ADP Workforce Now

Using the Payroll Dashboard

Handout Manual

Need support after training?
To exchange tips and best practices with fellow users, get on [The Bridge/ADPworks]—an online community built exclusively for ADP [clients/associates].

V09171981001WFN21
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Course Introduction

Welcome

Welcome to Using the Payroll Dashboard for ADP Workforce Now. This training includes U.S. spellings and the date construct of month/day/year. You will see your expected spellings and date constructs in your solution back on the job.

Navigating WebEx
Course Purpose

This course prepares you to use the Payroll Dashboard in ADP Workforce Now to perform your payroll tasks.

Implementation Questions

List any follow-up items that you may need to discuss with your implementation consultant (IC) or implementation specialist (IS):

•
•
•
•
•
Introduction to the Payroll Dashboard

The Payroll Process

Overview

Each pay period, you perform certain tasks to ensure that your company's employees are paid. ADP Workforce Now guides you through these tasks.

Stages and Descriptions

The following table describes the stages of the payroll process in ADP Workforce Now.

<table>
<thead>
<tr>
<th>Stage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starting the payroll cycle</td>
<td>You begin the payroll process by starting a new cycle. You clear the temporary information that was entered for the previous pay period, move your Essential Time &amp; Attendance data into history, and advance the date of the next pay period.</td>
</tr>
</tbody>
</table>
| Entering payroll information | You enter several types of temporary data to your payroll:  
  - Enter employees' pay information that applies only to the current pay period, such as hours worked, one-time deductions, and so on.  
  - Add the Time & Attendance data that you have collected on your employee's timecards, if applicable.  
  - Add the approved Time Off data for the current pay period, if applicable.  
  This is also when you enter permanent data such as new hire information and changes to permanent employee information, such as the following:  
    - Address  
    - Tax  
    - Deductions  
    - Pay rate                                                                                                                                 |
| Verifying information       | You can view your data in real time, at any time, as you enter it, using the Payroll Dashboard. Standard reports also allow you to verify input.       |
| Previewing your payroll      | You submit your payroll information to ADP. ADP calculates a preview of your payroll, which you review and, if necessary, enter any corrections. Once you make the changes, you submit your updated payroll information to be processed again and you repeat the preview process. |
| Accepting your payroll       | Once your preview payroll is accurate, you accept the payroll. ADP produces your paychecks, direct deposit vouchers, and payroll and management reports.  
  The reports that ADP generates after you process your payroll are called output reports. You can view your output reports online through ADP's Payroll and Quarterly Tax Reports, accessed from the Reports menu. |
What Is the Payroll Dashboard?

The Payroll Dashboard is a central location where you perform all of the payroll processing tasks that are relevant to where you are in the payroll process. It enables you to see all of your critical payroll processing information at a glance on one page. The links and tiles that are available on the Payroll Dashboard are based on the features that your company uses. For instance, your Payroll Dashboard may include links and tiles for Essential Time & Attendance or Time Off tasks that are related to your payroll processing. You can quickly see if something requires you to take action before submitting your payroll.

Example 1

You completed your payroll yesterday, and you received all of your pay statements and reports today. You use the Payroll Dashboard to easily verify the new cycle pay date and period end date before clicking the Start New Cycle button to start the new payroll cycle.

Example 2

Two new employees have started with your company this pay period. However, the Payroll Dashboard indicates that only one new employee has been entered in ADP Workforce Now. You use the Payroll Dashboard to identify which new employee was entered. You can then enter the necessary information for the other new employee.

Example 3

You have entered your paydata for this pay period. When you review the Payroll Dashboard, you see that six active employees do not have any hours or earnings information entered for this pay period—meaning that they will not be paid. You use the Payroll Dashboard to identify the employees and then enter the necessary information in your paydata batch to ensure that they will receive their pay.
Explore: The Payroll Dashboard
Starting Point: Process > Payroll > Payroll Cycle

U.S. Company Code
Canadian Company Code
## Sections and Descriptions

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company ID bar</td>
<td>Indicates the company name and code for which you are viewing information, the payroll status of that company code, and the pay period information for that company code. <strong>Note:</strong> The date format for the pay period information is dependent on your user preferences.</td>
</tr>
<tr>
<td>Cycle Status</td>
<td>Indicates where you are in the payroll process for this company code and what the next step of the process will be.</td>
</tr>
<tr>
<td>Employee Updates</td>
<td>Lists the number of new hires and terminated employees for this company code for this pay period and gives you quick access to all the employee changes entered for this company code for this pay period.</td>
</tr>
<tr>
<td>Payroll Inputs</td>
<td>Provides an at-a-glance view of all batches entered for this company code for this pay period and a summary of the total number of hours and earnings entered in those batches. This area includes information for Essential Time &amp; Attendance or Time Off batches, if your company uses those features.</td>
</tr>
<tr>
<td>Input Summary</td>
<td>Provides