>	Opens the <a href="#">Employee</a> screen. The employee information screen allows you to create and maintain a profile of each employee.
	<b>Employee Payroll</b>	Opens the <a href="#">Employee Payroll</a> screen that contains a financial record of employee's salary, net pay, raises and other associated data.
	<b>Employee Review</b>	Opens the <a href="#">Employee Review</a> screen that contains information related to the annual or

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		biannual employee reviews conducted.
	<b>Salary History</b>	Opens the <a href="#">Salary History</a> screen that allows the user to view the salary, title and other details that change as the employee continues to work with the organization.
	<b>Benefit Usage</b>	Opens the <a href="#">Benefit Usage</a> screen. The benefit usage screen allows the user to accept and process the benefit usage records for every employee. It records information each time the employee uses a benefit.
	<b>Journal</b>	Opens the <a href="#">Journal</a> screen. Supervisors use this screen to monitor the code and conduct of the employees at reasonable intervals; in addition to keep a track of their achievements in their respective fields of expertise.
	<b>Employee Termination</b>	Opens the <a href="#">Employee Termination</a> screen where an employee termination records are maintained.
	<b>Forms</b>	Opens the various <a href="#">Forms</a> . Forms are a range of documents or sample letters that the employee needs to fill in before joining the organization. BillQuick HR provides the user with five main form templates namely Recruiting forms, Hiring forms, Payment withholding forms, Employee relations forms and Termination forms.
	<b>Help</b>	Opens BillQuick HR online <a href="#">Help</a> .
	<b>Navigator</b>	Opens the main Company Navigator. The navigator allows you to perform most of the tasks required in BillQuick HR without having to locate commands in the menus or the toolbar. It is an easy alternative way of locating and accessing various BillQuick HR profiles and screens.

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## QUICK LAUNCH

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Major features and screens can be conveniently accessed from the Quick Launch panel. The bar is divided into three panels, grouping the common functions together under each. These panels include:

### Company:

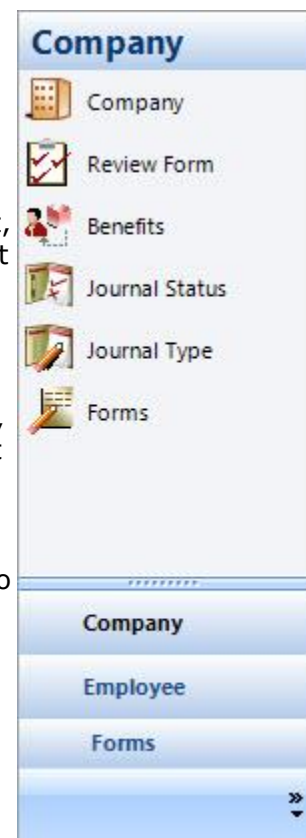
This panel allows you to view all screens that are related to the company in BillQuick HR. From here you can specify the information that you would want to record for the company as a whole. You can open the Company, Benefits, Journal Entry Types, Journal Status List, Review Form and Groups screen from here by clicking on the relevant icon.

### Employee:

This panel allows you to access the screens that allow you to enter information on employee to employee basis. You can open Employee, Contacts, Payroll, Reviews, Incidents, Journal, Salary History, Benefit Usage, Assign Benefits screens, etc. by clicking on the relevant icon.

### Forms:

This panel allows you to access the forms that are available for you to print and fill out. The forms available are in various categories namely, Recruiting, Hiring, Payroll Withholding, Employee Relations, Termination, Compensation, and Employee Benefits forms.



## BillQuick HR Help


### HELP OVERVIEW

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When you buy a software program, you want to know what the application offers, how it benefits you and how to use it in the simplest and fastest way possible. The BillQuick HR Help meets these expectations by covering all the features and functionality of BillQuick HR at the *basic level* (for the first-time users) as well as at the *advanced level* (for existing users). It answers all your important questions - *What is this?*, *What does it do?* and *How do I do it?*

The BillQuick HR Help is organized into books and topics covering everything about a feature or screen in the form of Understanding topics (explanation of concepts), Overview (introduction of screen), Reference Information (description of fields and options on screen), and How Do I (procedure to do a task).

For help on usage of our products or further information, you can access any of the following resources:

- You can access the in-context BillQuick HR Help by clicking the  Help button.
- You can also press F1 in any screen or dialog to access the Help.

- You can access our website [www.bqe.com](http://www.bqe.com) and search through our online [Knowledge Base](#), [e-Letter Archives](#), [FAQs](#) or [Support Documents](#). It also provides information on other products, services and business solutions.
- You can contact our Technical Support to get answers to specific questions at 310-602-4030 or [Support@bqe.com](mailto:Support@bqe.com).

## Help File Conventions

The BillQuick HR Help follows some presentation conventions, making it easier and faster for you to scan and review information. Most of the topics have been organized into three parts:

- Overview: giving a general introduction to the feature or screen.
- Reference Information: providing descriptions of field names and options on screen.
- How Do I: providing step-by-step instructions or procedures for performing a task.

## HOW DO I ACCESS HELP?


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Your BillQuick HR application comes with an in-context or context-sensitive help file. To access the BillQuick HR Help, you can choose any of the following options:

To access the main help:

1. From the Help menu, select Contents.
2. Use the tabs, buttons and links to navigate the help file.

To access the context-sensitive (in-context) help:

1. Click the  Help button on any screen or dialog. Else, press F1.





Providing feedback on BillQuick HR Help. We are always trying to improve the content and usability of the in-product Help. If you find errors or have suggestions about how we can improve the in-product Help, please contact the technical support with your suggestions at [Support@bqe.com](mailto:Support@bqe.com).

## HOW DO I FIND INFORMATION?

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### **Navigation** *Help menu, contents*

The help screen consists of three tabs as described in the table below.

Tab	Function
<b>Contents</b>	Click to view the table of contents for the Help. Click each book  to display pages that link to help topics and click each page  to display the corresponding topic in the right pane.

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**Index** Click to search for specific words or phrases or select from a list of index keywords. Click the keyword to display the corresponding topic in the right pane.

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**Search** Click to locate words or phrases within the content of your topics. Type the word or phrase in the text field, press **Enter** and select the topic you want from the list of topics.

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### Topic Word Search:

When viewing information in one topic, you can easily look up a word by pressing **CTRL+F** keys on your keyboard. This opens up a dialog, where you can specify search for a specific word.

### Expanding Help Topics:

The Contents section of the BillQuick HR Help displays in a tree-like structure. The Table of Contents includes a list of books and pages. Books are indicated by  while pages are indicated by . You can expand and collapse the tree structure by clicking the (+) and (-) signs.

## HOW DO I PRINT HELP?

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You can print help topics and information right from your help screen. Else, you can use and print the [BillQuick Help Manual](#).

### To print a Help topic:

1. Open the Help and select the topic you want to print.
2. From the Help screen, right-click in the right pane and select **Print**. The Print dialog opens.
3. It prompts you to print either the selected topic or all the topics and sub-topics under that book/heading. Click OK.
4. In the Print screen, select the desired printer. You can choose to print the Help on paper or as a PDF.
5. Click Print. The topic is printed to the specified printer (paper or PDF).

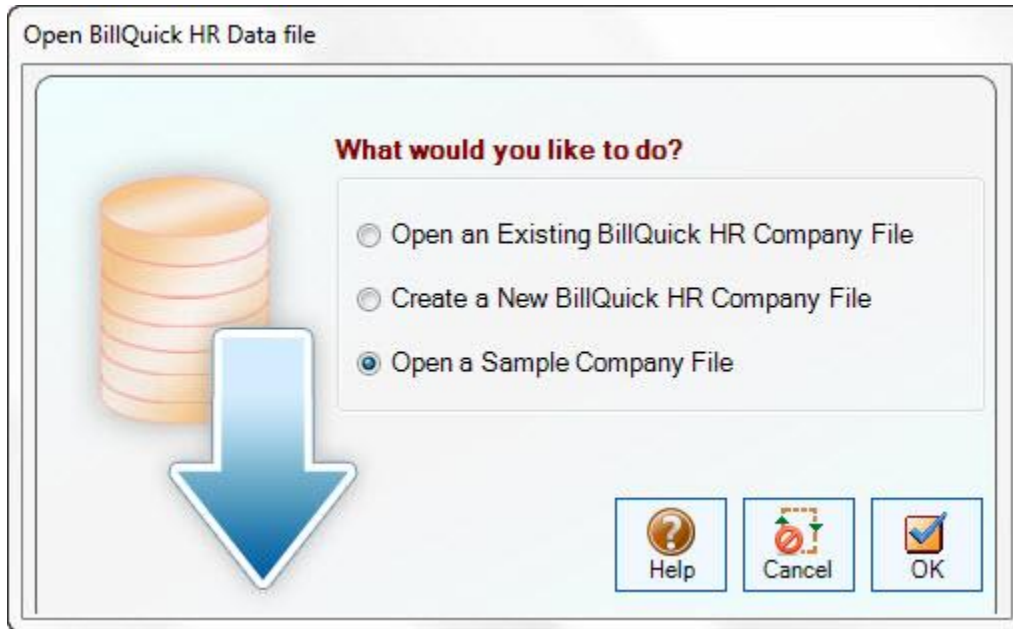
## TUTORIAL

This tutorial is designed to put you in the driver's seat of a powerful HR management tool. It gives you the basics to get started with BillQuick HR. We recommend that, after you are comfortable with the basics presented here, you explore BillQuick HR's many other capabilities. If you have previously used BillQuick HR on this machine, it will automatically open the database that you were in the last time you used the software. If you are running BillQuick HR for the first time, you have to create your Company file in which you store all your important information.

## Data File


This section covers everything you need to know to get started with BillQuick HR. Once installation is complete, you will see a BillQuick HR icon on your desktop. To start the BillQuick HR application, do one of the following:

- Click the BillQuick HR icon on your desktop.
- From the Windows Start menu, select Programs, BillQuick HR.



A screen displays with the three options:

- **Open an Existing BillQuick HR Company File:** This option enables the user to open a previously created database.
- **Create a New BillQuick HR Company File:** This option helps you to create a new Company file. Enter a name for the Company file in the text box provided and click Save. The database is created successfully.
- **Open a Sample Company File:** This opens up a tutorial help page along with the product activation screen. Clicking on the appropriate option opens a sample Company file.

 Once you have successfully created your own Company file, you may be prompted for login. Use the default User ID and Password *supervisor*.

Please note that there is no login screen for the sample Company file hence it does not require any User ID and Password for logging into sample Company file.

## Company Information

This section provides an introduction to various company related modules:

**Enter Company Information:**

1. From the Company menu, select [Company](#)..

**Company Information**

Help | Print | Logo | Save | Close

Name: Hendricks Consulting LLC

Address: 10 Old Plaza, Los Angeles

City: Los Angeles State: CA

Country: USA Zip: 02462-

Phone: (310)-555-1212 Fax: (310)-555-2121

Email: [admin@xyzconsulting](mailto:admin@xyzconsulting)

Web: [www.xyz.com](http://www.xyz.com)

Tax ID: 011234567 Employer ID: 017654321

Other 1: Other 2: Other 3: Other 4: Other 5:

Logo:

FY Begin Date: 01 October 2

FY End Date: 30 September 2

License Key: GJPH-FNQB-Q5TE-W8PX No. of Licenses: 5 [Purchase License](#)

2. Enter your company name, address and other data.
3. Once the information has been entered, click the Save button and then Close.

**Create Review Form:**

Review Form contains a list of criteria by which you can review your employees. To create a review list:

1. From the **Company** menu, select **Master Review Form** or press **Ctrl+2**. The chosen screen displays.
2. Click on the **New** button to add a new review criteria.

Section Name	Description
▶ Work Quality	Provides accurate, thorough and professional work
Job Knowledge	Well-informed and educated in performing to the level expected
New Knowledge	Seeks new knowledge, applies it to the job and shares it with others
Organisation	Organizes, plans and forecasts work skillfully to meet job needs
Analysis	Analyzes problems skillfully, uses logic and good judgement to reach solution
Dependability	Responsible and can be called upon for difficult and pressured challenges
Team Work	Coordinates own work with others, seeks opinions, values working relationships
Attendance	Regularly present and punctual
Safety	Regularly attentive to safety and health regulations

3. Enter the attribute name in the Section Name field. This helps in identifying what type of appraisal is scheduled.
4. Type in any additional information about the review type in the Description field. However, this is optional and the user can proceed without filling in the details in this field.
5. Click the Save button to save the changes.

**Create Benefit List:**

Creating a benefit list allows you to specify what benefits (e.g. vacation, sick time etc.) your company provides for its employees. This is based on the company policies.

To create a benefit list:

1. From the Company menu, select Benefit List. The Benefit List screen is displayed.
2. Click on the New button to create a new benefit.



**Benefit List**

Benefit Name: Personal    Benefit Type: OTHER    Status: Active

Benefit Period Units: Year    Earned Benefit Units: Hour

**Benefit Details:**

Employee earns	16	Hours/Year	after working	1	Years
and earns	32	Hours/Year	until the end of	2	Years
and earns	48	Hours/Year	until the end of	3	Years
and earns	0	Hours/Year	until the end of	0	Years
and earns	0	Hours/Year	until the end of	0	Years
and earns	0	Hours/Year	until the end of	0	Years

**Instructions:**

If an employee earns 5 days of vacation during first year and then 10 days/year for the second and third year, then enter: Employee earns 5 days/year after working 1 year, and earns 10 days/year until the end of 3 years.

3. Enter the period the benefit is measured in. For example, for sick time, the benefit would be measured in days. Select days.
4. Enter the time span in which the benefit would be earned.
5. Select the benefit status and keep it active.
6. Click Save to save the entry.
7. BillQuick HR comes with two default benefits (vacation and sick). On the grid on your left, choose Sick and the data corresponding to it will be displayed on the screen.
8. To change an existing entry, select it from the grid, make the changes in the screen, and click Save on the standard toolbar.
9. In the fields below, enter values to regulate your sick time benefit. For example if an employee earns no sick time in first six months the benefit is assigned to the employee, enter: *Employee earns 0 days after working 6 months.*
10. You may want to specify how over time the amount of benefit earned would differ (e.g. *Employee earns 5 days after working 12 months*). Fill out the details for the rest of the screen.



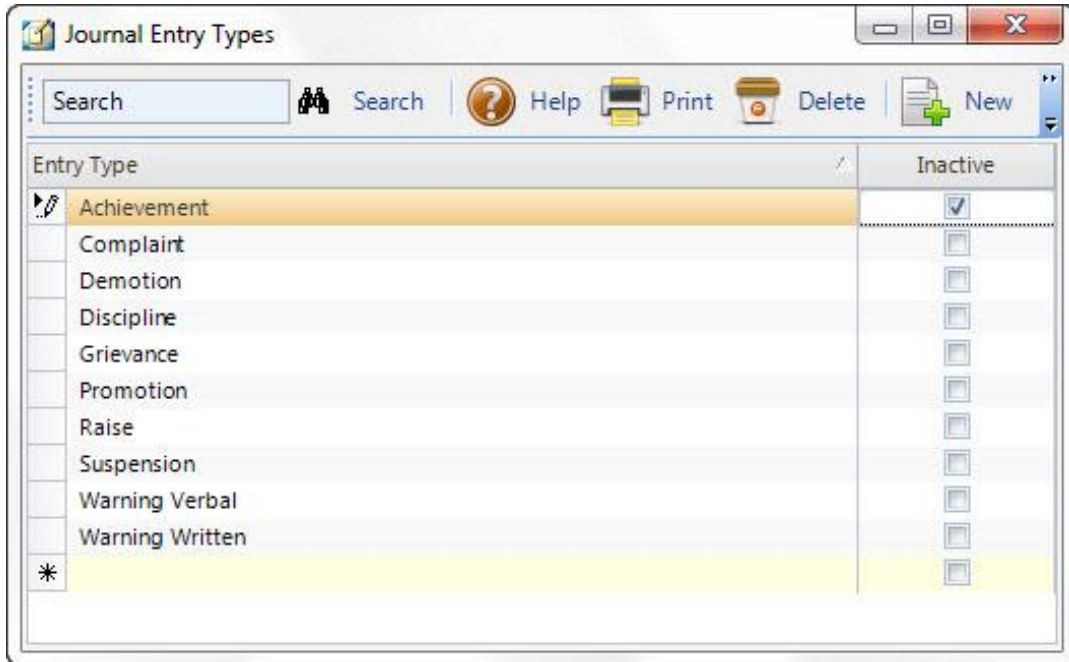
If a benefit status is made inactive, it is no longer available for use in other modules.

You can always create new, delete old and edit the existing benefits by accessing this screen.

### Create Journal Entry Types:

The Journal Entry Types screen allows you to create and maintain a standard list of employee related items, such as degrees, achievements, warnings, etc.

1. From the Company menu, select Journal Type List. The Journal Entry Types screen is displayed.
2. Click on the New button to create a new journal entry.



3. Type in the name of the Journal entry to be made in the Entry Name field to give an idea of the journal type this field refers to.
4. Select the checkbox adjacent to a journal entry to make it inactive.



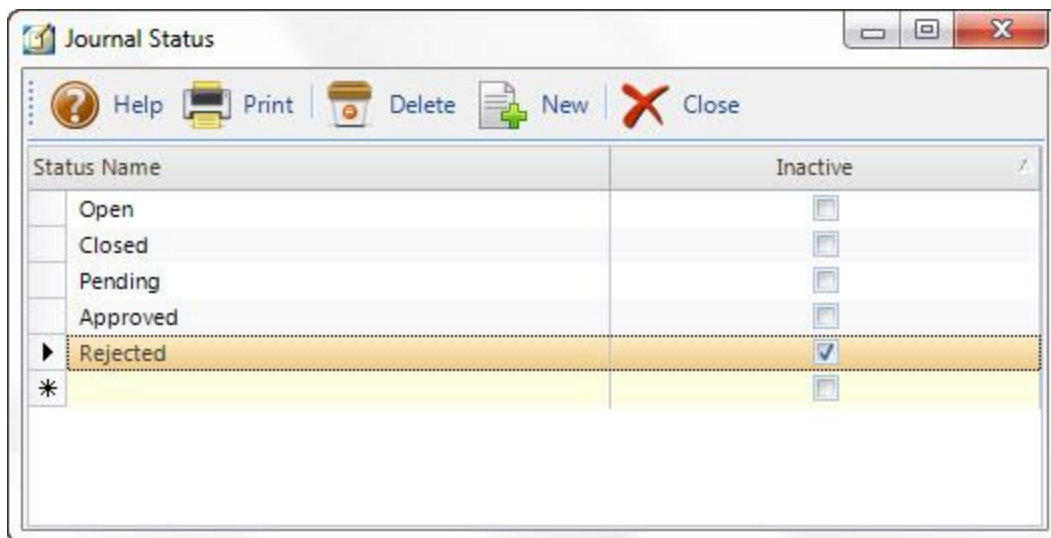
If a Journal entry type is made inactive, it is no longer available for use in other modules.

5. Click on the save button to **Save** the entry.

### Create Journal Status:

The Journal Status allows you to take a note of the status of a journal in terms of whether there is a need to take any action, whether the suggestion was rejected /accepted etc.

1. Choose Journal Status List from the Company menu drop-down list to display the Journal Status screen.
2. Click on the New button to create a new journal status.



3. Mention the status type in the **Status Name** field (e.g. open, closed, pending, etc.).
4. Select the checkbox next to the journal status to make it inactive.



Making the journal status inactive implies that the journal status will not be available in the drop-down list of the other modules.

## Employee Information

Employees are the backbone of your organization. Employee management is one of the key steps in this tutorial and is directed towards the organization's "people" resources. Some of the process steps of employee management are:

### Enter Employee Information:

Entering employee information allows you to create and maintain a profile of each employee. To create employees:

1. From the Employee menu select [Master Info](#) or click the Employee icon from the navigator. If this is your first employee, the cursor will default to the Emp ID field. If not, click **New**.

The screenshot shows the 'Employee' window in BillQuick HR. On the left is a list of employees with columns for ID and Last Name. The main area is the 'General' tab for employee BW, Bert Woolmer. It contains various input fields for personal and professional information, a photo, and a 'Contacts' table at the bottom.

ID	Last Name
BW	Woolmer
CJ	James
JA	Arlington
MK	Kerns
RA	Annbach
RC	Curtis
RT	Thomas
SB	Beth
SE	Annbach
SL	Lawrence
SQ	Quill
WB	Birch
AM	Marcello
BD	Duncan

**Employee Details (Employee ID: BW):**

SSN: 555-45-8888

Name: Mr Bert Woolmer (First Name: Bert, Last Name: Woolmer)

Department: Marketing | Title: Director

Job Desc: | Gender: Male

Company: Hendrick Consulting | Manager: AM

Email: bert@hendricks.com | Status: Active

Birth Date: 05/30/1970

Other: Pay Rate: \$40.00 | OT: \$60.00 | Hired: 03/07/2010

Bill Rate: \$110.00 | OT: \$165.00 | Released:

**Contacts:**

Name	Relation	Phone	Cell Phone
Becky Woolmer	Mother	(310) 555-1212	(310) 555-1414

2. Enter the employee's ID. The field is alphanumeric, allowing both letters and numbers and in mixed case. Move from field to field by using the Tab key.
3. Complete all the relevant fields of information, using the Tab key to move from field to field. BillQuick HR requires this information to effectively track this employee. The minimum you should enter is the first and last name.
4. Once the required fields have been entered, click the Save button and then Close.

**Assign Benefits:**

Once you have created a [Benefit List](#) and a list of employees, you need to assign the benefits to those employees. You do this by:

1. From the Employee menu, select Assign Benefits. The Assign Benefits screen is displayed.
2. In the Employee ID field, select the employee that you wish to assign a benefit to.
3. In the grid below, in the Benefit name drop-down list, choose the benefit that you wish to assign to this employee (e.g. vacation).
4. Enter the Start Date for this benefit. This is the date the employee would start earning the benefit.

Benefit Name	Start Date	End Date
Personal	01/21/2013	01/21/2013
Sick	10/04/2013	10/15/2013
Vac	04/02/2013	05/15/2013

The employee does not start earning the benefit from the day he/she joins the company, but from the start date given here. If you would like the benefit to start the same date as the employee was hired, choose the date he/she was hired as the start date.

5. Enter the End Date for this benefit. This is the date on which the employee would no longer be eligible for earning benefits. You can leave this field blank if you do not wish to have an end date on benefits earning period.

The benefits earning is measured on accrual basis. Hence, if for 1 year an employee earns 6 days leave and the benefit period ends before his 1 year is complete, say 6 months, the employee would earn 3 days of leave.

6. To assign more benefits for this employee, simply go to the next row, and add information on the next benefit.

Press the **Tab** or **Enter** to navigate from field to field on the grid. Moving to the next row will automatically save the data in the previous row.

7. Repeat the above steps to assign benefits for other employees.

### Maintain Employee Payroll:

You need to maintain a financial record of employee's salary, net pay, raises and other associated data. For this purpose BillQuick HR provides a comprehensive and affordable solution for you.

1. From the menu, select Employee, Payroll.
2. Select the employee ID of the employee whose payroll is being set up.

The screenshot shows the 'Employee Payroll' application window. On the left is a list of employees with columns for ID and Last Name. The 'General' tab is selected, showing the following information for employee AM (Marcello):

- Employee ID: AM
- Name: Mr. Allen Marcello
- Title: System Administrator
- Department: IT
- Salary: (empty field)
- Salary Amount: \$400.00
- Pay Period: SemiMonthly
- Last Raise: 03/11/2013
- Standard Hours: (empty field)
- Per Day: 8
- Per Week: 40
- Automatic Overtime:

At the bottom left, there is a link for 'Attachments (1)'. A photo of the employee is shown on the right side of the form.

3. Enter the employee's salary amount.
4. After specifying the employee's salary amount, enter the employee's pay period frequency.
5. Select the date of the employee's raise.
6. Click **Save** when you have completed these steps.

## BILLQUICK HR SUPERVISOR

BillQuick HR Supervisor is an administrator with full security permissions to access and use all features of BillQuick HR.

The Supervisor's role is to setup the company database and manage the access level of each employee with BillQuick HR User status and protect the sensitive information stored in the system. This user can grant and terminate security permissions from any computer on a network that has BillQuick HR installed. Also, this is the only user that can turn the system-wide security on and off.

The default login name and password for the Supervisor user is *supervisor*. To prevent others from logging in as the Supervisor, it is recommended that the default password be changed.



Neither User ID nor Password is case sensitive.

It is also recommended that you grant another BillQuick HR User full access to carry out daily administrative tasks. This user will not be able to disable security or change permissions for other BillQuick HR users. Use the Supervisor user only for managing user permissions and turning the BillQuick HR security on and off.

If the supervisor's password is lost or forgotten, contact our technical Support department by phone at (310) 602-4030 for an authorization key, by fax at (310) 784-8482 or by email at [support@bqe.com](mailto:support@bqe.com). Be sure to include your company name when submitting support email.

## **BILLQUICK HR USER**

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When BillQuick HR [Security](#) is turned on, only the Supervisor and employees with BillQuick HR User status can access the system. Employees who have the *BillQuick HR User* checkbox selected on their [profile](#) can log in to the application when the security is turned on. By default, the login name and password for BillQuick HR Users is their Employee ID. It is highly recommended that the employee passwords be changed after being given user status.

Some of the users may have different security needs than others. The BillQuick HR [Supervisor](#) administers security on a user-by-user basis by creating a security profile to each user. Security profiles are combinations of access rights to the various areas of BillQuick HR. A user can be granted full access, selective access or no access.

- **Full access:** A user with this level of access can view and make changes to records. This person has access to all modules and screens of BillQuick HR. Employees with full access cannot enable or disable security or change permissions for other users.
- **Selective Access:** This is any user who has not been given full access to the system. The Supervisor has granted them permission to access selected modules and screens.
- **No Access:** A user with this level of access can log in to BillQuick HR but cannot access any of its modules or functions.





## USING BILLQUICK HR

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### Company

#### COMPANY INFORMATION

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The Company screen allows you to create a profile of your business. The company profile provides an insight into the various particulars of the company. All information entered in this screen can be used for the reports. The module provides an overview of the company, as well as a brief idea about its location and contact details.

You can modify any information - *except for the company name and license keys*. Changing the company name or a key will make your company database inaccessible.

Company Information

Help Print Logo Save Close

Name: Hendricks Consulting LLC

Address: 10 Old Plaza, Los Angeles

City: Los Angeles State: CA

Country: USA Zip: 02462-

Phone: (310)-555-1212 Fax: (310)-555-2121

Email: [admin@xyzconsulting](mailto:admin@xyzconsulting)

Web: [www.xyz.com](http://www.xyz.com)

Tax ID: 011234567 Employer ID: 017654321

Other 1: Other 2: Other 3: Other 4: Other 5:

Logo

FY Begin Date: 01 October 2

FY End Date: 30 September 2

License Key: GJPH-FNQB-Q5TE-W8PX No. of Licenses: 5 [Purchase License](#)

#### **Name: (required)**

This field is required for maintaining a licensed BillQuick HR database file. Your BillQuick HR [license key](#) is based on your company name.

If you have purchased a BillQuick HR license, you must enter the licensed company name in this field as it appears on the licensing and registration instructions provided upon your purchase of BillQuick HR. The exact spelling, spacing and punctuation are required, although

it is not case sensitive. If the company name is changed after the Company file is licensed, the result will be an unlicensed BillQuick HR database file. Please consult BillQuick HR technical support, [support@bqe.com](mailto:support@bqe.com), if you must change the company name.

**Address:**

The company street or mailing address.

**City:**

The company city, this field will appear on all reports.

**State:**

The name of the state where the company is located.

**Country:**

The name of the country where the company is established.

**Zip:**

The zip or postal code of the area where the company is located. This field will appear on all reports.

**Phone:**

The company's phone number. This field will appear on all reports.

**Fax:**

The company's fax number. This field will appear on all reports.

**E-mail:**

The company e-mail address. Double-click the address in this field to open your default e-mail program.

**Web:**

The company's web address. Double-click it to open your default Internet browser.

**Tax ID:**

The company tax identification number.

**Employer ID:**

The company employer identification number.

**Other1/2/3/4/5:**

These text boxes allow you to record additional information about the company.

**Logo:**

You are able to select the desired image/logo, which will be displayed at the top in all the reports generated by the company. The logo must be a bitmap (BMP) or JPEG compressed image (JPG) formatted file, no larger than 125 x 125 pixels. Click **Logo** on the Button panel to add or remove a logo graphic.

**FY Begin Date:**

The Starting date of the company's financial year.

**FY End Date:**

The End date of the company's financial year.

**License Key : (required)**

Encrypted sequence that uniquely identifies your company and authorized user count. Your BillQuick HR license key is based on your company name. If you have purchased a BillQuick HR license, enter the license key in this field.



License keys are stored in the Company file. You will be required to enter them only once from any computer where BillQuick HR is installed. If the company name is changed after the database file is licensed, the result will be an unlicensed BillQuick HR database file. Please consult BillQuick HR [Technical Support](#), if you must change the company name or to obtain your license key.



After adding the license key for BillQuick HR, you must complete Registration, the second step of the process.

**No. of Licenses:**

Displays the number of licenses purchased. You must ensure that the number of persons using the BillQuick HR software installed on a network server does not exceed the number of licenses that you have. If the number of users of the software installed on a network server exceeds the number of licenses, you must purchase additional licenses until the number of licenses equals the number of users before allowing additional users to use the BillQuick HR Software.

**Purchase License:**

Click this link to purchase your license for using BillQuick HR. For more details please visit our website or call us.

**COMPANY BUTTON PANEL**

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**Logo**

**Add Logo:** Allows you to add a company logo by selecting the desired image from any file/folder. It accepts only bitmap images with length and height less than or equal to 125 pixels.

**Remove Logo:** Allows you to delete the current company logo selected previously.

**Help:**

Opens the BillQuick HR Help.

**Print:**

Click to preview and print the Company Information report.

**Save:**

Saves information as entered on the Company screen.

**Close:**

Closes the Company screen.

## REVIEW FORM

### **Navigation** Company, Master Review Form

When it comes to measuring employee performance, each company has its set of criteria to be used to measure the contribution the employee is making to the organization. This in turn affects how the company compensates the employee.

BillQuick HR provides you with an easy to use, powerful and yet flexible tool to help you measure your employee performance. The Review Form allows you to create a set of criteria to measure employee performance. For example, you might want to measure an employee's product knowledge, programming skills, management skills, etc. You would then create a review list of all these criteria used to measure your employee's performance.

You use the Review Form screen to create and maintain a standard list of criteria to measure performance of your employees. Although an unlimited number of attributes can be listed, we recommend that you keep the list as short as possible to ease the task of the manager.

#### **Section Name:**

Type the attribute name in this field.

Section Name	Description
▶ Work Quality	Provides accurate, thorough and professional work
Job Knowledge	Well-informed and educated in performing to the level expected
New Knowledge	Seeks new knowledge, applies it to the job and shares it with others
Organisation	Organizes, plans and forecasts work skillfully to meet job needs
Analysis	Analyzes problems skillfully, uses logic and good judgement to reach solution
Dependability	Responsible and can be called upon for difficult and pressured challenges
Team Work	Coordinates own work with others, seeks opinions, values working relationships
Attendance	Regularly present and punctual
Safety	Regularly attentive to safety and health regulations

#### **Description:**

Enter descriptive detail for the selected section.

**Section Grid:**

The list of all review items are displayed on this table. The grid displays the Section Name listing the name of the attribute under consideration and provides Description listing the summary of the reviews. Clicking on any item in the grid will enable you to view/edit the information on that particular review item.

**REVIEW FORM BUTTON PANEL**

---

The following information details the options available on the Review Form button panel



The button panel can be located at the top or bottom of the screen using the drag and drop feature. This location is memorized in the screen.

**Search:**

Type in a keyword which you wish to be searched for you.

**Help:**

Opens the BillQuick HR Help in the Master Review Form section.

**Print:**

Click to preview and print the Review Section List report.

**Save:**

Saves any data that has been entered.

**Cancel:**

Cancels any data that is being entered to the Review Form.

**Delete:**

Click to delete a selected row or an attribute. More than one row can be deleted at a time by holding the <SHIFT> or <CTRL> key when selecting rows.

**New:**

Click to enter review information to BillQuick HR. The new entry will automatically get added to the items in the grid.

**Close:**

Click to close the Review Form screen.

**BENEFIT LIST**

---

A very useful feature of BillQuick HR is the Benefit List. This feature allows you to keep track of the benefits the company provides for its employees such as facilities, compensation, etc. Get an overview of how benefits work by clicking [here](#).

The Benefit List provides a list of employee benefit services including benefit compensation plans provided by the company. Employee Benefits are usually non-monetary compensations provided to an employee. The benefits provided may include employee health, sick time, vacation, personal time, retirement, time off benefits and employee benefits management services.

A pivotal component of BillQuick HR, this feature allows you to:

- Keep track of benefits that a company offers to its employees.
- Allows [administering](#) a different set of benefits for each employee.
- Tracks beneficiaries and related information unique to each benefit.
- Calculates benefit coverage that is based on variables (e.g. number of days worked).

Your company might have specific policies on which employees would be eligible for a particular benefit. For example, you might have a policy that for the first 6 months the employee works, he is entitled to no vacation; however, after working for a year the employee could be entitled to 7 days of vacation time.

BillQuick HR has an ability to cater to your specific needs in terms of policies when regulating employee benefits. For each benefit, you can specify how to measure the benefit earned and how long an employee would take to earn that particular benefit. The flexibility provided in this screen allows you to customize the benefit management process according to your company's specific policies.

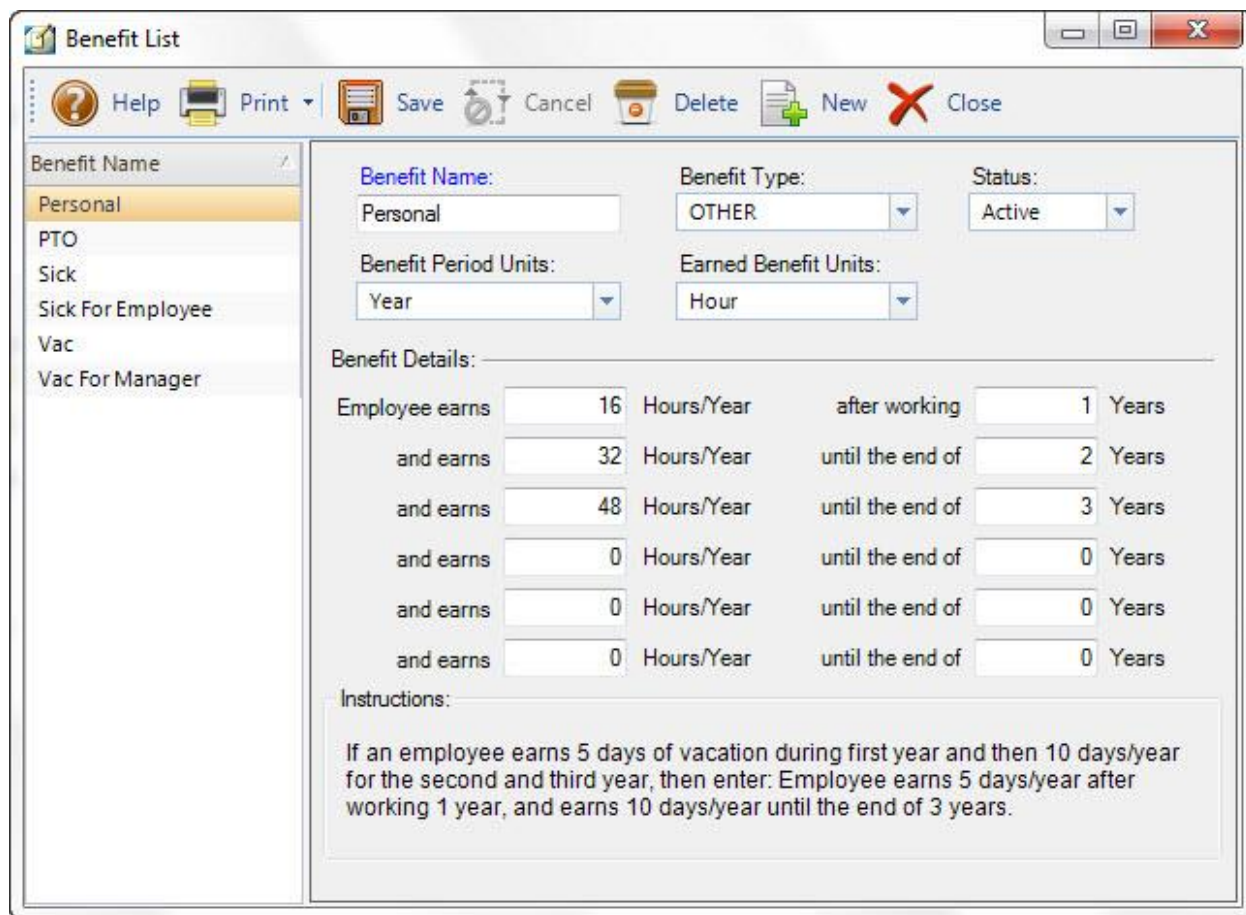
From this benefit list, you can choose to apply a certain group of benefits to a specific employee in the [Assign Benefits](#) screen.



Find out how to create benefits [here](#).

**Benefit Name: (required)**

From the Benefit List Grid, select the Benefit name for which you wish to specify the settings. This name is displayed in the Benefit Name field. The field size should not exceed 50 characters.



**Benefit Name:** Personal      **Benefit Type:** OTHER      **Status:** Active

**Benefit Period Units:** Year      **Earned Benefit Units:** Hour

**Benefit Details:**

Employee earns	Hours/Year	after working	Years
16	32	1	Years
and earns	32	until the end of	2 Years
and earns	48	until the end of	3 Years
and earns	0	until the end of	0 Years
and earns	0	until the end of	0 Years
and earns	0	until the end of	0 Years

**Instructions:**

If an employee earns 5 days of vacation during first year and then 10 days/year for the second and third year, then enter: Employee earns 5 days/year after working 1 year, and earns 10 days/year until the end of 3 years.

**Benefit Type:**

The concept of benefit type enables the user to define a particular type for a benefit (e.g. sick for manager can be a benefit type of sick benefit). There are three benefit types: Sick, Vacation and Other. The benefit type helps to distinguish between different types of benefits and allows defining a number of sub-categories under the same benefit. This feature broadly helps to meet the varied company needs. A company can have separate benefit rules for a group of employees. The usage of benefit type helps overcome the limitation of using the same benefit for each employee.

**Status:**

Specify whether the benefit is active or inactive from this drop-down list. For example, sick time may be active (i.e. it is provided for by the company) and personal time may be inactive.

**Benefit Period Units:**

The time frame that the employee must work in the company to earn a particular benefit. Select the duration of the benefit period in terms of the units given in the drop-down list (e.g. hours, days, weeks, months, years).

**Earned Benefit Units:**

The time span of a benefit (e.g. sick time) that an employee earns after he/she has completed the specified term. Select the duration of the benefit period earned in terms of the units given in the drop-down list (e.g. hours, days, weeks, months, years).

## **BENEFIT DETAILS:**

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A series of fields in the form of statements to allow you to specify the policy of your company. You might have a policy whereby an employee earns 5 days sick time in the 1<sup>st</sup> year, 7 days in the 2<sup>nd</sup> year and so on. This can be specified with six conditions by entering the following fields:

### **Employee earns**

Specify the duration of time earned by the employee after working for a specified period.

### **After working**

Specify the duration of time for which the employee works to earn his benefit.

## **BENEFIT LIST BUTTON PANEL**

---

The following information details the options on the Benefit List button panel.



The button panel can be located at the top or bottom of the screen using the drag and drop feature. This location is memorized in the screen.

### **Help:**

Opens BillQuick HR Help in the Benefit List section.

### **Print:**

Opens a drop-down with in-context reports namely:

- [Company Benefits List](#)
- [Company Benefits List \(Detail\)](#)

You can print, preview or cancel the report.

### **Save:**

Saves information as entered on the Benefit List screen.

### **Cancel:**

Cancels any data that has been entered in the Benefit List Screen.

### **Delete:**

Click to delete the selected entry in the list.

### **New:**

Click to make a new entry in the Benefit List screen.

### **Close:**

Click to close the Benefit List screen. Be sure to click on Save before closing to save your changes.



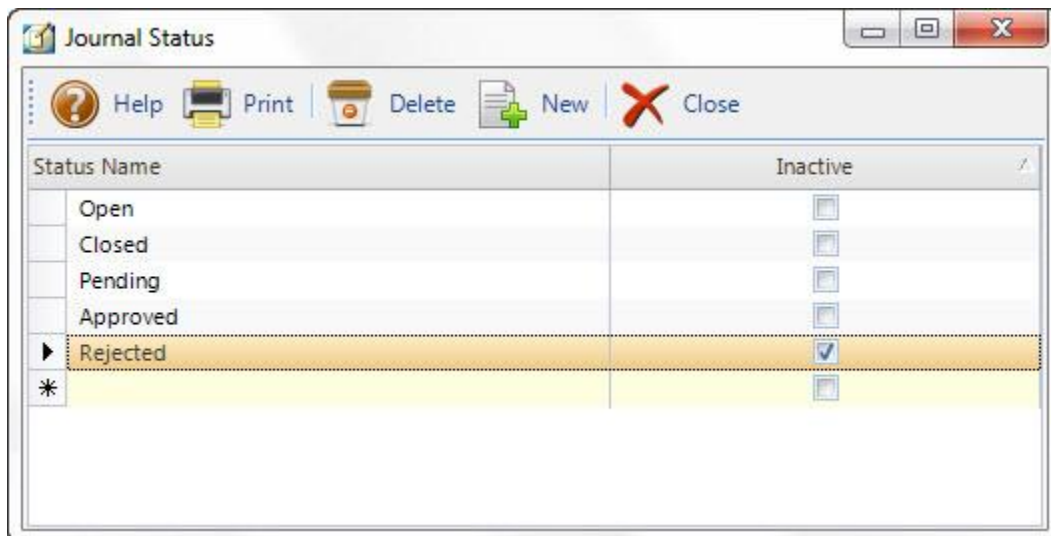
## JOURNAL STATU

The Journal feature of BillQuick HR is like an employee diary in which management can record information about any employee related activities.

Journal Status helps you to take note of the status of the journal in terms of whether there is a need to take any action, whether a suggestion was rejected /accepted, whether the action has already been taken on the journal and that no more discussion is required. The journal status list that you would want to create would depend on the specific needs of your company.

### Status Name

Type the name of the status. You should keep it short and meaningful so that it is easy to understand when making journal entries. For example, you can create journal status by the names like:



- **Open** - to indicate that the journal has not been reviewed yet. The journal is open to additions and deletions.
- **Closed** - to indicate that the journal has been closed and no new entries may be recorded in this journal.
- **Pending** - to indicate that the journal awaits conclusion or confirmation. Recorded entries may be edited, but no new entries may be recorded.
- **Rejected** - to indicate that the journal entry has been denied.
- **Approved** - to indicate that the journal has been given an authoritative approval and hence forth is acceptable.



There is no limitation on the number of status that you can create, but we suggest the list stay short so that it is easier for you to manage.

## Inactive

Select this option if you have created a journal status and do not want to use it (as it won't be displayed in the [Journal](#) screen). By keeping a status inactive, you ensure that any new journal entries that are created won't have this status.

## Journal Status Button Panel

The following information details the options on the Journal Status button panel:



The button panel can be located at the top of the screen using the drag and drop feature. This location is memorized in the screen.

### Help:

Opens the BillQuick HR Help.

### Print:

Opens a drop-down list with in-context reports with [Journal Status List](#). You can print, preview or cancel the report.

### Cancel:

Cancels any data that is being entered to the Journal Status screen.

### Delete:

Click this button to delete an entry. More than one row can be deleted at a time by holding the <SHIFT> or <CTRL> key when selecting rows.

### New:

Click to enter a new journal status.

### Close:

Closes the screen.

## JOURNAL ENTRY TYPES

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### *Navigation* Company, Journal Type List

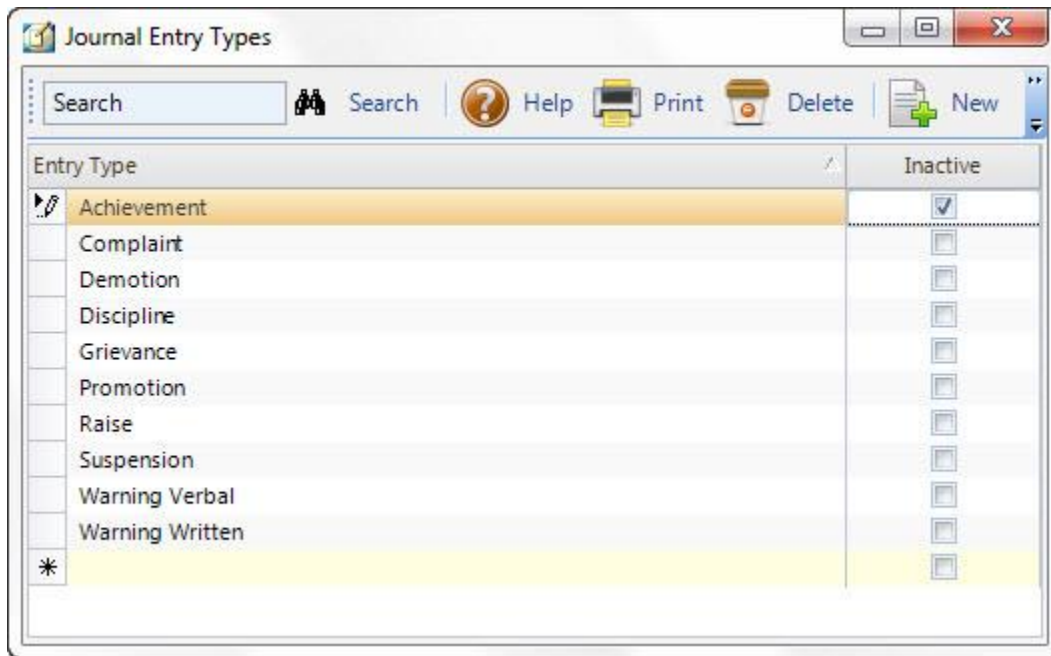
To provide BillQuick HR users with the flexibility to record just about anything depending on the specific needs of the company, the journal feature is very valuable.

The Journal Entry Types screen allows you to create and maintain a standard list of employee related items such as degrees, achievements and warnings for each employee. Journal entries are intended to assist the supervisors to monitor the code and conduct of the employees at reasonable intervals, in addition to keeping track of their achievements in their respective fields of expertise. Although an unlimited number of journal entries can be created, we recommend that you keep the list as short as possible to ease the task.

To record journal for each employee, you would have to access the [Journal](#) screen (Employee menu, Journal), where the journal types created are displayed on a drop-down list. You can record any specific type of journal for your employees.

**Entry Type:**

Type the name of the Journal entry to be made. The name should be short and descriptive (e.g. Promotion, Warning, etc.).

**Inactive:**

Select this check-box for Journal Entry types that you don't want to appear in the Journal Type drop-down in the [Employee Journals](#) screen. Inactive Journal Entry types are not listed in the Journal type drop-down list in the Journal's screen.

**Journal Entry Types Button Panel**

The following information details the options on this Journal Entry Types button panel.



The button panel can be placed on top or bottom of the screen using the drag and drop feature. This location is memorized in the screen.

**Search:**

Type in a keyword to search for a specific entry type.

**Help:**

Opens BillQuick HR Help in the Journal Entry Types section.

**Print:**

Opens a drop-down with in-context reports with the [Journal Entry Types List](#). You can print, preview or cancel the report.

**Save:**

Saves information entered on the Journal Entry Types screen.

**Delete:**

Click to delete a selected entry. More than one row can be deleted at a time by holding the <SHIFT> or <CTRL> key when selecting rows.

**New:**

Click to make a new journal entry type into BillQuick HR.

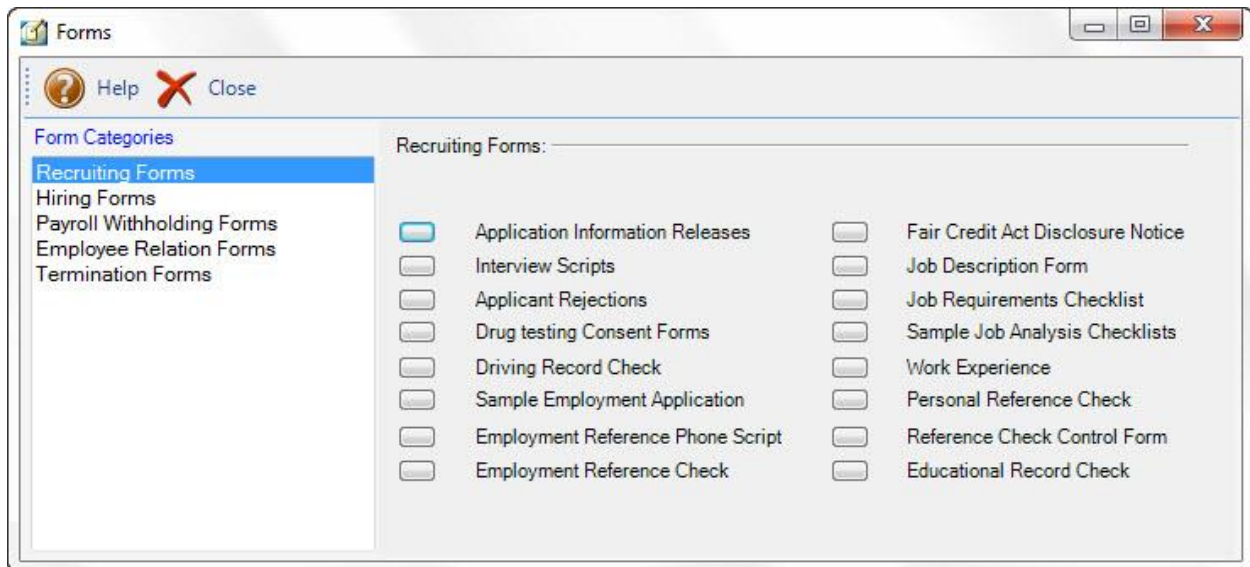
**FORMS**

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A form is a document, usually with blank spaces for answers or information to be supplied. In the human resource management process, they play an important role in getting information about the employees.

BillQuick HR provides you the facility to print various types of forms on the click of a button from the Print Forms option. A large variety of forms are available for you to choose from and use according to your business needs. You can use forms to get information from the employee or even prepare yourself with a ready to print interview script.

The forms are grouped into categories and are displayed on the left side of your screen. Clicking on any form category displays links to the various forms in that category.



The Forms module in BillQuick HR is highly customizable allowing you to decide the names and the files associated with each of the form links on the screen. Clicking the **Select New File**  button next to the form name opens a screen allowing you to change the name of the form (displayed on the screen), and the path. You can browse and choose any file which you want to be displayed when the form is needed.

The following are the forms that are included in BillQuick HR:

- **Recruiting Forms**  
When an individual is enrolled as a worker or member in an organization, that person must fill out certain recruitment forms. These forms may include information about

the employee's driving record, work experience, reference check, educational record, job requirements, job description etc. These forms recruitment forms include:

- Applicant Information Release
- Interview Script
- Applicant Rejection
- Drug Testing Consent
- Driving Record Check
- Educational Record Check
- Sample Employment Application
- Employment Reference Phone Script
- Employment Reference Check
- Fair Credit Act Disclosure Notice
- Job Description
- Job Requirements Checklist
- Sample Job Analysis Checklist
- Work Experience
- Personal Reference Check
- Reference Check Control
- **Hiring Forms**  
When an individual is employed in the organization and paid for services provided, this person must fill out certain forms in order to keep a record. These forms include:
  - INS Form I-9
  - Independent Contractor Agreement
  - COBRA Notification
  - Sample Non-Complete Agreements
- **Payroll Withholding Forms**  
According to the United States income tax laws, employers are required to withhold a portion of each employee's income and pay it directly to the U.S. Internal Revenue Service. This "withholding" acts as a prepayment of tax they will owe at the end of the year, as well as a direct payment of certain other taxes. The amount of a person's federal income tax withholding depends on several factors such as the taxpayer's marital status, the number of children or dependents the taxpayer has etc. A taxpayer will get a tax refund if his or her withholding for the year was greater than the income tax he actually owed. For this purpose the employee is made to fill certain forms which include:
  - Federal Form W-4
  - State Payroll Withholding Forms
- **Employee Relation Forms**  
When an individual is employed in the organization, he is supposed to follow certain rules and policies based on his relations with other employees and the employer. These norms are recorded in the Employee Relation Forms which the employee must fill out. These forms usually include information such as the absence policy, working hours, discipline documentation, etc. The following Employee Relations forms are included with BillQuick HR:
  - Sample Absence Policy
  - Ten Steps for Giving Feedback
  - Time Spent During Working Hours
  - Sample Disability Policies
  - Discipline Documentation Form
  - Drug Test Policy
  - Sample Feedback Script
  - Sample of General Work Rules
  - Violence in the Workplace Prevention Policy

- Checklist for Handling Workers Compensation Claims
- Sample Sexual Harassment Policy
- Telecommuting Site Checklist
- All Employees/Daily Time Record
- Overtime help: Regular rate checklists and Policy Guidance
- Holiday/Vacation Policy
- Sample Progressive Discipline Policy
- **Termination Forms**

On the discontinuation of an employee's employment or service, certain forms are to be filled completed. These record information regarding an employee's termination (e.g. reasons that led to his termination, conditions of termination, etc.). These forms include:

  - General Release for Employment Termination
  - Termination Meeting Checklist
  - Employment Reference Release

### Forms Button Panel

The following information details the options available on the Forms button panel:



The button panel can be placed at the top of the screen using the drag and drop feature. This location is memorized in the screen.

#### **Help:**

Opens the BillQuick HR Help in the Forms section.

#### **Close:**

The Close button will close the Forms screen.

### Preferences

#### **PREFERENCES - OVERVIEW**

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#### **Navigation** *Company menu, Preferences*

Use the Preferences screen to customize the look and feel of BillQuick HR screens. Through Preferences, you can customize BillQuick HR to suit the unique needs of your business and your personal style of working. You can use these preferences to customize the appearance of [grids](#) and [drop-down list](#) throughout the program. Various [options](#) such as HR's color scheme, start-up method and database passwords can be set or customized. You can also set-up [Preferences-Mail](#) to enable HR to send emails.

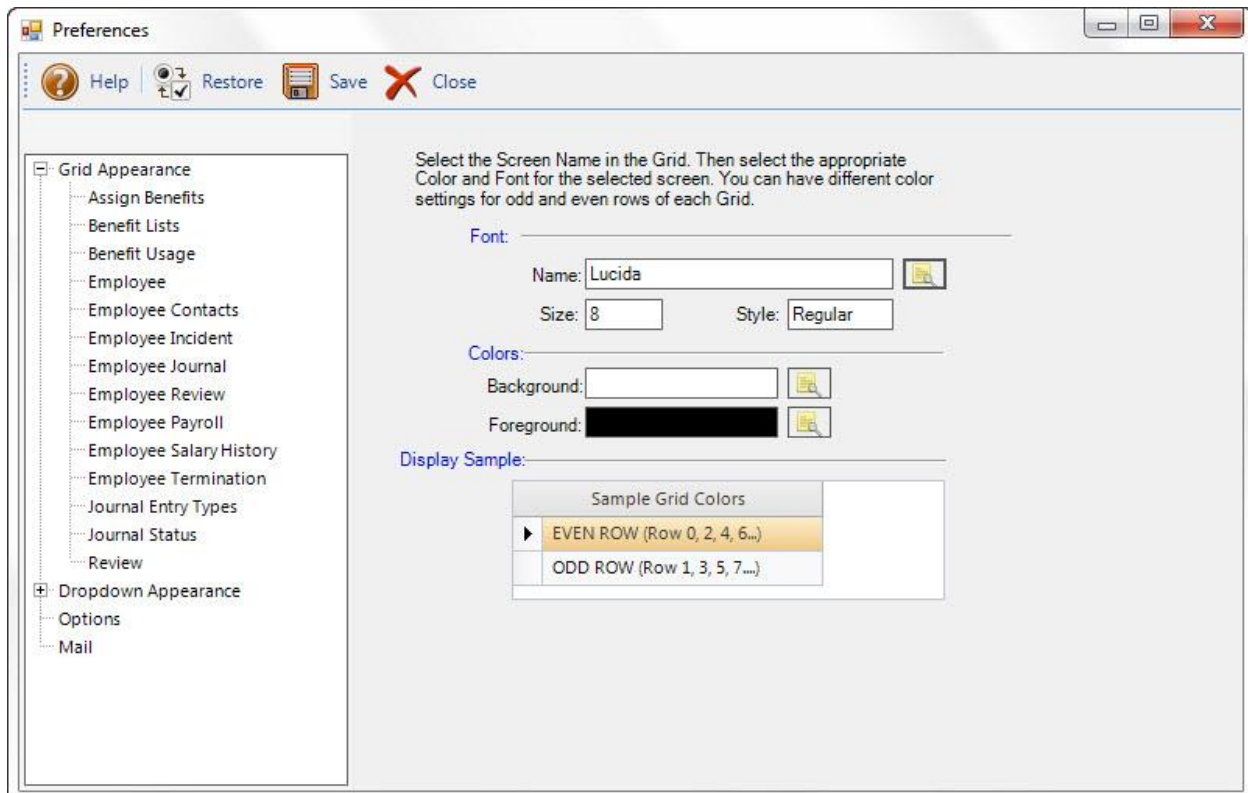


Preferences are user/computer specific.

## PREFERENCES - GRID APPEARANCE PANEL

The fonts and colors used in grids in various modules can be customized in Preferences. Select the module(s) for which you wish to change the display appearance and then specify the display settings for the grids.

The Grid Appearance list on the left displays the screen names in BillQuick HR. For each of these screens you can choose to display the associated grid settings.



### Font

#### Name:

Click  adjacent to this field to select a font and specify its size and style.

#### Size:


Displays the size of the selected font.

#### Style:

Displays the font style (e.g., regular, italic, etc.).

### Colors

#### Background / Foreground:

Click  adjacent to the Background and Foreground fields to specify the colors to be used.

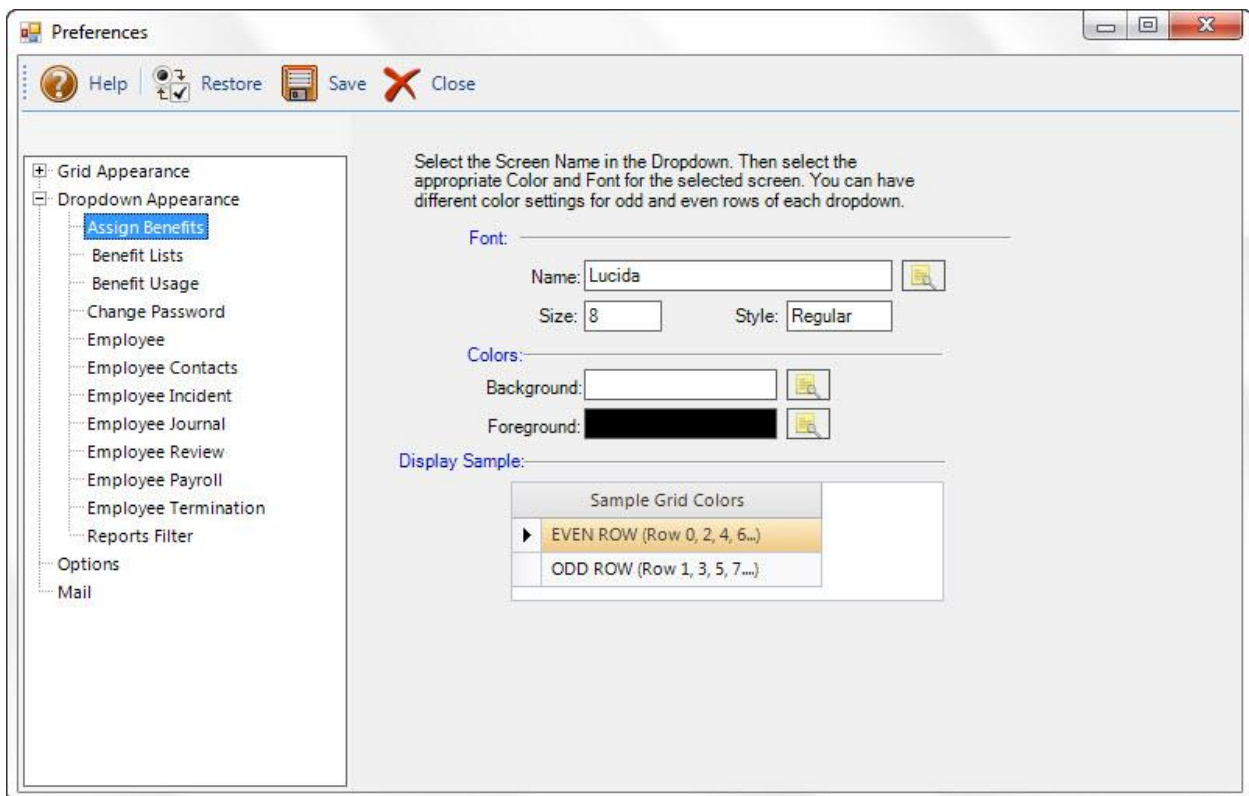
## Display Sample

### Sample Grid Colors:

This shows a sample grid with your selected display settings. Select the Even or Odd Row line *before* customizing its font and colors. The first row in a grid is counted as row #0 and is therefore considered even.

## PREFERENCES - DROPDOWN APPEARANCE PANEL

As you can customize grids, you can also customize the appearance of drop-down lists on various screens throughout BillQuick HR. In the Drop-down Appearance panel in [Preferences](#), select the screen(s) for which you wish to change the display appearance and then specify the display settings for the drop-down lists.



### Font

#### Name:

Click adjacent to this field to select a font and specify its size and style.

#### Size:

Displays the size of the selected font.


#### Style:

Displays the font style (e.g., regular, italic, etc.).



## Colors

### Background /Foreground:

Click  adjacent to the Background and Foreground fields to specify the colors to be used.

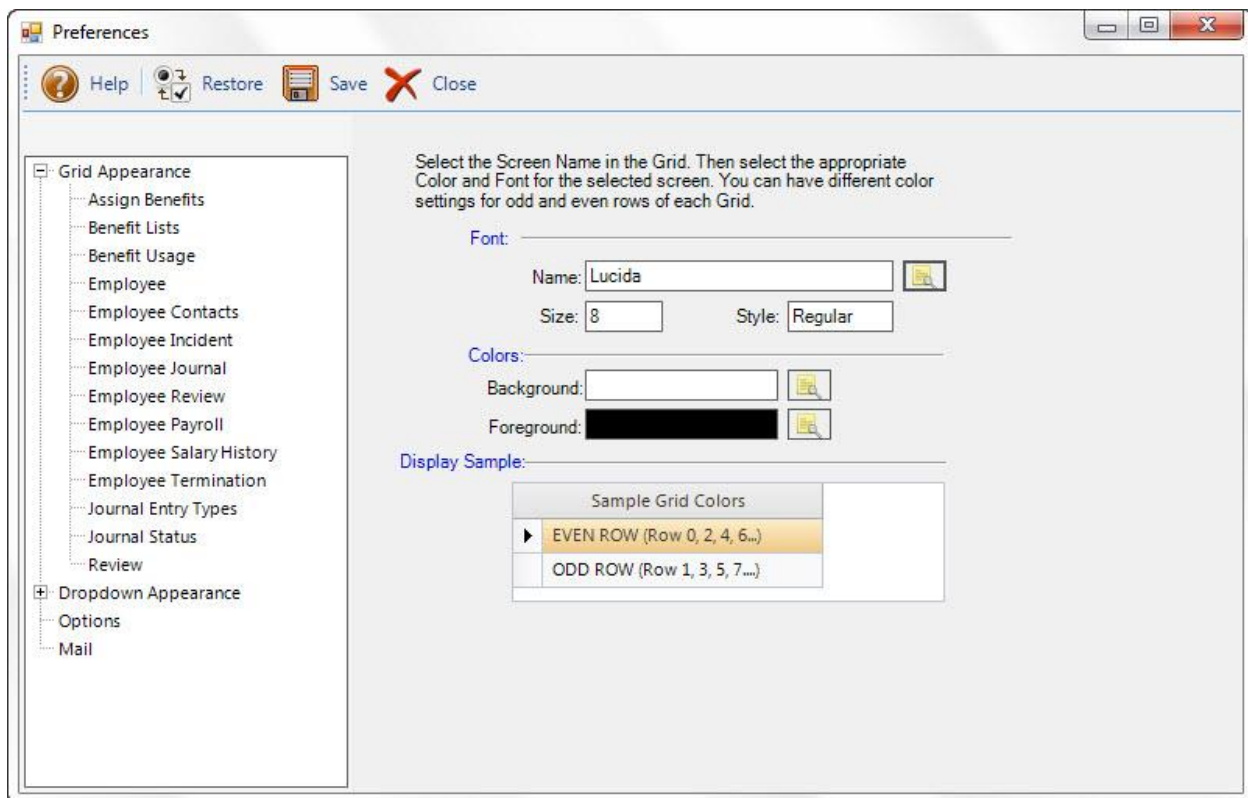
### Display Sample

#### Sample Drop Down Colors:

This shows the sample of a drop-down lists with your selected display settings. Select the Even or Odd Row line *before* customizing its font and colors. The first row in a grid is counted as row #0 and is therefore considered even.

## PREFERENCES - OPTIONS PANE

Use the preferences on this screen to configure settings that affect how the software functions. You can set settings that control the appearance of the HR interface (e.g., color theme and status bar). Other options that can be set here include the database password, SSN and Zip code field labels and masks, and the shared folder location of the your attached files.



## Startup/Exit

### Skip warning upon Exit:

Check this option if you do not wish to be warned when exiting BillQuick HR.

**Show Help on Startup:**

Check this option if you wish to display BillQuick HR help every time you start BillQuick HR.

**Turn Of**

**Navigator:**

You are allowed to check the option to turn off the BillQuick HR navigator. Checked, the navigator screen *does not* display when you start BillQuick HR.

**Option**

**Hide Sidebar Explorer Bar:**

Allows you to hide or show the BillQuick HR explorer bar on the left side of the screen. Select this option to hide the bar by default.

**Make all the screens Non-MDI:**

Select this option to have the ability to drag your screen outside the main BillQuick HR screen.

**Make all screen Tabbed MDI:**

Select this option to view all the open screens in BillQuick HR as tabs in the main screen.

**Select Theme:**

Make a selection from this drop-down list to select a color theme to BillQuick HR.

**Custo**

**SSN Label:**

Name or label applied to the selected field. SSN Label can be customized to your particular information needs and the customized label will replace SSN label in all the screens. The caption allows alphanumeric characters. Field labels vary in length, most being 5 or 9 characters long. The field size should not exceed 30 characters. Be descriptive, but also concise, when replacing a standard field label.

**SSN Mask:**

Sequence of letters, numbers and punctuation used for entering formatted data. Select a predefined mask from this drop-down list.

**Zip Label:**


Name or label applied to the selected field. The zip Label can be customized to your particular information needs and the customized label will replace Zip label in all the screens. The caption allows alphanumeric characters. Field labels vary in length, most being 5 or 9 characters long. Be descriptive, but also concise, when replacing a standard field label.

**Zip Mask:**

Use to set the sequence of letters, numbers and punctuation used for entering formatted data. The field size should not exceed 95 characters. Select a predefined mask from this drop-down list.

## Attachments

### Location of shared Folders for Attachments:

You can specify the location of a shared folder where the attachments will be stored automatically whenever they are attached with the BillQuick HR data. Click on the browse icon  to select an existing folder or to create a new folder for storing the attached files.

### Database Password

You are allowed to change the database password and assign a new password. By default, the database password is **admin**.

#### Current Password:

Enter the current database password.

#### New Password:

Enter the new password.

#### New Password (Verify):

Re-enter the password for confirmation.

#### Change:

Click to apply and save the new database password.

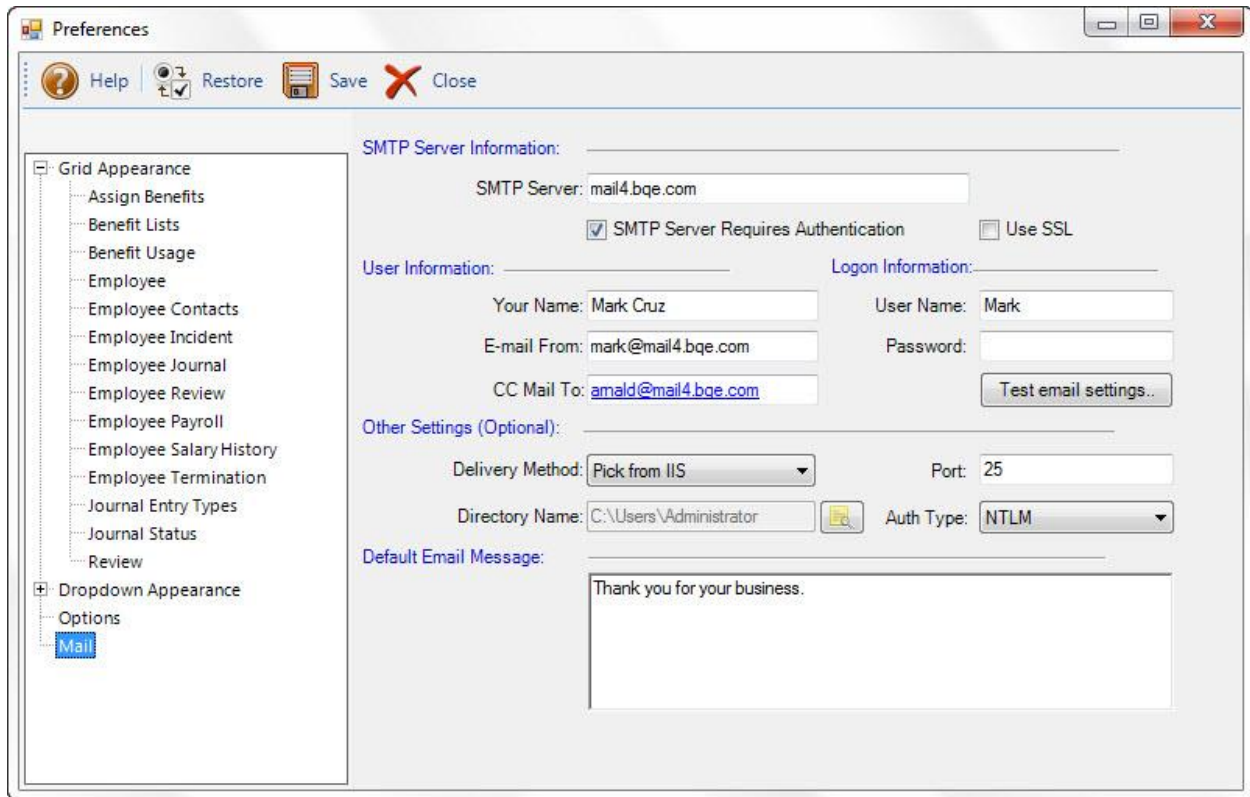
## PREFERENCES - MAIL PANEL

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Use the options on the Mail screen to configure BillQuick HR to send emails and PDFs using any email program (e.g., Outlook, Yahoo, AOL, MSN, Google, etc.). The settings specify here are called every time you run generate an email from BillQuick HR.



If you are not sure of what settings to use, contact your ISP.



## Server Information

### SMTP Server:

Here you specify the SMTP mail server name for sending emails. SMTP is a relatively simple, text-based protocol, which can be used to send a message to one or more recipients specified, along with the message text. For example, for Gmail we use **smtp.gmail.com**.



SMTP (Simple Mail Transfer Protocol) is an Internet standard for sending emails across Internet Protocol (IP) networks. **SMTP** is completely independent of the email client that you use (you can still send using your email client). You need to setup the mail settings on, once on the server, and no matter how many changes there are to the workstation email clients, your application keeps working.

### SMTP Server Requires Authentication:

When this option is selected, the SMTP Server will use the information as provided in the text boxes below, else it will use the default credentials as specified in your default SMTP properties.

### Use SSL:

Select this option to protect the confidentiality and security of data being transmitted between your email program and the servers. SSL stands for *Secure Sockets Layer*.

## User Information

### Your Name:

Enter the name to display as the sender of emails generated with BillQuick HR.

### E-mail From:

Enter the email Address to be used for sending mails.

### CC Mail To:

The email address of the person to receive a copy of your emails. The email address you specify here will be automatically filled in the **CC** field of the email message while emailing invoices, statements or reports.

## Logon Information

### User Name:

Specify the User Account Name for the SMTP mail server being used. For example, if you are using Gmail services, enter your Gmail username here.

### Password:

Specify the password for the SMTP mail server.



If the authentication mode is not anonymous, the user (i.e., name and password) is authenticated before sending the mail.

## Other Settings (Optional)

### Delivery Method:

Three options are made available to the user: **Network, Specified Pickup Directory, Pickup from IIS**. In Pickup from IIS, the email file is dropped in the default location where IIS looks for emails. In Network, the email file is sent directly through the network. In Specified Pickup Directory, the email file is delivered to the specified directory location. If the Delivery Method is Specified Pickup Directory then the path to the Directory Name needs to be specified in the **Directory Name** field.

### Port:

The SMTP Server Port number needs to be mentioned for outgoing mails. The SMTP client initiates a TCP connection to server's port 25. However some servers may have their own configurations e.g. Gmail uses port SMTP number 465.

### Directory Type:

If *Specified Pickup Directory* is selected as the Delivery Method, then the path to the Directory Name needs to be specified in this field.

### Authentication Type:

The options available are **Anonymous, Basic and NTLM**. Using anonymous authentication, there is no way to verify the sender; basic authentication allows clear text user names and passwords for authentication. NLTM or Integrated Windows Authentication only works in configurations where the client computer can contact a domain computer to validate their credentials. In most firewall configurations, it is not possible. There are also other options that the user can choose based on the requirements of the company.

## Default Email Message

Enter or modify the default text to be sent with emails generated from BillQuick HR.

## Security

### SECURITY OVERVIEW

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The Security module is used to set permissions and implement security throughout BillQuick HR. It is set on a user-by-user basis. The modules listed below are available for setting up security permissions.

- [Master Review Form](#)
- [Benefit List](#)
- [Journal Status List](#)
- [Journal Types List](#)
- [Forms Screen](#)
- [Preferences Screen](#)
- [Company Information](#)
- [Master Information Screen](#)
- [Employee Contacts](#)
- [Payroll Screen](#)
- [Master Review Screen](#)
- [Incidents Screen](#)
- [Salary History](#)
- [Assign Benefits](#)
- [Standard Reports](#)
- [Benefit Usage](#)
- [Journal Screen](#)
- [Termination Screen](#)
- [Integration](#)
- [Security Screen](#)
- [Attachments](#)
- [Personal Time Off](#)

## Reference

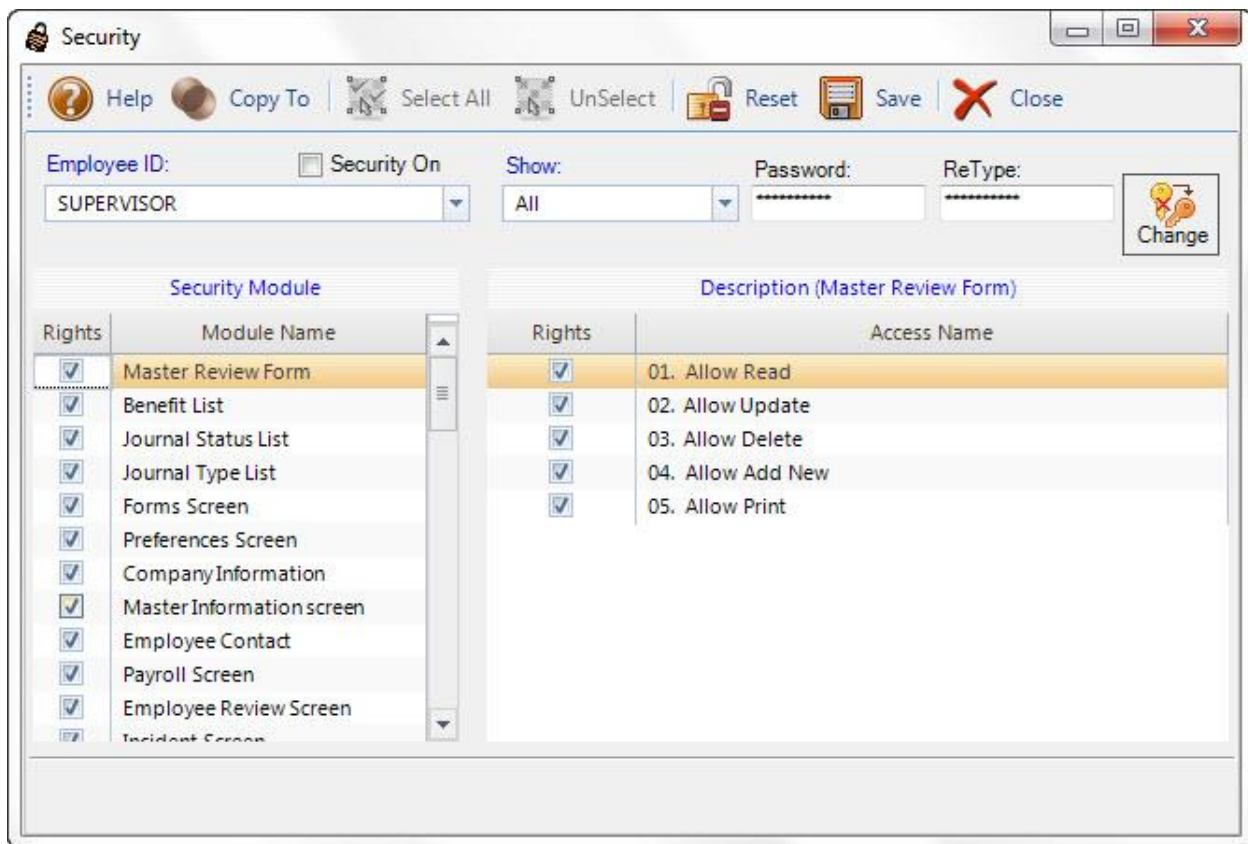
### SECURITY

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You can limit access to specific screens in BillQuick HR for specific users. Irrespective of whether BillQuick HR is used on a single machine or on a network setting, the BillQuick HR database can be protected from misuse by defining the appropriate access permissions for BillQuick HR users.

When security is turned on, BillQuick HR allows access to various parts of BillQuick HR depending on their rights set by the Supervisor. Only the Supervisor can set this option off or on.

From this screen the [Supervisor](#) can assign and change user passwords and grant or terminate security permissions for any employee with [BillQuick HR User](#) status.



Together, the permissions set here make up a user's security profile.

### Security On:

This checkbox is only visible when *Supervisor* is selected in the *Employee ID* drop-down list. When checked the BillQuick HR security is turned on and a login is required to open BillQuick HR. If unchecked, access to the application is unrestricted. It is strongly recommended that you assign security permissions, as soon after your company's core information is setup. If security is not enforced, all records can be accessed and changed by any user.



The security status (i.e., Security On/Off) for any logged-in user displays in the main BillQuick HR status bar at the bottom.

### Employee ID:

Select the Employee ID for whom you need to review or assign the security from the drop-down list. The list includes all the employees whose profile has been created in BillQuick HR database. The last item in the drop-down list is the *Supervisor*, automatically generated by BillQuick HR. You can control what is displayed in the employee drop-down list by using the show option.

### Show:

Use this option to filter users displayed in the *Employee ID* drop-down list.

- **All:** When selected, all the employees in BillQuick HR are displayed in the employee drop-down list.

- **BillQuick HR Users:** Select to display employees flagged as BillQuick HR users in the drop-down list. This ensures better security control over the application.

**Password:**

Use to change an employee's password. By default, your password is the same as your Employee ID. It is highly recommended that the employees' passwords be changed once security has been established. Passwords are not case sensitive. When opening BillQuick HR, you will be prompted for your User ID (Employee ID) and password.

Retype is an editable field provided to confirm the password entered in the password field. This field makes it certain that no mistake is made while typing the password. These two fields are non-readable (showing all the characters as asterisk \*).

**Change:**



Click the **Save Password icon** to save the changed password. However, *Save*, on the button panel, needs to be clicked to make the password change permanent.

**Security Module:**

Security Module lists [names of the BillQuick HR modules](#). Use this list to implement security to various parts of BillQuick HR.

Two things are important for implementing the security, first and foremost you need to select the BillQuick HR Module, simply by checking the Rights checkbox on the extreme left of screen. This will show all the underlying user privileges associated with the selected module. These privileges can be granted or restricted to users by checking the corresponding Rights checkbox.

Lists the *Access Name* defined in BillQuick HR for a different modules or screens along with their Rights status. It shows the access rights for the module currently selected in the *Security Module* list. Currently selected module is displayed in brackets with the Description header. The *Rights* field is editable (except, when the *Supervisor* is selected in the Employee field on the top right), and allows the supervisor to check or uncheck a particular item in the list.

**Description (Module Name):**

Lists the *Access Name* defined in BillQuick HR for a different modules or screens along with their Rights status. It shows the access rights for the module currently selected in the *Security Module* list. Currently selected module is displayed in brackets with the Description header. The *Rights* field is editable (except, when the *Supervisor* is selected in the Employee field on the top right), and allows the supervisor to check or uncheck a particular item in the list.

**Security Button Panel**

The following information details the options on the Security button panel.

**Help:**

Opens the BillQuick HR Help in the Security section.

**Copy To:**

Click to copy a user's security profile to other users, saving time and effort. You can copy settings to a Specific Employee, Employees of selected Title or Employees of selected Department.



For example, if a new partner comes into the company, you would simply copy the security profile of an existing partner to create the new security profile. The same process can copy a profile to dozens of users at once by title or department.

**Select All:**

This will select all rights, granting Full Access Rights to all the functions currently displayed in the grid.

**Unselect All:**

Clears all rights, denying access of any kind to all the functions currently displayed in the grid.

**Reset:**

Resets the password or other security settings for the employee to default settings. The user's default password and Employee ID are the same.

**Save:**

Once all of the fields have been completed, click to save the settings and activate the security features.

**Close:**

When the security settings have been assigned, click this button to close the screen.

## SECURITY SETTINGS - ASSIGN BENEFITS

---

If the Assign Benefits screen is made accessible in the [Security Module](#) option (i.e., is NOT red), the following security settings can be applied here.

### Assign Benefits:

Access Name	Description
Allow Read	Allows opening the <i>Assign Benefits</i> screen and viewing the details of different benefits by selecting a benefit in the grid.
Allow Update	Allows modifying the details of an existing record. The <i>Save</i> button is enabled.
Allow Delete	Allows deleting an existing record. The <i>Delete</i> button is enabled.
Allow Add New	The <i>New</i> button is enabled. Allows the user to create and save a new record.
Allow Read, Update, Delete for all Employee Data	Allows the employee to Read, Update, and Delete the benefit records of other employees.

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Allow Print	The <i>Print</i> button on the button panel of the Assign Benefits screen is enabled. The user is allowed to print the assign benefits report.
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### SECURITY SETTINGS - BENEFIT LIST

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If the Benefit List module is made accessible in the [Security Module](#) option (i.e., is NOT red), the following security settings can be applied here.

#### Benefit List:

Access Name	Description
Allow Read	The user has a right to open the <i>Benefit List</i> screen.
Allow Update	The user is allowed to make alterations in the existing benefits.
Allow Delete	The user is allowed to delete an existing benefit.
Allow Add New	The user is allowed to add a new benefit to the benefit list.
Allow Print	The <i>Print</i> button on the button panel of the Benefit List screen is enabled. The user is allowed to print the benefit list report.

---

### SECURITY SETTINGS - BENEFIT USAGE

---

If the Benefit Usage screen is made accessible in the [Security Module](#) option (i.e., is NOT red), the following security settings can be applied here.

#### Benefit Usage:

Access Name	Description
Allow Read	Allows opening the <i>Benefit Usage</i> screen and viewing the details of different employees by selecting an employee in the grid.
Allow Update	Allows modifying the details of an employee. The <i>Save</i> button is enabled.
Allow Delete	Allows deleting an existing record. The <i>Delete</i> button is enabled.

---

Allow Add New	The <i>New</i> button is enabled. Allows the user to create and save a new record.
Allow Read, Update, Delete for all Employee Data	Allows the employee to Read, Update, and Delete the employee records of other employees.
Allow Print	The <i>Print</i> button on the button panel of the Benefit Usage screen is enabled. The user is allowed to print the benefit usage report.

### SECURITY SETTINGS - COMPANY INFORMATION

If the Company Information module is made accessible in the [Security Module](#) option (is NOT **red**), the following security settings can be applied here.

#### Company Information:

Access Name	Description
Allow Read	The user has a right to open the <i>Company</i> screen.
Allow Update	The user is allowed to make alterations in the existing company records.

### SECURITY SETTINGS - EMPLOYEE CONTACT

If the Employee Contacts module is made accessible in the [Security Module](#) option (i.e., is NOT **red**), the following security settings can be applied here.

#### Employee Contacts:

Access Name	Description
Allow Read	Allows opening the <i>Employee Contact</i> screen and viewing the details of different employees by selecting an employee in the grid.
Allow Update	Allows modifying the details of an employee contact. The <i>Save</i> button is enabled.
Allow Delete	Allows deleting an existing employee contact. The <i>Delete</i> button is enabled.

Allow Add New	The <i>New</i> button is enabled. Allows the user to create and save a new employee contact.
Allow Read, Update, Delete for all Employee Data.	Allows the employee to Read, Update, and Delete the employee contacts of other employees.
Allow Print	The <i>Print</i> button on the button panel of the Employee Contact screen is enabled. The user is allowed to print the employee contact report.

### SECURITY SETTINGS - ATTACHMENTS

If the Attachments screen is made accessible in the [Security Module](#) option (i.e., is NOT red), the following security settings can be applied here.

#### Attachments:

Access Name	Description
Allow Read	Allows opening the Attachment screen and viewing the details of different employees by selecting an employee in the grid.
Allow Update	Allows modifying the details of an employee. The <i>Save</i> button is enabled.
Allow Delete	Allows deleting an existing record. The <i>Delete</i> button is enabled.
Allow Read Others	Checked, the user is able to view all the files attached with a record, else only those files will be viewed that are attached by a logged in user.

### SECURITY SETTINGS - FORMS

If the Forms module is made accessible in the [Security Module](#) option (i.e., is NOT red), the following security settings can be applied here.

#### Forms:

Access Name	Description
Allow Read	The user has a right to open the <i>Forms</i> screen.
Allow Update	The user is allowed to make alterations in the

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existing records.

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## SECURITY SETTINGS - INCIDENT

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If the Incidents screen is made accessible in the [Security Module](#) option (i.e., is NOT red), the following security settings can be applied here.

### Incidents:

Access Name	Description
Allow Read	Allows opening the <i>Incident</i> screen and viewing the details of different employees by selecting an employee in the grid.
Allow Update	Allows modifying the details of an employee. The <i>Save</i> button is enabled.
Allow Delete	Allows deleting an existing record. The <i>Delete</i> button is enabled.
Allow Add New	The <i>New</i> button is enabled. Allows the user to create and save a new record.
Allow Print	The <i>Print</i> button on the button panel of the Incident screen is enabled. The user is allowed to print the incident screen report.
Allow Read, Update, Delete for all Employee Data	Allows the employee to Read, Update, and Delete the employee records of other employees.

## SECURITY SETTINGS - INTEGRATION

---

If the Integration feature is made accessible in the [Security Module](#) option (i.e., is NOT red), the following security settings can be applied here.

### Integration:

Access Name	Description
Allow Get Employee Data	Allows the user to get employee data from BillQuick application into BillQuick HR.

## SECURITY SETTINGS -JOURNAL

---

If the Journal screen is made accessible in the [Security Module](#) option (i.e., is NOT red), the following security settings can be applied here.

### Journal:

Access Name	Description
Allow Read	Allows opening the <i>Journal</i> screen and viewing the details of different employees by selecting an employee in the grid.
Allow Update	Allows modifying the details of an existing journal. The <i>Save</i> button is enabled.
Allow Delete	Allows deleting an existing journal. The <i>Delete</i> button is enabled.
Allow Add New	The <i>New</i> button is enabled. Allows the user to create and save a new journal.
Allow Read, Update, Delete for all Employee Data	Allows the employee to Read, Update, and Delete the journals of other employees.
Allow Print	The <i>Print</i> button on the button panel of the Journal screen is enabled. The user is allowed to print the Journal screen report.

## SECURITY SETTINGS -JOURNAL TYPES LIST

---

If the Journal Types List module is made accessible in the [Security Module](#) option (i.e., is NOT red), the following security settings can be applied here.

### Journal Types List:

Access Name	Description
Allow Read	The user has a right to open the <i>Journal Type List</i> screen.
Allow Update	The user is allowed to make alterations in the existing journal type.
Allow Delete	The user is allowed to delete an existing journal type.

Allow Add New	The user is allowed to add a new journal type to the activity codes list.
Allow Print	The <i>Print</i> button on the button panel of the Journal Type List screen is enabled. The user is allowed to print the journal type list report.

### SECURITY SETTINGS - JOURNAL STATUS LIST

If the Journal Status List module is made accessible in the [Security Module](#) option (i.e., is NOT **red**), the following security settings can be applied here.

#### Journal Status List:

Access Name	Description
Allow Read	The user has a right to open the <i>Journal Status List</i> screen.
Allow Update	The user is allowed to make alterations in the existing journal status.
Allow Delete	The user is allowed to delete an existing journal status.
Allow Add New	The user is allowed to add a new journal status to the journal status list.
Allow Print	The <i>Print</i> button on the button panel of the Journal Status List screen is enabled. The user is allowed to print the journal status list report.

### SECURITY SETTINGS - MASTER INFORMATION

If the Master Information module is made accessible in the [Security Module](#) option (i.e., is NOT **red**), the following security settings can be applied here.

#### Master Information:

Access Name	Description
Allow Read	Allows opening the <i>Master Information</i> screen and viewing the details of different employees by selecting an employee in the

	grid.
Allow Update	Allows modifying the details of an employee. The <i>Save</i> button is enabled.
Allow Delete	Allows deleting an existing employee. The <i>Delete</i> button is enabled.
Allow Add New	The <i>New</i> button is enabled. Allows the user to create and save a new employee.
Allow Read, Update, Delete for all Employee Data	Allows the employee to Read, Update, and Delete the employee records of other employees.
Allow Read, Update, Delete for Employee who I manage	If the employee is a manager for one or more employees, this right enables him/her to Read, Update or Delete the managed employee.
Allow View Contacts	Allows the user to view the contacts
Allow View Benefits	Allows the user to view the benefits
Allow View Journal	Allows the user to view the assigned journal
Allow view/edit Documents	Allows the user to view and edit the documents

### SECURITY SETTINGS - MASTER REVIEW

If the Master Review Form module is made accessible in the [Security Module](#) option (i.e., is NOT red), the following security settings can be applied here.

#### Master Review Form:

Access Name	Description
Allow Read	The user has a right to open the <i>Master Review Form</i> screen.
Allow Update	The user is allowed to make alterations in the existing records.
Allow Delete	The user is allowed to delete an existing master review form record.
Allow Add New	The user is allowed to add a new master



	review form record to the existing list.
Allow Print	The <i>Print</i> button on the button panel of the Master Review Form screen is enabled. The user is allowed to print the master review form report.

## SECURITY SETTINGS - PAYROLL

If the Employee Payroll screen is made accessible in the [Security Module](#) option (i.e., is NOT red), the following security settings can be applied here.

### Payroll:

Access Name	Description
Allow Read	The user has a right to open the <i>Payroll</i> screen.
Allow Update	The user is allowed to make alterations in the existing payroll records.
Allow Delete	The user is allowed to delete an existing payroll record.
Allow Read, Update, Delete for all Employee Data	The user is allowed to Read, Update, Delete a payroll record from the existing list.
Allow Print	The <i>Print</i> button on the button panel of the Payroll screen is enabled. The user is allowed to print the payroll report.

## SECURITY SETTINGS - PERSONAL TIME OFF

If the Personal Time Off module is made accessible in the [Security Module](#) option (i.e., is NOT red), the following security settings can be applied here.

### Personal Time Off:

Access Name	Description
Allow Read	Enables reading and viewing the data on the screen.

Allow Update	Enables modifying the existing data entered on the screen.
Allow Print	Enables the user to print the personal time off report.
Allow Delete	Enables the user to delete a personal time off request.
Allow Add New	Allows the user to create a personal time off request.
Allow Approve/Unapprove/Reject	The <i>Approve/Reject</i> buttons are enabled. The user is allowed to approve, unapprove or reject the personal time of requests.
Allow Read, Update for all Employee Data.	Enables the employee to Read, Update the employee records of other employees.
Allow Read, Update for Emp who I manage.	If the employee is a manager for one or more employees, this right enables him/her to read, update the managed employees.

## SECURITY SETTINGS - PREFERENCES

If the Preferences module is made accessible in the [Security Module](#) option (i.e., is NOT red), the following security settings can be applied here.

### Preferences:

Access Name	Description
Allow Read	The user has a right to open the <i>Preferences</i> screen.
Allow Update	The user is allowed to make alterations in the existing Preferences records.

## SECURITY SETTINGS - SALARY HISTORY

---

If the Salary History screen is made accessible in the [Security Module](#) option (i.e., is NOT red), the following security settings can be applied here.

### Salary History:

Access Name	Description
Allow Read	Allows opening the <a href="#">Salary History</a> screen and viewing the salary history details of different employees by selecting an employee in the grid.
Allow Update	Allows modifying the details of an employee. The <i>Save</i> button is enabled.
Allow Delete	Allows deleting an existing salary history record. The <i>Delete</i> button is enabled.
Allow Add New	The <i>New</i> button is enabled. Allows the user to create and save a new salary history record.
Allow Read, Update, Delete for all Employee Data	Allows the employee to Read, Update, and Delete the salary history records of other employees.
Allow Print	The <i>Print</i> button on the button panel of the Salary History screen is enabled. The user is allowed to print the salary history report.

## SECURITY SETTINGS - SECURITY

---

If the Security screen is made accessible in the [Security Module](#) option (i.e., is NOT red), the following security settings can be applied here.

### Security:

Access Name	Description
Allow Read	Allows opening the <a href="#">Security</a> screen and viewing the security settings assigned to the users.
Allow Update	Allows modifying the security settings of the users.
Allow Turn Security on/off	The box <i>Turn on security</i> is enabled. The user is allowed to change the status of this check box and turn on/off the security.

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Allow for Self Only      Allows changing own password only.

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## SECURITY SETTINGS - STANDARD REPORTS

---

If the standard reports are made accessible in the [Security Module](#) option (i.e., is NOT red), the following security settings can be applied here.

### Standard Reports:

Access Name	Description
Allow Read	View information on the screen.
Company Reports	Allows access to Company Reports.
Employee Reports	Allows access to Employee Reports.

## SECURITY SETTINGS - TERMINATION

---

If the Employee Termination screen is made accessible in the [Security Module](#) option (i.e., is NOT red), the following security settings can be applied here.

### Termination:

Access Name	Description
Allow Read	Allows opening the <a href="#">Termination</a> screen and viewing the details of different employees by selecting an employee in the grid.
Allow Update	Allows modifying the details of an employee. The <i>Save</i> button is enabled.
Allow Print	The <i>Print</i> button on the button panel of the Termination screen is enabled. The user is allowed to print the Termination screen report.

## How Do I

### HOW DO I ASSIGN ACCESS RIGHTS TO USERS?

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When security has been enabled, you may want to customize the access rights each [BillQuick HR User](#) has. Do the following to assign Security permissions to an employee or vendor:



You must log in as the Supervisor to assign access rights.

1. Select Company, Security Screen.
2. Select a BillQuick HR User from the Employee ID drop-down list.



Select *BillQuick HR Users* from the Show drop-down list to filter the names in the Employee ID drop-down list.

3. Select the checkbox for the modules (e.g., Personal Time Off ) you want to give the user access.
4. If you want to give the user only certain rights for a module (e.g., Add, Delete, Approve, etc.), select the check boxes for those access rights listed in the right panel.

### HOW DO I COPY SECURITY SETTINGS TO MULTIPLE EMPLOYEES?

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Do the following to simultaneously apply security settings to multiple employees:

1. Log into BillQuick HR as the [Supervisor](#).
2. Select Company, Security Screen.
3. Select a BillQuick HR User from the Employee ID drop-down list.
4. Select the Security Module names in the list and start assigning the access rights by checking the relevant options.
5. Click the Copy To button, a panel displays at the bottom of the screen.
6. Choose your options. You can copy the security profile of the selected employee to another Specific Employee, Employees with selected Titles or Employees in the selected Department.
7. Click the Copy button to copy the security settings of the current employee to the selected items.
8. Click Save and then Close to exit.

## REMINDERS

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Reminder is a built-in message system that displays system-generated and user-defined notes based on your computer's system date. There are several modules in BillQuick HR where users can enter reminders.

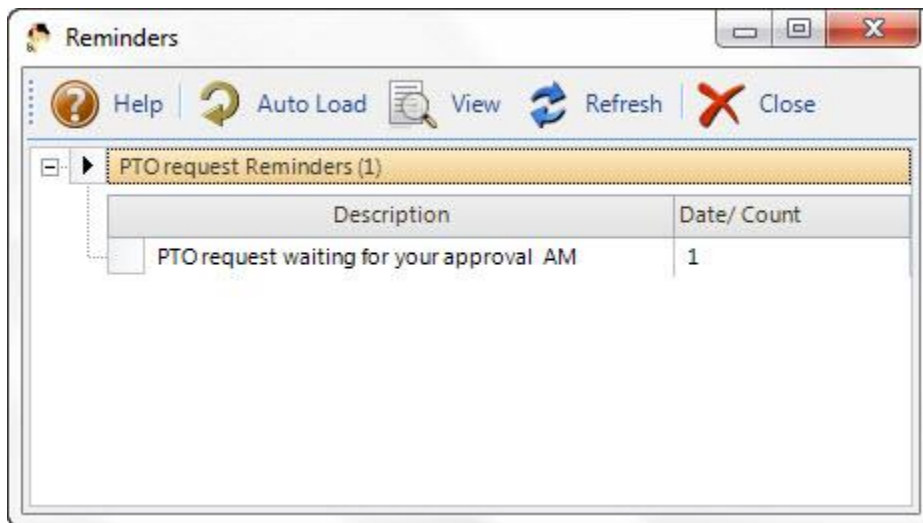
The reminders that you set, appear seven days prior to the date you need to be reminded of, in the Reminders screen. The Reminders screen can be accessed from the company

menu. Click Auto Load, on the Button panel to have the Reminders screen display when you start-up BillQuick HR.

The **Employee** screen creates reminders on the birth dates. A reminder of the birth date appears in the Reminder screen.

Reminders can be set in the **Review** screen. You can set a reminder for the next review date for an employee. Depending upon the date selected in the **Next Review** drop down, you will be reminded of it via the Reminders screen.

You can also get a reminder for the **Salary History** effective date. This enables you to track the employee's salary raise effective date. Depending upon the effective date for the employee, you will be reminded of employees via the Reminders screen.



**Description:**

This column displays the description or the reminder information. For example, *Employee Birth Date Reminder, Employee Salary Effective Dates* etc.

**Date:**

Date related to the descriptive message or reminder. In case of birth date reminders, it may display the birth date of the specified employee.

**REMINDERS BUTTON PANEL**

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**Help:**

Opens the BillQuick HR Help in the Reminders section.

**Auto Load:**

Click this option if you want to open the Reminder screen on BillQuick HR startup.

**View:**

Displays the relevant message details or actual screen pertaining to the reminder description. You need to select an item in the grid and then click this button to view the underlying details.

**Refresh:**

Refreshes the screen with latest updated information.

**Close:**

Closes the Reminders screen.

**Employee****EMPLOYEE OVERVIEW**

Most of the time you work with BillQuick HR, you are using the Employee screen and the related information. The Employee screen allows you to create and maintain a profile of each employee in your organization. The information can be used on reports and in keeping track of the other HR related operations. This screen enables you to create employees, edit information and view the employee profile.

The grid to the left displays the list of all employees whose information is stored in the system. There are two tabs for you to view/enter information. The tabbed grids at the bottom of the screen summarize the related information of the selected employee in terms of contacts, journals and benefits.

The screenshot shows the 'Employee' window in BillQuick HR. On the left is a grid of employees with columns for ID and Last Name. The main area is divided into 'General' and 'Details' tabs. The 'General' tab shows fields for Employee ID (BW), SSN (555-45-8888), Name (Mr Bert Woolmer), Department (Marketing), Title (Director), Gender (Male), Manager (AM), Status (Active), Birth Date (05/30/1970), Pay Rate (\$40.00), OT (\$60.00), Hired (03/07/2010), Bill Rate (\$110.00), and OT (\$165.00). There is also a photo of Bert Woolmer and a checkbox for 'BillQuick HR User'. At the bottom, there are tabs for 'Contacts', 'Benefits', 'Journal', and 'Documents'. The 'Contacts' tab shows a table with columns for Name, Relation, Phone, and Cell Phone.

ID	Last Name
BW	Woolmer
CJ	James
JA	Arlington
MK	Kerns
RA	Annbach
RC	Curtis
RT	Thomas
SB	Beth
SE	Annbach
SL	Lawrence
SQ	Quill
WB	Birch
AM	Marcello
BD	Duncan

Name	Relation	Phone	Cell Phone
Becky Woolmer	Mother	(310) 555-1212	(310) 555-1414

**Employees List:**

Displays all employee records. Highlight a record to modify it. This list can be sorted by the column headers. Click the header by which you want to sort the list.

**Show Active Only:**

Select this checkbox to display only employees with an active status.

**Get Employee From BillQuick:**

Click this link to transfer employees from BillQuick to BillQuick HR. Using this option reduces data entry time and prevents errors.

The Employee screen has two tabs:

**General Tab:** Enter or modify employee information such as title, status, manager, pay rate, etc.

**Details Tab:** Enter or modify an employee's address and contact information on this tab. You can also add comments on the employee.

**Summary Grid**

In addition to the above there is a grid provided at the bottom that leads to some additional details. By selecting the required tab and double-clicking an item listed in the grid leads the user from the Employee Screen to the [Employee Contact Screen](#), [Employee Benefit Screen](#) or [Employee Journal Screen](#).

**Contacts Tab:**

A list of employee contacts. This list is taken from the [Employee Contacts](#) screen. The fields that are visible here are Name of the contact, the relation to the employee, Phone and cell phone numbers. Double-clicking a record listed in the grid, opens up the Contact screen with the specific data.

**Benefits Tab:**

A list of employee benefits. In the [Assign Benefits](#) screen a set of benefits can be assigned to the employee. The benefits that the selected employee is eligible for are displayed in this grid. For each benefit, the name, start date and end date is displayed. You will also be provided with the information about the accrued hours related to the benefit. The data under the accrued column represents the accrued hours as specified in the benefit list. The accrued hours column depicts the periodically accumulated data on an hourly basis. Double-clicking a listed item opens up the Benefit usage screen with the specific data.

**Journal Tab:**

A list of employee journals. The [Journals](#) that have been created for this particular employee are listed here. Double-clicking on a listed record opens the Journal screen with the specific data.

**Documents Tab:**

A list of employee documents. Much detail of the organization's work or an employee's personal data is recorded through these documents. This official reference facility helps the user to store documents such as CV, passport forms, key departmental papers etc.

The user can store the exact location of the document in the **Document Path**. The **Document Type** tags a particular category with the document e.g. CV, performance review etc. The **Date Modified** displays the date your document was last updated. By selecting the required tab and double clicking the navigation grid leads the user to the required document.



## EMPLOYEE - GENERAL TAB

The General tab contains basic employee information. The Employee ID, First Name and Last Name fields are required on this screen.

ID	Last Name
BW	Woolmer
CJ	James
JA	Arlington
MK	Kerns
RA	Annbach
RC	Curtis
RT	Thomas
SB	Beth
SE	Annbach
SL	Lawrence
SQ	Quill
WB	Birch
AM	Marcello
BD	Duncan

Name	Relation	Phone	Cell Phone
Becky Woolmer	Mother	(310) 555-1212	(310) 555-1414

### Employee ID: (required)

Each employee in your Company file must have a unique Employee ID. If you enter an ID that already exists as an employee, you will be prompted to enter a different employee ID. You are allowed to use up to 65 alphanumeric characters to identify an employee, but it is recommended to use shorter IDs as they are easier to use. For example, an employee named Chris Riley can be assigned an employee ID of **CR**. Some offices prefer using numeric employee IDs. You can also create IDs with mixed case.

Click on one of the column headers (i.e., employee ID, last name, first name etc.) to sort the employee list in ascending or descending order.

### SSN (Social Security Number):

The employee's Social Security number.

### Name:

The employee's salutation (e.g. Mr., Mrs., Dr., etc.). You can either type it or select from the drop-down list. The field size should not exceed 4 characters.

### First Name: (required)

The employee's first name.

**MI:**

The employee's middle initial.

**Last Name: (required)**

The employee's last name.

**Department:**

The employee's department, the departments entered will be added as a drop-down list item.

**Title:**

Enter or select the employee's title from this drop-down list.

**Job Description:**

You can define the job in detail by providing a suitable text description for it.

**Gender**

Specify the employee's gender in this field.

**Company:**

The name of the company for which the employee works.

**Manager:**

You may want to designate a manager or a supervisor for each employee. Select the manager for the selected employee from this drop-down list.

**Email:**

Enter the employee's email address in this field. Double-clicking the address in this field to opens your default email program.

**Status:**

Select the employee's working status from this drop-down list. The options are Active/ Inactive/ Terminated.



Deleting an employee record deletes all the data associated with the employee. The better technique is to change the employee's status to Terminated or Inactive. A terminated or inactive employee won't be available in any other screen. However, BillQuick HR keeps the information associated with that Employee. You can make an employee active again at any time.

**Birth Date:**

Enter the employee's birth date in this field.

**Employee Picture**

The employee's photograph is displayed here. You can add any image with the extensions .bmp/.jpg/.jpeg/.gif/ .png.

**Add Picture:**

Click this link to add a new photograph.

**Remove Picture:**

Click this link to remove the previous photograph.

**BillQuick HR User**

When [Security](#) is enabled, only BillQuick HR users can log in. Select this checkbox to designate an employee as a BillQuick HR user.



The number of employees you are allowed to mark as users is determined by the BillQuick HR license you have purchased.

**Other**

**Pay Rate:**

The employee's default hourly pay rate. It's the most common rate that the employee is paid by the company.

**OT:**

The employee's default hourly overtime pay rate.

**Hired:**

The date on which the employee started working with the company.

**Bill Rate:**

The employee's default hourly bill rate. This is the rate the employee is billed at per hour of work.

**OT:**

The employee's default hourly overtime bill rate. The rate that the employee is billed at per hour of overtime work.

**Released:**

Date the employee was released from employment with your company. When you enter a Released date, be sure to change the employee status to Terminated to remove the employee from the drop-down lists throughout BillQuick HR.

## EMPLOYEE - DETAILS TAB

Enter or modify an employee's address and contact information on this tab. You can also add comments on an employee.

ID	Last Name
BW	Woolmer
CJ	James
JA	Arlington
MK	Kerns
RA	Annbach
RC	Curtis
RT	Thomas
SB	Beth
SE	Annbach
SL	Lawrence
SQ	Quill
WB	Birch
AM	Marcello
BD	Duncan

Name	Relation	Phone	Cell Phone
Becky Woolmer	Mother	(310) 555-1212	(310) 555-1414

### Address

#### Street 1/2:

Two lines are available to enter employee's home street name, apartment number etc. Where necessary, use the second line.

#### City:

Enter the employee's city.

#### State:

The 2 or 3 letter abbreviated name of your employee's state. State (or Province) is automatically added to the drop-down list as you set up employees. Select a state from the drop-down list or add new.

#### Zip:

The employee's zip code or postal code.

#### Country:

The employee's country.

**URL:**

Enter your employee's website address.

**Contacts**

**Phone:**

The employee's phone number.

**Home Phone:**

The employee's home telephone number.

**Cell:**

The employee's cell phone number.

**Pager:**

The employee's pager number.

**Fax #:**

The employee's fax number.

**Custom 1/2/3:**

Use these custom fields to add additional information for an employee.

**Memo:**

Use the memo box to record comments on an employee. Employees have their own memo field with unlimited space so your text can be as long as needed. The memo box can be resized.

**EMPLOYEE CONTACTS**

---

**Navigation** *Employee Menu, Contacts*

BillQuick HR allows you to store multiple contacts for any employee. You can maintain a comprehensive list of all employee contacts. It offers you the flexibility of entering as many contacts as needed. You can add both personal or business contacts.

Full contact information is given including name, postal address, telephone, fax and other supporting information.

This screen can also be accessed by double-clicking a name in the Employee's [Contacts list](#).

**Employee ID:**

This field contains the ID of the employee the contact is associated with. This is a non-editable field. You select an employee from the grid (on the left side of the screen), and the information for the selected employee is displayed on the screen.

**Relation:**

Specify the relationship of the contact person to the employee (e.g., Spouse, Father, Mother, Daughter, Son, Friend, etc.).

**Contact Name:**

The name of the employee's contact.

**Emergency Contact:**

Select this checkbox to designate a person as an emergency contact.

**Contact's Information**

**Street 1/2:**

Two lines are available to enter the contact's home street name, apartment number etc. Where necessary, use the second line.

**City:**

The contact's city.

**State:**

Select the contact's state from this drop-down list.

**Zip:**

The contact's zip code or postal code.

**Country:**

The contact's country.

**Work Phone:**

The contact's work phone number.

**Home Phone:**

This field contains the contact's residential phone number.

**Cell Phone:**

This field contains the contact's personal telephone number.

**Fax:**

The contact's fax number.

**Attachments:**

BillQuick HR allows you to attach files to the employee contact by clicking on this link. E.g., you may want to scan and attach employee's contact documents to the record for reference.

**Employee Contacts Button Panel**

The following information details the options available on the Employee Contacts button panel.



The button panel can be located at the top or bottom of the screen using the drag and drop feature. This location is memorized in the screen.

**Search:**

This enables you to search for a particular employee already created. Search for an employee in the grid using full or partial ID, person's name in the text box. BillQuick HR jumps to the first match in the list.

**Help:**

Opens the BillQuick HR Help in the Employee Contacts section.

**Print:**

Opens a drop-down list with in-context reports with [Employee Contact List](#) and [Employee Contacts \(Detail\)](#). You can print, preview or cancel the report.

**Layout**

**Auto Fit:**

Lets BillQuick HR automatically adjust the grid list so all columns fit in the grid screen. Else, the grid list columns display at default widths. Regardless of the settings, you can adjust column width manually. By default, this option is on for grids.

**Best Fit:**

Lets BillQuick HR automatically adjust the grid list so that the columns fit the contents.

**Save:**

Saves information as entered on the Employee contacts screen.

**Cancel:**

Cancels any data that is being entered for an employee contact.

**Delete:**

To delete a contact, bring the record to the screen by selecting it in the grid and click this button.

**New:**

Click to enter a new employee contact information into BillQuick HR.

**Close:**

Click to close the Employee contacts screen. Be sure to click on Save before closing to save your changes.

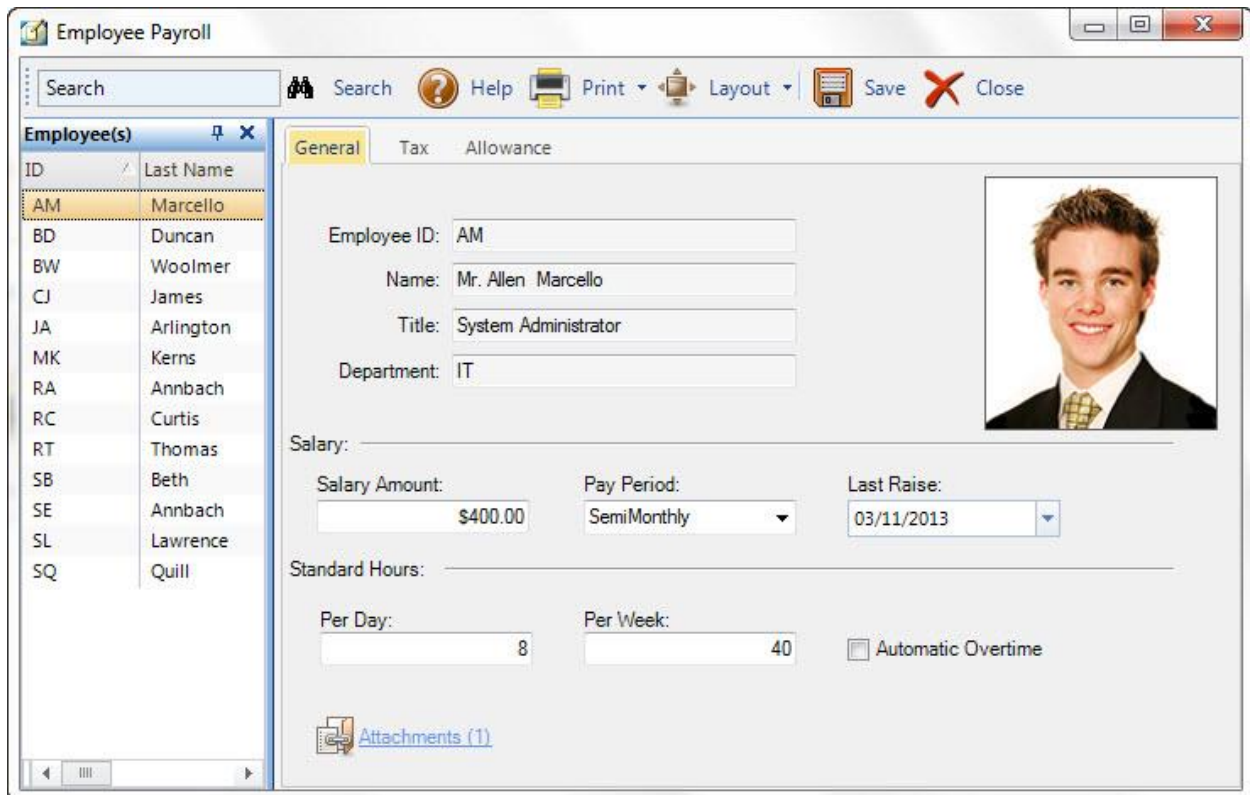
**Show Grid:**

Clicked to display the employee grid when it is hidden. This button only displays when the grid has been closed.

**Payroll**

**EMPLOYEE PAYROLL OVERVIEW**

Employee Payroll is a financial record of employee's salary, net pay, raises and other associated data. BillQuick HR maintains a list of everything that affects the amount on a payroll check, allowing you to view any employee's record and keep track of all the information in an organized and uncluttered manner.





**Employee List:**

Displays all employee records. Highlight a record to make modifications to it. This list can be sorted by the column headers. Click the header by which you want to sort the list.

This screen has three tabs:

- [General Tab](#)
- [Tax Tab](#)
- [Allowance Tab](#)

**EMPLOYEE PAYROLL - GENERAL TAB**

Enter the basic information which is required before processing a payroll check on this tab. The fields on this screen are mandatory.

The screenshot shows the 'Employee Payroll' application window. On the left, a table lists employees:

ID	Last Name
AM	Marcello
BD	Duncan
BW	Woolmer
CJ	James
JA	Arlington
MK	Kerns
RA	Annbach
RC	Curtis
RT	Thomas
SB	Beth
SE	Annbach
SL	Lawrence
SQ	Quill

The 'General' tab is active, showing the following information for employee AM:

- Employee ID: AM
- Name: Mr. Allen Marcello
- Title: System Administrator
- Department: IT
- Salary Amount: \$400.00
- Pay Period: SemiMonthly
- Last Raise: 03/11/2013
- Standard Hours: Per Day: 8, Per Week: 40
- Automatic Overtime:

**Employee ID:**

The ID of the employee that you have selected from the grid is displayed here.

**Name:**

Enter the employee's name in this field.

**Title:**

Enter the title of the employee's position in this field.

**Department:**

Enter the department in which the employee works in this field.

**Salary**

**Salary Amount:**

The employee's salary amount.

**Pay Period:**

The employee's pay period frequency.

**Last Raise:**

Date the employee received his or her last raise.

**Standard Hours**

**Per Day/week:**

Number of standard hours an employee works per day/week. You can enter decimal values.

**Automatic Overtime:**

Select this checkbox if the selected employee gets paid overtime.

**Attachments**

Click this link to attach to the record. For example, you may want to scan and attach employee's payroll documents to the record for reference.

**EMPLOYEE PAYROLL - TAX TAB**

---

BillQuick HR maintains a list of everything that affects the amount on a payroll check. The information on the Tax tab of the Employee screen is most useful for exporting data to a payroll software program or for an electronic submission to a payroll processing service.

Being a federal republic, the United States has autonomous state and local governments. Hence, taxes are imposed here at each of these levels. These include taxes on income, property, sales, imports, payroll, etc. An employer is required to withhold federal, state and local income tax from your employees' payroll. On this tab, you can specify the applicable taxes and allowances for an employee as required by the taxing jurisdiction.

The following are descriptions of fields on the Employee-Tax screen:

The screenshot shows the 'Employee Payroll' window with the 'Tax' tab selected. On the left, a list of employees is shown with 'AM Marcello' selected. The main form area is divided into sections for Federal, State, and Local tax information. The Federal section includes a status dropdown set to 'SINGLE', an allowances field set to '20', and an extra withhold field set to '\$10.00'. There are checkboxes for 'Deferred', 'FUTA', 'Inc Tax', 'Medicare', 'Soc Sec', and 'Pension'. The State section includes a status dropdown set to 'SINGLE', an allowances field set to '5', and an extra withhold field set to 'CA'. It also has dropdowns for 'Disability: CA', 'Unemp: CA', and 'Withholding: CA', along with a 'W2 ID: CA' dropdown. The Local section includes a status dropdown set to 'SINGLE', a 'W2 ID: CA' dropdown, and an allowances field set to '5'. At the bottom, there are input fields for 'State Dis Ins', 'State Unemp Ins', 'State Withhold', and 'State Misc'.

## Federal

The federal government requires you to deposit the withheld amounts, along with the matching employer contributions, if any. Federal taxes include income tax, social security, Medicare, FUTA, excise, etc. You must select the taxes that apply to an employee, whether they are paid by your company (such as FUTA tax) or withheld from your pay.

### Status:

The employee's marital status for federal income tax purposes. Choose one of the options from the drop-down list-Single, Married or Head of Household.

### Allowances:

Number of allowances claimed by the employee for federal income tax purposes. It can be 1, 2 or more. You can increase the amount of federal income tax withheld from your paycheck by reducing the number of allowances.

### Extra Withhold:

You can increase the amount of federal income tax withheld from your paycheck by requesting an additional amount to be withheld from your pay check. You can use extra withholding on one type of income (such as payroll) to avoid paying estimated tax on another type (such as interest).

### Deferred:

Checked, it indicates that the deferred tax is applicable for an employee. Deferred income tax represents amount of income tax payable by an employee at a later date.

**FUTA:**

Checked, it indicates that FUTA tax will be paid by the company for an employee. The Federal Unemployment Tax Act (FUTA) provides for payments of unemployment compensation to workers who have lost their jobs. Only employers are subjected to a FUTA tax liability; it is not deducted from the employee's wages. Most employers pay both a federal and state unemployment tax. Contact your state tax agency for more information.

**Inc Tax:**

Checked, it indicates the federal income tax withholding is applicable for an employee.

**Medicare:**

This is a payroll tax. Checked, it indicates that the medicare tax withholding is applicable for the employee. Medicare requires a matching contribution from the employer (company).

**Social Security:**

This is a payroll tax. Checked, it indicates that the social security withholding is applicable for the employee. All employees are covered by the Federal Insurance Compensation Act (FICA), which provides what is commonly known as social security benefits. A required percentage of your pay is deducted to pay your portion of this protection and requires a matching contribution from the employer (company).

**Pension:**

Checked, it indicates that the pension withholding is applicable for the employee. A Pension plan benefit may or may not be available for employees, depending upon the type of company and its HR policies. If there is a pension plan in place, it requires a matching contribution from the employer (company).

**State**

You must enter state withholding information about the employee. State taxes include income tax, sales tax or capital gains.

**Status:**

The employee's marital status for state income tax purposes. Choose one of the options from the drop-down list-Single, Married or Head of Household.

**Allowances:**

The number of allowances claimed by the employee for state income tax purposes. It can be 1 , 2 or more. You can increase the amount of state income tax withheld from your paycheck by reducing the number of allowances.

**Extra Withhold:**

You can increase the amount of state income tax withheld from your paycheck by requesting an additional amount to be withheld from your pay check. You can use extra withholding on one type of income (such as payroll) to avoid paying estimated tax on another type (such as interest).

**Disability:**

If your company is in a state that collects disability insurance based on employee wages like CA, HI, NJ, NY, etc., this tax maybe paid by the company, employee or both. You must enter the employee's state for disability insurance purposes.

E.g., The State of California requires that a certain percentage of your salary be deducted to pay for this state administered benefit. The plan (SDI) is designed to pay a weekly benefit that partially replaces income lost during a period of disability that prevents you from working.

**UnEmp:**

Your state collects unemployment tax based on employee wages. This tax maybe paid by the company, employee or both. You must enter the employee's state for unemployment insurance purposes.

Unemployment insurance is a government-mandated program that is administered by the federal government (FUTA) and the State of California (SUI). It provides you with a limited income replacement when you are out of work through no fault of your own for a period of up to 26 weeks.

**Withholding:**

Your state requires income tax withholding from the employee's paycheck or salary. You must enter the employee's state for state-level income tax withholding.

**W2 ID:**

W-2 is a payroll tax form issued by employers and stating how much an employee was paid in a year. It is submitted to the state's Social Security Administration showing wages and taxes withheld for the year for an employee. You must enter the state associated with the employee's W-2.

**Local**

These are the local taxes levied by the country or province. They are not mandatory taxes and vary from state to state.

**Status:**

The employee's marital status for local income tax purposes. Choose one of the options from the drop-down list-Single, Married or Head of Household.

**Allowances:**

The number of allowances claimed by the employee for local income tax purposes. It can be 1 , 2 or more. You can increase the amount of local income tax withheld from your paycheck by reducing the number of allowances.

**W2 ID:**

W-2 is a payroll tax form issued by employers and stating how much an employee was paid in a year. It show wages and taxes withheld for the year for an employee. You must enter the county or province associated with the employee's W-2.

## Pay Items

### **State Disability Insurance:**

If your company is in a state that collects disability insurance based on employee wages like CA, HI, NJ, NY, etc., this tax maybe paid by the company, employee or both. This field tracks the employee-paid state disability insurance. E.g., The State of California requires that a certain percentage of your salary be deducted to pay for this state administered benefit. The plan (SDI) is designed to pay a weekly benefit that partially replaces income lost during a period of disability that prevents you from working.

### **State UnEmp Insurance:**

Your state collects unemployment insurance based on employee wages. This tax maybe paid by the company, employee or both. This field tracks the employee-paid state unemployment insurance. Unemployment insurance is a government-mandated program that is administered by the federal government (FUTA) and the State of California (SUI). It provides you with a limited income replacement when you are out of work through no fault of your own for a period of up to 26 weeks.

### **State Withhold:**

Your state requires income tax withholding from the employee's paycheck or salary. This field tracks the state withholding liability to be paid by the employee.

### **State Misc:**

You can use this field to track any miscellaneous state taxes applicable for the employee.

## **EMPLOYEE PAYROLL - ALLOWANCE TAB**

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The Allowance tab of the Employee screen stores information about payroll deductions and automatic deposits. BillQuick maintains a list of everything that affects the amount on a payroll check. This information is most useful for exporting data to a payroll software or an electronic submission to a payroll processing service.

Payroll deductions are either mandatory or voluntary. If your company offers various benefits and schemes, you need to deduct your employees' contributions from their salary. These deductions are shown separately on their pay slips. E.g., your company may have a pension scheme - whether you run it yourself or by a third party. In such a case, you must deduct the employee's contribution from their pay based on the deduction specified here.

The following are descriptions of fields on this screen:

The screenshot shows the 'Employee Payroll' application window. The 'Allowance' tab is active, displaying the following data for employee AM (Marcello):

Deduction:		Percentage	Amount	Percentage	Amount
Pension:		1000	\$10,000.00	Defer Pymt:	70 \$70.00
Medical:		100	\$500.00	Cafeteria:	50 \$50.00
Dental:		60	\$600.00	Ded Amt1:	32 \$32.00
Vision:		100	\$100.00	Ded Amt2:	10 \$10.00

Automatic Deposit: Account #: SBX-123 Routing #: 001  Auto Deposit

## Deduction

### Pension:

The employee's pension deduction or contribution in percentage (%) and amount.

### Medical:

The employee's medical deduction or contribution percentage (%) and amount.

### Dental:

The employee's dental deduction or contribution percentage (%) and amount.

### Vision:

The employee's vision deduction or contribution percentage (%) and amount.

### Defer Payment:

The employee's deferred payment deduction percentage (%) and amount. Deferred payment means that a portion of an employee's salary is paid at a date after which that income is actually earned. The primary benefit of this is the deferral of tax to a date when the employee actually receives the income.

### Cafeteria:

The employee's cafeteria deduction percentage (%) and amount. This contribution towards a cafeteria plan can be used when you incur certain qualified expenses. These expenses are paid out of your pre-tax income, thus reducing your taxable salary.

**Deduction Amount 1/2:**

The employee's miscellaneous deduction percentages (%) and amounts can be specified in these fields.

**Automatic Deposit**

**Auto Deposit:**

This box is checked for an employee if you want to activate the automatic payroll deposit option.

**Account #:**

Number of the bank account into which the employee's pay will be deposited. The field size should not exceed 15 characters.

**Bank Routing #:**

Routing number of the bank which will receive the employee's automatic deposit. The field size should not exceed 15 characters.

**EMPLOYEE REVIEW**

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BillQuick HR provides you with tools to review your employees based on a customized review list which can be used to generate Reports and make intelligent data driven decisions about your employees.

The Employee Review is an important tool in the overall performance management process and in the development of the employee's professional skills. The employee review module enables you to maintain a complete history of reviews including scores for each section the employee was reviewed on. This feature can be used in making decisions on how to best utilize the abilities of an employee to meet your company goals and on how to compensate your employees on the basis of their review.

It is expected that the employee review will be conducted yearly, or as frequently as possible. Employee Reviews help in providing a feedback to the employee as well as the employers.



Graded By	Section	Score	Grade	Notes
CJ	Analysis	8	A	
CJ	Job Knowledge	4	C	
CJ	New Knowledge	6	B	
CJ	Dependability	5	B	
CJ	Organisation	5	B	

**Review Date:**

Displays the date on which the employee was reviewed. Based on the date selected, the rest of the screen would provide the details of that particular review.



When you click **New** on the Button panel, the review date becomes disabled, and the user enters details of a new review in the rest of the fields.

**Reviewer ID:**

The ID of the employee conducting the review. Generally this would be the manager or some person authorized by the manager to do the review.

**Review Type:**

Select the type of the review being conducted from this drop-down list. The review types could be salary review, performance review or general category.

**Date:**

Enter the date of the selected review.

**Next Review:**

The date on which the employee will be reviewed next time.

**Location:**

The place where the review is/was conducted. It can be the name of an office, department, city, country, etc.

**Attachments:**

BillQuick HR allows you to attach files to the selected record by clicking on this link. E.g., you may want to scan and attach employee's documents to the record for reference. You

can add and save files for the selected record from the [Attachments](#) screen by selecting the files or using *drag-n-drop* feature as well.

### Employee Review Grid

In addition to the above details a grid is maintained in the Employee Review Screen where the score obtained on different sections (e.g. Work Knowledge, Attendance etc.) can be given. The score for each section is given in terms of a numeric value and a grade that was accorded to the employee.

#### Graded By:

The ID of the administrator or the supervisor who reviews the effectiveness of the employee and grades him/her accordingly in that particular review area.



The person reviewing the employee on work knowledge could be different from the person who is reviewing the employee on absenteeism; hence, this field allows the IDs of the reviewing authority to be stored here.

#### Section:

The specific area of expertise in which the employee's review is being conducted.

#### Score:

A progress update or the overall rating of the employee's performance.

#### Grade:

Over all ratings are provided to help distinguish between the various areas of performance and to give a clear idea of the employee's follow-up.

#### Notes:

The field is used to note down some additional comments (if any) by the reviewer. Specific examples of strengths and areas to be improved upon are recorded.

### Employee Review Button Panel

The following information details the options on the Employee Review button panel.



The button panel can be located at the top or bottom of the screen using the drag and drop feature. This location is memorized in the screen.

#### Search:

Use this field to search for a particular employee whose review is being conducted. Search for an employee in the grid using the person's full or partial ID, name or title.

#### Help:

Opens BillQuick HR Help in the Employee Review section.

**Print:**

Opens a drop-down with in-context reports for Employee Review History, Employee Review History (detail) and Employee Review Comparison by Type. You can print, preview or cancel the report.

**Layout****Auto Fit:**

Lets BillQuick HR automatically adjust the grid list so all columns fit in the grid screen. Else, the grid list columns display at default widths. Regardless of the settings, you can adjust column width manually. By default, this option is on for grids.

**Best Fit:**

Lets BillQuick HR automatically adjust the grid list so that the columns fit the contents.

**Save:**

Saves information as entered on the Employee Review screen.

**Cancel:**

Cancels any data that is being entered for an employee in the review screen.

**Delete:**

Click this button to delete an employee review record. If you attempt to delete the review record using the Delete key then only the review details selected in the grid are deleted.

**New:**

Click to enter new employee review information into BillQuick HR.

**Close:**

The Close button will close the Employee Review screen. Be sure to click on Save before closing to save your changes.

**Show Grid:**

Click to display the employee grid when it has been hidden or closed. This button only displays when the grid is hidden.

**INCIDENTS**

---

Ensuring employee safety is an essential component of human resource management. It is possible that events can occur with regards to the company's employees which would have legal implications - for example injury at workplace, acts of violence, harassment of employees, etc. Incidents can also be regarded as events that may result in a crisis if not handled properly or on time. The seriousness of these issues entails that a record is maintained and the incidents are reported to the legal authorities.

BillQuick HR helps you keep track of incidents, ensuring that your company fulfills its legal obligations. It also helps you decide on what actions to take.

The screenshot shows the 'Incidents' application window. On the left is a list of employees with columns for ID and Last Name. The main area contains a form for reporting an incident. The 'Incident Type' is set to 'Theft'. The 'Incident Date' is 03/11/2013 and the 'Incident Time' is 06:30 PM. The 'Report Date' is 03/11/2013 and the 'Report Time' is 09:15 AM. The 'Reported By' is AM and the 'Location' is CA. Custom 1 is 'Personal money stolen.' and Custom 2 is 'No compensation from the organisati'. Both 'Incident is closed' and 'Incident is not work related' are checked. The 'Incident Notes' field contains 'Incident took place not during working hours.'. Below the form is an 'Attachments (1)' section with a table listing incident types, dates, and times.

Incident Type	Incident Date	Incident Time
▶ Theft	03/11/2013	6:30:00 PM
Injury	07/21/2009	10:30:00 AM

**Incident Type:**

Select the type of incident that has occurred (e.g., an accident, theft, etc.).

**Incident Date:**

The date on which the incident occurred.

**Incident Time:**

The time at which the incident occurred.

**Report Date:**

The date on which the incident was reported.

**Report Time:**

The time at which the incident was reported.

**Reported By:**

The ID of the employee who reported the incident.

**Location:**

The location/state where the incident occurred.

**Custom 1/2:**

Any other information that you may wish to enter regarding the incident.

**Incident is closed:**

When checked, it implies that the incident under consideration has already been reported. This indicates that all the formalities concerning it have been completed and the incident is now closed.

**Incident is not work related:**

Select to indicate that the incident under review is not work related (i.e. it is an external incident).

**Incident Notes:**

Enter notes in this field to record additional incident information.

**Attachments:**

Click this [Attachments](#) to attach files to the selected record. For example, you may want to scan and attach employee's documents to the record for reference.

**Incident (History) Grid:**

At the bottom of the screen is a grid displaying all the incidents reported for the selected employee. To view more information on any specific incident, click on that row. The details of the incident will be displayed in the Incidents screen.

**Incidents Button Panel**

The following information provides details on the options available on the Incidents button panel.



The button panel can be located at the top of the screen using the drag and drop feature. This location is memorized in the screen.

**Search:**

Use this field to search for a particular employee using that person's full or partial ID, name, title or department in this text box.

**Help:**

Opens BillQuick HR Help in the Incidents section.

**Print:**

Opens a drop-down with in-context reports for [Employee Incidents \(Detail\)](#), [Employee Incident List By Type](#) and [Employee Incident List By Status](#). You can print, preview or cancel the report.

**Layout****Auto Fit:**

Lets BillQuick HR automatically adjust the grid list so all columns fit in the grid screen. Else, the grid list columns display at default widths. Regardless of the settings, you can adjust column width manually. By default, this option is on for grids.

**Best Fit:**

Lets BillQuick HR automatically adjust the grid list so that the columns fit the contents.

**Save:**

Saves information as entered on the Incidents screen.

**Cancel:**

Cancels any data that is being entered for an employee in the Incidents screen.

**Delete:**

Click to delete the currently selected incident record.

**New:**

Click to enter new incident information into BillQuick HR.

**Close:**

Click to close the Incidents screen. Be sure to click on Save before closing to save your changes.

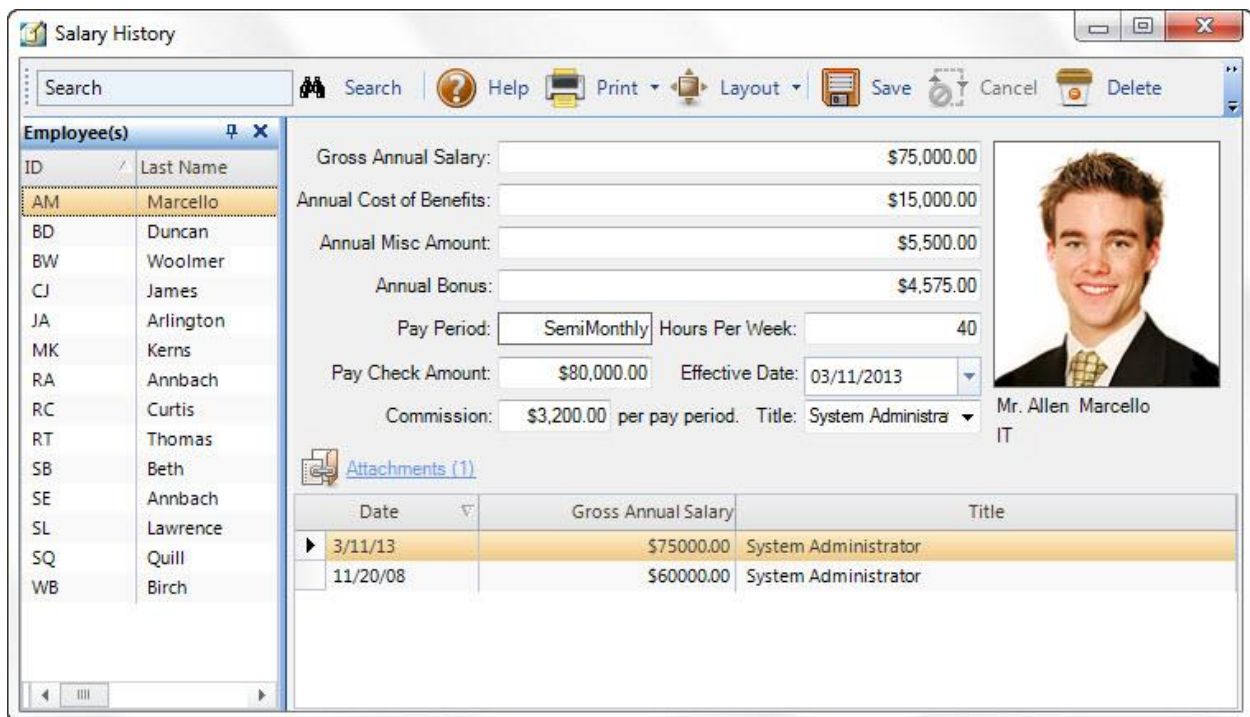
**Show Grid:**

Click to displays the employee grid. This button becomes visible only when the grid is closed.

**SALARY HISTORY**

It is very useful for a company to keep track of how an employee has developed with the company. The employee salary history feature of BillQuick HR allows you to view the salary, title and other details that changed as the employee continues to work with the organization.

This feature allows the user to maintain a history of salary rate per employee and display that detail as a chart. You can also compare the salaries of various employees. You can view the gross salary, the paycheck amount, and the date on which the change in employee salary took place and other details for any employee.



**Gross Annual Salary:**

The employee's annual salary before deductions such as tax or expenses.

**Annual Cost of Benefits:**

The amount that the company has to spend for any benefits provided to the employees.

**Annual Misc Amount:**

Enter any miscellaneous expenses incurred in this field.

**Annual Bonus:**

Enter the amount of money given in addition to normal pay, especially as a reward per the employee's pay period.

**Pay Period:**

Specify the employee's pay period frequency. Pay period is retrieved from Payroll.

**Hours per Week:**

The number of work hours per week.

**Pay Check Amount:**

The amount given to the employee as payment for salary or wages after the usual deductions such as tax or expenses.

**Effective Date:**

The date on which the changes were made in the employee information. This could be a change in title, salary, number of hours per week, etc.

**Commission per Pay Period:**

The employees might provide services for which the company pays them on percentage basis. This amount is entered here.

**Attachments:**

Click this link to attach files to the selected record. For example, you may want to scan and attach employee's salary history documents to the record for reference.

**Salary History Grid**

At the bottom of the screen is the **grid** which displays all the records of salary history for the selected employee. To view details of any specific salary change, click on the row and the relevant information would be available on the screen.

**SALARY HISTORY BUTTON PANEL**

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The following information details the options available on the Salary History button panel.



The button panel can be located at the top of the screen using the drag and drop feature. This location is memorized in the screen.

**Search:**

Use this field to search for an employee which salary details are to be viewed. Enter that person's full or partial ID/name, title or department in this field and press **Enter**.

**Help:**

Opens BillQuick HR Help in the required section.

**Print:**

Opens a drop-down with in-context reports for [Employee Salary History \(Monthly\)](#) [Employee Salary History \(Yearly\)](#) and [Employee Salary by Department \(Monthly\)](#). You can print, preview or cancel the report.

**Layout**

**Auto Fit:**

Lets BillQuick HR automatically adjust the grid list so all columns fit in the grid screen. Else, the grid list columns display at default widths. Regardless of the settings, you can adjust column width manually. By default, this option is on for grids.

**Best Fit:**

Lets BillQuick HR automatically adjust the grid list so that the columns fit the contents.

**Save:**

Saves information entered on the Employee Salary History Screen.

**Cancel:**

Cancels any data that is being entered for an employee in Employee Salary History Screen.

**Delete:**

Click this button to delete a selected employee's salary history.

**New:**

Click to enter a new Employee Salary History record into BillQuick HR.

**Close:**

Click to close the Employee Salary History screen. Be sure to click on Save before closing to save your changes.

**Show Grid:**

Click to display the employee grid list when it has been hidden. This button only displays when the grid has been hidden or closed.

**ASSIGN BENEFITS**

---

This module provides the user with a quick method to assign one or more benefits to a particular employee. A flexible module that is extremely responsive to your unique business needs, it allows you to specify not only which benefits are available to which employee but also to monitor the start and end date for the particular benefit.



Benefit Name	Start Date	End Date
Personal	01/21/2013	01/21/2013
Sick	10/04/2013	10/15/2013
Vac	04/02/2013	05/15/2013
*		

**Employee ID:**

Type or select the ID of the employee from this drop-down list. This field identifies the employee to whom the benefit will be assigned.

**Employee Name:**

The name of the employee to whom the benefit is to be assigned.

**Benefit Name:**

This column identifies the name of the benefit (e.g. vacation, sick, personal, etc). You can select the benefit from this drop-down list.

**Start date:**

Enter the date on which the benefit is assigned to the employee. This is the date the employee would start earning the benefit.



The employee does not start earning the benefit from the day he/she joins the company, but from the start date given here. If you would like the benefit to start the same date as the employee was hired, choose the date he/she was hired as the start date.

**End Date:**

This is the date on which the employee would no longer be eligible for earning benefits. You can leave this field blank if you do not wish to have an end date on benefits earning period.



The benefits earning is measured on accrual basis. Hence if for 1 year an employee earns 6 days leave and the benefit period ends before his first year is complete, say 6 months, the employee would earn 3 days of leave.

The Vac and Sick hours are accrued according to their type set in the Benefit List Screen.

The benefit type field keeps track of the number and type of benefits utilized by an employee. Thus a benefit once used by a particular employee does not appear again in the drop-down list for that employee.

**Attachments:**

Click this link to attach files to the selected record. For example, you may want to scan and attach employee's benefit documents to the record for reference.



You can right click a selected Benefits entry and select Attachments from the pop-up menu.

**Assign Benefits Button Panel**

The following information details the options available on the Assign Benefits button panel.



The button panel can be located at the top or bottom of the screen using the drag and drop feature. This location is memorized in the screen.

**Help:**

Opens the BillQuick HR Help in the Assign Benefits section.

**Print:**

Opens a drop-down with in-context reports with [Employee Benefits List](#). You can print, preview or cancel the report.

**Delete:**

Click to delete the selected benefit record.

**Close:**

The Close button will close the Assign Benefits screen.

**JOURNAL OVERVIEW**

---

With BillQuick HR you can maintain employee journals to keep track of all employee related items (e.g., degrees, achievements, warnings, etc.) and activities (e.g., *Employee won an award, Employee received oral warning from his supervisor, etc.*).

The Journal is intended to assist the supervisors to subsequently monitor the code and conduct of the employees at reasonable intervals. In addition, to keep track of their achievements in their respective fields of expertise. This feature is particularly useful when professional accreditations need to be verified and kept on record.

ID	Last Nam	MI	First Na	Title	Departm
AM	Marcell		Allen	System	IT
BD	Duncan		Bob	Draftsm	Design
BW	Woolm		Bert	Director	Marketi
CJ	James		Curtis	Senior E	Design
JA	Arlingto		Jennifer	Adminis	Adminsi
MK	Kerns		Mark	Jr. Archi	Renderi
RA	Annbac		Rose	Recepti	Adminsi
RC	Curtis		Richard	Senior E	Design
RT	Thomas		Riley	Sr. Archi	Design
SB	Beth		Sarah	Jr. Cons	Develop
SE	Annbac		Rose	Office	Adminsi
SL	Lawrenc		Sally	Jr. Archi	Design
SQ	Quill		Stephen	Manage	Manage
WB	Birch		Walter	General	Adminsi

Record Date	Recorded By	Reported By	Employee ID	Status
03/11/2013	BW	WB	AM	Closed
03/20/2009	BW	WB	AM	Approved

**Journal Type:**

Select a journal type from this drop-down list (e.g. journal pertaining to academic achievements, behavioral norms, etc).

**Record Date:**

The date on which the journal is recorded. Type in the date or by click the drop-down arrow and choose a date from the pop-up calendar.

**Reported by:**

The name of the concerned person reporting this journal is entered in this data field (e.g. team leader).

**Recorded By:**

The name of the concerned person recording this journal is entered in this data field (e.g. team leader, HR Manager, etc).

**Journal Status:**

Select the Journal status from this drop-down list (i.e., open, closed, pending, rejected, approved, etc.). There is a separate screen that keeps track of the journal status which can also be accessed from the Company menu.

**Journal Notes:**

Record any extra information related to the Journal in this field. The text field has unlimited space so that your text can be as long as needed. The box can also be resized on resizing the screen itself.

**Remarks:**

Enter Remarks about the employee here.

**Employee Picture:**

The employee's photograph is displayed here.

**Journal Entries Grid**

As the information is recorded and saved in the various screens; it gets displayed in the form of a grid.

**Attachments:**

Click this link to [attach files](#) to the selected record. For example, you may want to scan and attach employee's journal documents to the record for reference.



You can right click a selected Journal entry and select Attachment from the pop-up menu.

**Journal Button Panel**

The following information details the options available on the Journal button panel.



The button panel can be located at the top of the screen using the drag and drop feature. This location is memorized in the screen.

**Search:**

Use this field to search for a particular employee by entering that person's full or partial ID, name, title or department in this text box and pressing *Enter*.

**Help:**

Opens the BillQuick HR Help in the Journals section.

**Print:**

Opens a drop-down with in-context reports for [Employee Journal \(Detail\)](#) and [Employee Journal Details \(with Notes\)](#). You can print, preview or cancel the report.

**Layout**

**Auto Fit:**

Lets BillQuick HR automatically adjust the grid list so all columns fit in the grid screen. Else, the grid list columns display at default widths. Regardless of the settings, you can adjust column width manually. By default, this option is on for grids.

**Best Fit:**

Lets BillQuick HR automatically adjust the grid list so that the columns fit the contents.

**Save:**

Saves information as entered on the Journals Screen.

**Cancel:**

Cancels any data that is being entered in the Journal Screen.

**Delete:**

Click to delete a selected journal.

**New:**

Click to enter new journal information into BillQuick HR.

**Close:**

Click to close the Journals screen. Be sure to click on Save before closing to save your changes.

**Show Grid:**

Click to display the Employee grid when it has been hidden or closed. This button only displays when the grid is hidden.

**Termination**

**TERMINATION OVERVIEW**

---

BillQuick HR has a special feature to help you maintain HR information such as employee termination. The Employee Termination screen allows you to enter information about an employee's termination, specifying reasons and creating notes which can help you make major HR decisions.

The Employee Termination screen consists of two tabs:

- **General Tab**: The General tab contains basic information on employee termination such as termination type, reason of termination, last date of work etc.
- **Detail Tab**: This tab is used to add more information on an employee's termination such as recommended rehiring, severance description, severance paid etc.

## EMPLOYEE TERMINATION - GENERAL TAB

The General tab of the Employee Termination screen contains basic information about termination.

ID	Last Name
AM	Marcello
BD	Duncan
BW	Woolmer
CJ	James
JA	Arlington
MK	Kerns
RA	Annbach
RC	Curtis
RT	Thomas
SB	Beth
SE	Annbach
SL	Lawrence
SQ	Quill
WB	Birch

Employee ID: WB

Termination Type: Voluntary

Termination Reason: Changing Career path/goals

Last Day Worked: 05/01/2013

Release Date: 04/30/2013

Notes: Was responsible and can be called for any work that requires his expertise.

Attachments (1)

**Employee ID:**

The ID of the selected employee.

**Termination Type:**

Make a selection from this drop-down list to specify whether the employee chose leave the organization voluntarily or was terminated involuntarily.

**Termination Reason:**

Select the reason for the employee's termination from this drop-down list. If none of the options given fit the reason, choose *Other*.

**Last Day Worked:**

Specify the last day the employee reported for work.

**Release Date:**

The date the employee was released from work.

**Notes:**

Enter additional comments regarding the employee's termination in this field.

**Attachments:**

Click this link to attach files a selected record. For example, you may want to scan and attach employee's documents to the record for reference.

**EMPLOYEE TERMINATION - DETAILS TAB**

Use the options on this tab to add more information on an employee's termination.

ID	Last Name
AM	Marcello
BD	Duncan
BW	Woolmer
CJ	James
JA	Arlington
MK	Kerns
RA	Annbach
RC	Curtis
RT	Thomas
SB	Beth
SE	Annbach
SL	Lawrence
SQ	Quill
WB	Birch

Recommended Rehiring: Yes  
 Protest Unemployment: No  
 Severance Paid: No  
 Severance Description:  
 Deceased

**Recommended Rehiring:**

Indicate whether the company should consider re-hiring the employee. For example, if the employee has left work for school, the company might consider rehiring him/her in future.

**Protest Unemployment:**

Enter any protest against unemployment claim is registered here.

**Severance Paid:**

Specify whether the employee was paid severance or not. Severance is the amount paid by the employer to the employee if the employee is laid off or fired.

**Severance Description:**

Enter any additional details about the severance (paid e.g. whether the severance was paid when the employee resigned or was fired, etc.).

**Deceased:**

Select this checkbox if the employee is deceased.

**EMPLOYEE TERMINATION BUTTON PANEL**

---

The following information details the options on the Termination button panel.

The button panel can be located at the top or bottom of the screen using the drag and drop feature. This location is memorized in the screen.



**Help:**

Opens BillQuick HR Help in the Termination section.

**Print:**

Opens a drop-down with in-context reports with [Terminated Employees List](#). You can print, preview or cancel the report.

**Layout**

**Auto Fit:**

Lets BillQuick HR automatically adjust the grid list so all columns fit in the grid screen. Else, the grid list columns display at default widths. Regardless of the settings, you can adjust column width manually. By default, this option is on for grids.

**Best Fit:**

Lets BillQuick HR automatically adjust the grid list so that the columns fit the contents.

**Save:**

Click to save information as entered.

**Terminate:**

Click to terminate the selected employee. However, the employee's ID will remain in the database but will not be available in any other module except [Employee Master Info](#).

**Close:**

The Close button will close the Employee Termination screen. Be sure to click on Save before closing to save your changes.

**PERSONAL TIME OFF REQUEST**

---

BillQuick HR now offers you the ability to keep track of Personal Time Off (PTO) plan as per your company's policy. Personal Time Off is any time not worked by an employee.



Companies grant time off to give employees down time and a chance to deal with non-work related issues. This is a more flexible arrangement that gives the employee a set amount of days off to be used at the employee's discretion.

PTO must be scheduled in advance and approved by the supervisor. PTO may be used for vacation, personal time, illness or time off. The number of hours an employee is eligible for PTO depends on your company policies. For example, the number of PTO hours earned could be based on the number of hours worked and the length of employment with the company.

Whatever your company policy may be, BillQuick HR can accommodate it. The PTO request module is used to request Personal Time Off and submit it for approval to the person in charge.

You can specify Personal time off hours as paid, unpaid and compensation time. Users can specify how much should be paid, unpaid and comp time out of their total hours of Personal time off. Likewise an approver has the authority to decide/change how much hours shall be paid, unpaid or comp hours.

The Personal Time Off Request screen displays the following fields:

**Personal Time Off Request**

Search [ ] Search [ ] Help [ ] Print [ ] Layout [ ] Submit [ ] Cancel [ ] New [ ]

**Employee(s)**

ID	Last Name
AM	Marcello
BD	Duncan
BW	Woolmer
CJ	James
JA	Arlington
MK	Kerns
RA	Annbach
RC	Curtis
RT	Thomas
SB	Beth
SE	Annbach
SL	Lawrence
SQ	Quill

Request Date: 04/01/2013 Submit to: CJ

Start Date: 04/01/2013 End Date: 04/01/2013

Hours: 8 Paid Hours: [ ]

UnPaid Hours: [ ] Comp Hours: 2

Notes: Hospitalized due to food poisoning.

**Attachments (1)**

Submit To	Request Date	Start Date	End Date	Hours
CJ	04/01/2013	04/01/2013	04/01/2013	8

**Benefit Indicators:**

Sick Hours Earned:	2.84	Sick Hours Used:	36.25	Sick Hours Available:	-33.41
Vac Hours Earned:	4.72	Vac Hours Used:	58.00	Vac Hours Available:	-53.28

Mr. Allen Marcello  
IT  
System Administrator

### Request Date:

The date on which the request was made for Personal Time off. By default, the current date is displayed. However, by clicking this drop-down list you can select the date you would prefer to associate the request to.

### Submit To:

Select the Employee that will review and approve/reject the request.



If Employee ID does not match with any of the existing employees, you can create a new employee on the fly using the **Add New** option from the drop-down list.

**Start Date:**

The requested start date of the PTO.

**End Date:**

The end date of the requested PTO period.

**Hours:**

Specify, in hours, the amount of time an employee requested for PTO. For example, if the person is planning to take two days off and with 8 hour working day, then enter 16 hours in this field. You can also use decimal format (e.g. 5.5 = 5 and half hours).

**Paid Hours:**

Specify the number of paid hours to be used. This ensures the employee is paid for the time off for these hours.

**Unpaid Hours:**

Specify the number of hours the employee wants to take time off without pay from the company.

**Comp Hours:**

Specify the number of comp-time hours the employee wants to use as time off.

**Notes:**

Enter additional comments for the personal time off request.

**Attachments:**

Click this link to attach files to the record. For example, you may want to scan and attach employee's documents to the record for reference.

**PTO Request Submission Grid:**

This grid displays the details of the PTO request such as the period of time off requested, who the request was submitted to and the total hours of requested PTO.

**Benefits Indicators:**

The PTO Request screen also displays the sick hours earned, available and used and vacation hours earned, available and used. If the employee has used more than the hours available to him/her, the negative value is displayed in **red color**.

**Sick Hours Earned:**

The number of hours the employee has earned as a sick time. It's calculated in accordance to the data assigned in the benefit details of the benefit list screen and the standard hours of the employee. By default the standard hours are taken as 8 hours otherwise they can be set in the employee payroll form.

**Sick Hours Used:**

The number of sick hours the employee has used up.

**Sick Hours Available:**

The number of sick hours still available to the employee. They are equal to the difference between the earned sick hours and the used sick hours.

**Vac Hours Earned:**

The number of hours the employee has earned as vacation time. It's calculated in accordance to the data assigned in the benefit details of the benefit list screen and the standard hours of the employee. By default the standard hours are taken as 8 hours; otherwise, they can be set in the employee payroll screen.

**Vac Hours Used:**

The number of vacation hours used by the employee.

**Vac Hours Available:**

The number of vacation hours still available to the employee. They are equal to the difference between the earned vacation hours and the used vacation hours.

**Personal Time Off Request Button Panel**

The following information details the options available on the PTO button panel.



The button panel can be located at the top of the screen using the drag and drop feature. This location is memorized in the screen.

**Search:**

Use this field to search for a particular employee using that person's full or partial ID, name, title, or department. Type in the search text and press *Enter*. BillQuick HR jumps to the nearest match in the list.

**Help:**

Opens BillQuick HR Help for PTO Request section.

**Submit:**

Click to submit the request to the PTO approver. You are given an option to notify the approver through an [email](#). In addition, the system sets a reminder in the [Reminder](#) screen.

**Print:**

Opens a drop-down with in-context reports with the [Employee Benefit Usage](#) and [Benefit Usage As of](#). You can print, preview or cancel the report.

**Layout****Auto Fit:**

Lets BillQuick HR automatically adjust the grid list so all columns fit in the grid screen. Else, the grid list columns display at default widths. Regardless of the settings, you can adjust column width manually. By default, this option is on for grids.

**Best Fit Columns:**

Lets BillQuick HR automatically adjust the grid list so that the columns fit the contents.

**Save:**

Saves information as entered on the PTO Request Screen.

**Cancel:**

Cancels any data that is being entered for an employee in PTO Request Screen.

**Delete:**

Click to delete a PTO request for a selected employee.

**New:**

Click to enter new request information into BillQuick HR.

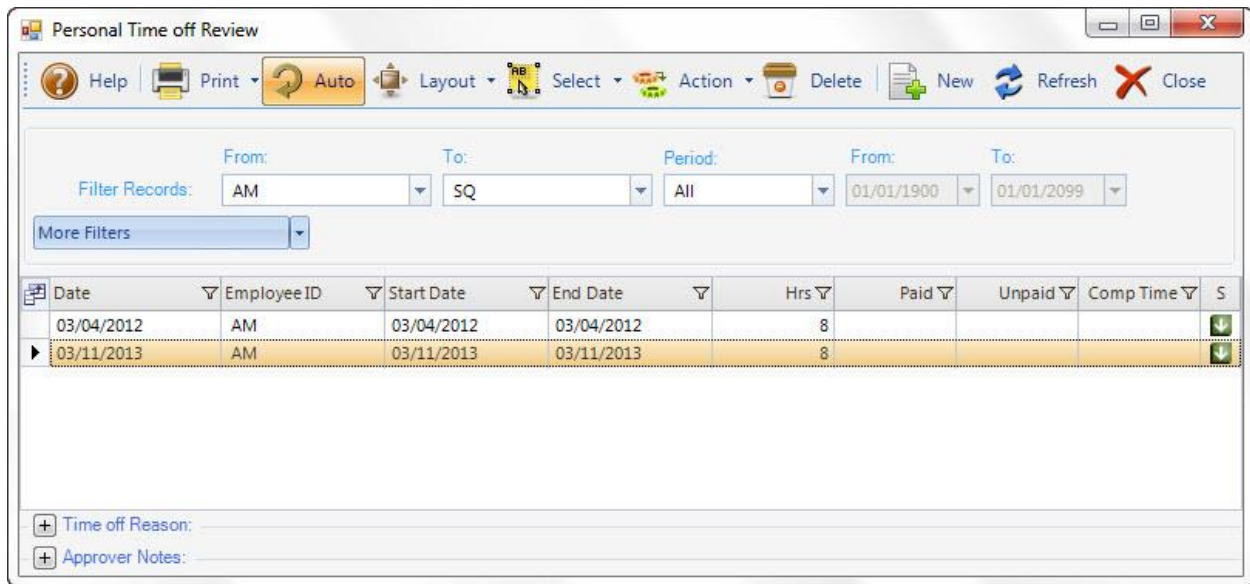
**Close:**

Click to close the PTO Request Screen. Be sure to click on Save before closing to save your changes.

**PERSONAL TIME OFF REVIEW**

---

The Personal Time Off Review screen allows the PTO approver to review personal time off requests submitted by other employees and vendors. The approver can view the employee's time off reasons, the number of hours of Personal Time Off (including, Paid, Unpaid or Comp Time) available, add a note, and decide to approve/ reject the PTO request made.



**From/To:**

These drop-down lists allow you to filter the range of employees you want to view personal time off requests for.

**Period:**

The period field provides All, This Month, Last Month, As Of Last Month, This Year to Date, Last 2 Months, Last 3 Months and Custom options. They determine the range of personal time of requests that are displayed in the grid. When the Custom option is chosen, you can choose your own range of period using the *From/To* fields.

**More Filters:**

Use this drop-down list to filter the data displayed in the grid by applying more filters. You can choose to view entries which are: Approved only, Un-approved only, Submitted only, Un-submitted only

**PTO REVIEW GRID**

---

The grid displays the following columns:

**Date:**

Shows the date when the PTO request was made.

**Employee ID:**

ID of the employee/vendor who is requesting personal time off.

**Start Date:**

The date when the personal time off period will start. The Start Date gets carried forward from the PTO Request module.

**End Date:**

The end date of the personal time off. This date is carried forward from the PTO Request form.

**Hours:**

The total of the hours that user is seeking for personal time off. Hours also, get carried forward from the PTO Request module.

**Paid (Hours):**

The number of hours specified by the employee to be considered as paid hours.




**Unpaid (Hours):**

The number of hours specified by the employee to be considered as vacation hours.


**Comp Time (Hours):**

The number of hours specified by the employee to be considered as compensation hours.

**S (Approval Status):**

This column shows the status of each request: Approved , Submitted , and Rejected 



Click the  Field Chooser to select the columns to hide or show in the grid. Check the field names you wish to show on the grid. You can also drag-n-drop fields between the Field Chooser and the grid. Whether or not fields are hidden, values are recorded to them when entries are made. By default, some of the fields are already checked and displayed in the grid. Uncheck them if you want to hide them in the grid. The column names in the field chooser are displayed in alphabetical order.

**Time Off Reason:**

Displays reasons or additional notes, if any, entered in PTO Request screen by the user seeking personal time off.

**Approver Notes:**

Enter comments in this field as needed. Type as much text as desired, or use an auto complete shorthand code to insert the standard text.



If multiple rows are selected in the grid and the approver is specifying the approval notes, BillQuick HR will save the changes in all the selected rows.

**PERSONAL TIME OFF REVIEW BUTTON PANEL**

---

The following information details the options available on the PTO Review button panel.

**Help:**

Opens the BillQuick HR Help in the Personal Time Off Review section.

**Print:**

Prompts a user to select the relevant report template. It opens the Report Filters screen to allow you to print, preview or cancel the selected report.

**Layout**

**Auto Fit:**

Lets BillQuick HR automatically adjust the grid list so all columns fit in the grid screen. Else, the grid list columns display at default widths. Regardless of the settings, you can adjust column width manually. By default, this option is on for grids.

**Best Fit:**

Lets BillQuick HR automatically adjust the grid list so that the columns fit the contents.

**Auto Refresh:**

Click to enable/disable Auto Refresh. Automatically refreshes the grid when any change is made to View By and Period options.

**Select**

**Sel All:**

Click this button to select all the time entries in the grid. Alternatively, you can use the keyboard shortcut **Ctrl +A**.

**UnSel All:**

Click this button to unselect all the entries in the grid. Alternatively, you could click in any cell within the grid to unselect the selected time entries.

**Reverse Sel:**

Click this button to reverse the selection. This un-selects the selected entries, making all other entries selected.

**Action:**

Click the button to display the various actions you can take with the PTO request selected. You can choose to:

**Approve:**

Click this button to approve one or more entries. Once approved, BillQuick notifies you with a prompt that entries have been approved successfully.

**Reject:**

Click the button to reject one or more entries.

**Delete:**

Deletes the selected PTO request.

**New:**

Click New button to create a new [personal time off request](#).

**Refresh:**

Click to update the list of PTO requests based on the selections made in the top filter fields. The grid can be set to automatically refresh with the **Auto Refresh** button on the button panel.

**Close:**

Closes the Personal Time off Review screen.

**Reports****REPORTS OVERVIEW**

---

BillQuick HR comes with a complete catalogue of pre-designed company reports. These reports are effective tools that can help you plan ahead and evaluate various HR programs. The reports compile and make use of all the data that has been entered in BillQuick HR. To produce any of BillQuick HR's reports, select Reports from the [Menu bar](#) and a comprehensive list of reports is available in the drop-down list. The reports are grouped into useful categories (e.g., employee salary, payroll, etc.). Once you choose a report, you can control what displays on the reports using report specific filters. With these filters you can customize the reports to meet your unique needs.

When previewing a report you can you make some changes to the data in your BillQuick HR database and refresh the information displayed in the report. You can also search reports for a particular word or value. Reports can be exported into the following formats:

- Crystal Reports
- PDF
- Excel
- Word
- RTF
- XML

**EMPLOYEE CONTACTS REPORTS**

---

Employee contact reports allow you to generate and view a list of all contacts for a particular employee. You can also generate a list of emergency contacts in case of emergency.

The following is a list of reports related to employee contacts:

**Employee Contact List:**

The report displays a list of contacts for the employees.

**Employee Contact (Detail):**

The report displays a comprehensive list of employee contacts.

**Employee Emergency Contact List:**

The report displays an itemization of the emergency contact numbers for the employees.

**EMPLOYEE/COMPANY BENEFITS LIST**

---

Employee Benefits reports allow you to view the benefits that your company provides to its employees, the benefits assigned to each employee, and benefit usage. These reports can serve as a guide in making better suited compensation plans for your employees.

The following is a list of reports related to employee benefits:

**Company Benefits List:**

A list itemizing the company benefits. It includes all the benefits that the company provides, the time span in which the benefit is earned, along with their status (active or inactive) is displayed here.

**Company Benefits List (Detail):**

A detailed account of the various benefits offered by the company.

**Employee Benefits List:**

A list itemizing the employee benefits. This shows which employee is entitled to which benefit and the start/end date of each benefit.

**Employee Benefit Usage:**

A detailed account of how benefits are being used by employees.

**Employee Benefit Usage As Of:**

This report helps the user to specify a date up to which you need an account of the benefits used by the employee.

**EMPLOYEE INCIDENTS REPORTS**

---

An Employee Incident Report is a document characterized by any incident related to the employee (e.g. accident, injury, arrest, etc.). If an employee is injured or has an accident while on job the manager/supervisor must complete and submit the *Employee Incident Report*.

The Employee Incidents reports include:

**Employee Incidents (Detail):**

This report is submitted by the manager, co-worker or employee himself in case of any incident related to the employee. It provides a detailed description of the incident. This report lists all the information such as the incident type, location, time, date, reported by, reported date, external or otherwise associated to the incident.



**Employee Incidents by Status:**

The Employee Incidents by Status Report provides a summary of the incidents based on their status. It contains lesser information than the detailed one but the incidents can be viewed according to their status.

**Employee Incidents by Type:**

The Employee Incidents by Type Report provides a summary of the incidents based on their category/type. It contains lesser information than the detailed one.

**EMPLOYEE JOURNAL REPORT**

---

An Employee Journal report is a document which maintains a standard list of employee related items such as degrees, achievements and warnings. Journal entries are intended to assist the supervisors in monitoring the code and conduct of employees and to track achievements in their respective fields of expertise.

The Employee Journal report includes:

**Journal Entry Types List:**

The Journal Entry Types List is a report which contains a list of the journal entries and their status, whether active or inactive.

**Employee Journal (Detail):**

This report is a detailed account of the various Journal entries made in favor of various employees. It includes a description of who recorded the entry, when it was reported and recorded, and its status.

**Employee Journal Details (With Notes):**

This is a detailed account of the various Journal entries made in favor of various employees along with a description of who recorded the entry, when it was reported and recorded, and its status. In addition to the above details it also includes notes related to various journal entries.

**EMPLOYEE SALARY REPORTS**

---

The Employee Salary History Report is a document that maintains a history of the salary rate per employee. It also provides a foundation for the assessment of the salaries of various employees.

The Employee Salary History Reports include the following:

**Employee Salary History (Monthly):**

This report contains a detailed account of the salary history of all the employees on a monthly basis. It includes information such as the Employee ID, Name, Salary Review Date, Commission, Bonus, and Salary per Month, etc.

**Employee Salary History (Yearly):**

This report contains a detailed account of the salary history of all the employees on a yearly basis. It includes information such as the Employee ID, Name, Salary Review Date, Commission, Bonus, and Salary per Year etc.

### **Employee Salary History (Monthly) By Dept.:**

This report provides a detailed department wise account of the salary history of all the employees. It includes a department wise account about the Employee, his designation and his Salary per Month. In the tree like structure to the left of your screen, you can click on any department name to view the report for that department.

### **Employee Salary History (Yearly) By Dept.:**

This report provides a detailed department wise account of the salary history of all the employees. It includes a department wise account about the Employee, his designation and his Salary per Year. In the tree like structure to the left of your screen, you can click on any department name to view the report for that department.

## **GRAPHS**

---

A graph is a symbolic illustration which shows how information or variable amounts are related, usually by lines or curves. It is generally used for the Employee Review Comparison. The review is based on the standards set by the organization itself. For some organizations the employee review standards may be experience, seniority, time spent in the organization, etc. Other organizations may include the attendance, entrepreneurship, strength, dependability, etc. The review standards are organization specific.

The following provides information on the included graphs:

### **Employee Review Comparison by Dept.:**

This graph provides a figurative image of Employee Reviews by department. Here the review of a single department on the basis of various standards is depicted in the form of a graph. A graphical representation instills interest into the intellect of the user.

### **Employee Review Comparison by Title:**

This Graph provides a figurative image of Employee Reviews by Title/Designation. Here the review of a single title (e.g. Administrative Assistant) is depicted in a graphical format. This review again is performed on the basis of the already set standards.

### **Employee Review Comparison by Type:**

This graph provides a pictorial figure of the Employee Review based on some category or type. For example, a review may be performed based on the salary alone or on the performance alone or even on a general basis taking into account general issues. This review is depicted in the mentioned graph.

## **How Do I**

### **HOW DO I ACTIVATE BILLQUICK HR?**

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On installing BillQuick HR, you are prompted with the [Product Activation](#) screen. On startup, you can select either **Activate Now** or **Activate Later** option. Activating the product later starts a 7-day free trial, during which the product can be activated. As soon as the trial period is over, the user can purchase the free evaluation key via email/phone/[internet](#).

If BillQuick HR is activated but not yet purchased, the program will run for a further 30-day trial period. As soon as the evaluation period expires, BillQuick HR locks its program.

After 30 days, your company file must be licensed and BillQuick HR must be registered for further use. The license/registration key can be purchased via email/internet. For more information, call (310) 602-4020 or visit [www.bqe.com](http://www.bqe.com).

## HOW DO I CREATE NEW COMPANY DATABASE?

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Do the following to create a new company database:

1. Select File menu>New Company>Standard Database.
2. Enter a filename for the company data file and click Open.
3. The [BillQuick HR Startup Interview](#) wizard displays. Click Next.
4. Enter a company name and click Next.
5. Enter your license and registration keys and click Next.
6. Select options for importing data from BillQuick and click Next.
7. Click Finish.
8. If you selected to import data from BillQuick, the [Import From BillQuick](#) screen displays. Select your import options and click Get from the button panel.
9. After the import, the [Company Information](#) screen displays. Enter firm details and click Save.



For detailed procedures, check out the [BillQuick HR Getting Started Guide](#).

## HOW DO I SET UP BILLQUICK HR USERS?

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When BillQuick HR security is turned on, only the [Supervisor](#) and employees that are designated as [BillQuick HR Users](#) can log in to the system. Do the following to flag selected employees as BillQuick HR Users.

1. Select Employee menu>Master Info.;
2. Do one of the following:
  - Existing Employee: For an existing employee, select the employee from the *Employee list* grid and go to Step 3.
  - New Employee: Click New on the [Employee](#) button panel and enter the required employee information.
3. On the *General* tab, select the BillQuick HR User check-box.
4. Click Save.



The number of users that can access BillQuick HR is limited to the number of licenses purchased by your company. BillQuick HR will not allow the number of employees flagged as [BillQuick HR Users](#) to exceed the number of user licenses.

## HOW DO I USE JOURNALS?

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### Creating Journal Entry Types

1. Select Company, Journal Type List.
2. Click New on the button panel.
3. Enter a descriptive Journal entry name in the *Entry Type* field.
4. Click Save.
5. Repeat steps 2-4 to add additional entries.



Select the checkbox adjacent to a journal entry to make it inactive. Inactive entries are not available for use in other modules.

Once you have familiarized yourself with the journal entry types, the status of the journal needs to be clarified. The user can fill Journal Status form before hand but we suggest filling it after creating the journal entry types.

### Indicating the Journal Status

1. Choose Journal Status List from the Company menu drop-down list to display the Journal Status screen.
2. Click New on the button panel.
3. Enter descriptive detail in the *Status Name* field (e.g., open, closed, pending, etc.).
4. Mark the given check box if you want the journal status to be inactive.



Select the checkbox adjacent to a journal status to make it inactive. Inactive entries are not available for use in other modules.

Our next step is proceeding to the Journal module where we will be using the information entered in the previous steps.

## CREATING A JOURNAL

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1. Select Employee > Journal.
2. Click New on the button panel.
3. Make a selection from the *Journal Type* drop-down list.
4. Enter the date on which the journal is created from the *Record Date* field.
5. Select the ID of the employee recording the journal from the *Reported By* drop-down list.
6. Enter the ID of the concerned employee recording this journal in the *Recorded By*.
7. Select the journal status from the *Journal Status* drop-down.



Click the [Attachments](#) link to attach detailed notes or files to a journal entry.

8. Click Save.

## Reports on Journals

To be able to view at a glance the information on the journals that are offered by your company and on its usage, you can generate [Reports](#) any time. This helps you review company policies and make data driven decisions on administering employee compensation.

## HOW DO I USE BENEFITS?

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### Creating a Benefit List

1. Select Company, Benefit List.
2. Click New on the button panel.
3. Make a selection from the *Benefits Period Units* drop-down list. For example, for sick time, the benefit would be measured in days so you would select days from this field.
4. Enter the time span in which the benefit would be earned.
5. Select the benefit status and keep it active.
6. Click Save.
7. BillQuick HR comes with two default benefits (vacation and sick). On the grid on your left, choose Sick and the data corresponding to it will be displayed on the screen.
8. To change an existing entry, select it from the grid, make the changes in the screen, and click save on the standard toolbar.
9. In the fields below, enter values to regulate your sick time benefit. For example if an employee earns no sick time in first six months the benefit is assigned to the employee, enter: *Employee earns 0 days after working 6 months*.
10. You may want to specify how over time the amount of benefit earned would differ: e.g. *Employee earns 5 days after working 12 months*. Fill out the details for the rest of the screen.



You can always create new, delete old and edit the existing benefits by accessing this screen.

Once you have a list of the benefits your company offers its time to assign these benefits to the employees.

### Assigning Benefits

1. Select Employee, Assign Benefits.
2. In the Employee ID field, select the employee that you wish to assign benefit to.
3. In the grid below, from the Benefit name drop-down list, choose the benefit that you wish to assign to this employee (e.g. vacation).
4. Enter Start Date for this benefit. This is the date the employee would start earning the benefit.



The employee does not start earning the benefit from the day he/she joins the company, but from the start date given here. If you would like the benefit to start the same date as the employee was hired, choose the date he/she was hired as the start date.

5. Enter End Date for this benefit. This is the date on which the employee would no longer be eligible for earning benefits. You can leave this field blank if you do not wish to have an end date on benefits earning period.



The benefits earning is measured on accrual basis. Hence if for 1 year an employee earns 6 days leave and the benefit period ends before his 1 year is complete, say 6 months, the employee would earn 3 days of leave.

6. To assign more benefits for this employee, go to the next row, and add information on the next benefit. Use the Tab key to navigate from field to field on the grid. Moving to the next row will automatically save the data in the previous row.
7. To assign benefits for other employees, repeat the above steps.



You can always assign new, delete old and edit the existing benefits assigned to the employees from this screen.

### **Monitoring Usage of Benefits by Employees**

Once an employee has been assigned benefits, the management would want to keep track of the usage of these benefits in terms of how much of the benefit earned was used and how much is left. To check an employee's benefit usage:

1. Select Employee, Benefit Usage.
2. On the left side of the screen is the grid displaying names of employees. Select the employee that you wish to view information for.
3. The screen displays a grid at the bottom of the screen displaying the benefits that have been used by the employee. Click on any of the used benefits to view the details of the information on the screen.
4. At the bottom of the screen is displayed the total available Benefit hours used and available. If the sick and vacation hours used; are more than what were assigned to that employee, the value is displayed in **red** color.

### **REPORTS ON BENEFITS**

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To be able to view at a glance the information on the benefits that are offered by your company and on its usage, you can generate [Reports](#) any time. This helps you review company policies and make data driven decisions on administering employee compensation.

### **HOW DO I MANAGE REVIEWS?**

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#### **Creating a Review List**

1. Select Company, Master Review Form or press Ctrl+2.
2. Click New on the button panel.
3. Enter the attribute name in the review Section Name field. This helps in identifying what type of appraisal is scheduled.
4. Type in any additional information about the review type in the Description field.
5. Click Save.



You can always create new, delete old and edit the existing entries by accessing this screen. The saved information gets displayed in the summary grid and the user can access any desired entry from here.

### Creating an Employee Review

1. Select Employee,Reviews.
2. Make a selection from the Reviewer ID drop-down list to identify the person conducting the review.
3. Select the type of review from the Review Type drop-down list (e.g., salary, performance, etc.).
4. Enter or select the date on which the review is conducted from the Date field.
5. Enter the date on which the employee will be reviewed next time in the Next Review field.
6. Specify the review location in the Location field.
7. Click Save.



Any additional information about the review can be added in the grid below.

You can always create new, delete old and edit the existing entries by accessing this screen. The saved information is displayed in the summary grid and the user can access any desired entry from here.





## OTHER

### IMPORT FROM BILLQUICK

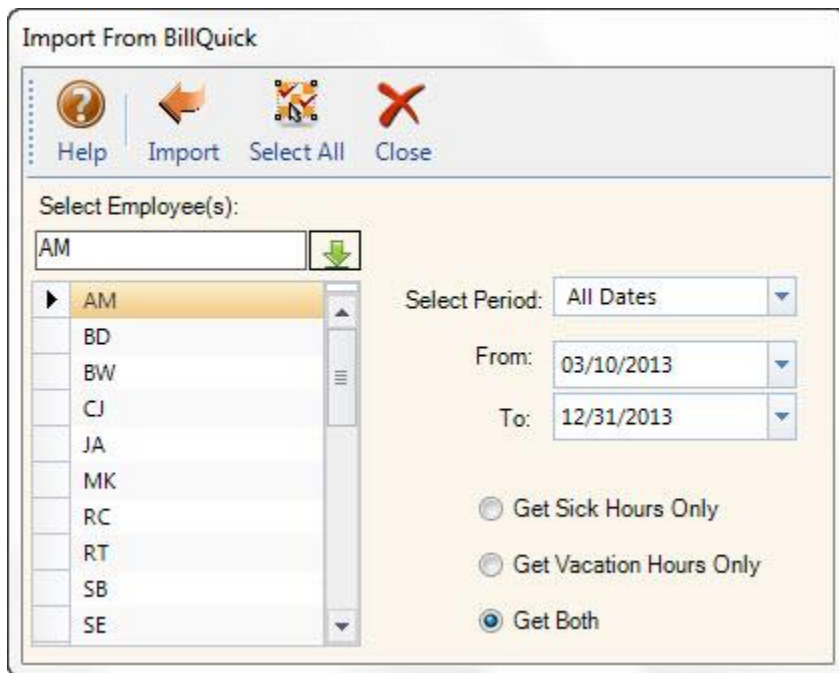
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#### *Navigation Employee, Benefit Usage*

The Import From BillQuick feature provides an easy way to transfer vacation and sick hours from BillQuick to BillQuick HR. Through this screen, you can eliminate data entry errors and time spent manually reentering data. You can quickly import your data and begin focusing on your human resource management tasks.

The Import feature gives you control over what data is imported. You can import data for all or selected employees. It also provides filters so you can control the information that gets transferred into BillQuick HR. The time entries can only include approved vacation or sick hours.

During the initial set up of BillQuick HR, this screen displays if you elect to import data from BillQuick.



#### **Select Employee(s):**

Select one or more employees to import information from BillQuick to BillQuick HR. To select nonadjacent employees, press the **CTRL** key while clicking on employee names.

#### **Filters**

##### **Select Period:**

Select a date range for which reported vacation and sick hour time entries will be imported for selected employees. You can import entries made on the current date, this week to date, this month to date, this quarter to date, this year to date, etc.

**From/To:**

These fields will limit the vacation and sick hours imported to those that fall within the date range specified. When the From and To fields are empty, BillQuick brings up all the records in the grid.

**Get Sick Hours Only:**

Choose to only transfer sick hours for the selected employee(s).

**Get Vacation Hours Only:**

Choose to only transfer vacation hours for the selected employee(s).

**Get Both:**

Choose to only transfer both vacation and sick hours for the selected employee(s).

**Import From BillQuick Button Panel**

The following information details the options available on the button panel.

**Help:**

Opens BillQuick HR Help in the Import From BillQuick section.

**Import:**

Click this button to import data from BillQuick.

**Select All**

Click to highlight all listed employees for data transfer.

**Close:**

Closes the Import From BillQuick screen.

**DATA INTEGRATION WITH BILLQUICK**

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BillQuick HR has a feature that offers a seamless data integration with BillQuick. The purpose is to have a single integrated application that can manage human resources and related processes. The integration with BillQuick allows you to transfer data from BillQuick to BillQuick HR. This feature makes your resource management tasks easier. Critical data can be shared between BillQuick and BillQuick HR without having to enter it twice.

The built-in import feature allows you to import data from BillQuick regularly. You can import BillQuick employees, their sick hours and vacation hours to BillQuick HR using the appropriate options.

Below are table-to-table and field-to-field mapping between BillQuick and BillQuick HR. The dataflow is unidirectional (i.e., transfers data from BillQuick to BillQuick HR). These tables will help you understand what data transfers between the two databases.

<b>BillQuick Table Name</b>	<b>Dataflow</b>	<b>BillQuick HR Table Name</b>
Employee	-->	Employee
Employee	-->	Employee Payroll
Employee	-->	Employee Contacts

### Field Mapping

<b>BillQuick Employee</b>	<b>Dataflow</b>	<b>BillQuick HR Employee</b>
Employee ID	-->	Employee ID
Employee MI	-->	Employee MI
Employee Last Name	-->	Employee Last Name
Employee Salutation	-->	Employee Salutation
Company	-->	Company
Street	-->	Street
Street 2	-->	Street 2
City	-->	City
State	-->	State
Zip	-->	Zip
Country	-->	Country
SSN	-->	SSN
Title	-->	Title
Contact Phone	-->	Contact Phone
Home Phone	-->	Home Phone
Fax#	-->	Fax#
Email	-->	Email
Web	-->	URL

Bill Rate	-->	Bill Rate
Cost Rate	-->	Cost Rate
OT Bill Rate	-->	OT
OT Pay Rate	-->	OT
Department	-->	Department
Hired	-->	Hired
Released	-->	Released
Manager	-->	Manager
Memo	-->	Memo

<b>Employee</b>	<b>Dataflow</b>	<b>Employee Payroll</b>
Employee ID	-->	Employee ID
Salary Amount	-->	Salary Amount
Pay Period	-->	Pay Period
Federal Status	-->	Federal Status
Federal Allowances	-->	Federal Allowances
Federal Extra Withhold	-->	Federal Extra Withhold
State Status	-->	State Status
State Withholding	-->	State Withholding
State UnEmp	-->	State UnEmp
State W2ID	-->	State W2ID
Pay Items State Withhold	-->	Pay Items State Withhold
Pay Items State Unemp Ins	-->	Pay Items State Unemp Ins
State Allowances	-->	State Allowances
State Extra Withhold	-->	State Extra Withhold
Pay Items State Misc	-->	Pay Items State Misc

Local Status	-->	Local Status
Local Allowances	-->	Local Allowances
Local W2ID	-->	Local W2ID
Federal Inc Tax	-->	Federal Inc Tax
Federal Soc Sec	-->	Federal Soc Sec
Federal Medicare	-->	Federal Medicare
Federal FUTA	-->	Federal FUTA
Federal Pension	-->	Federal Pension
Federal Deferred	-->	Federal Deferred
Last Raise	-->	Last Raise
State Disability	-->	State Disability
Pay Items State Dis Ins	-->	Pay Items State Dis Ins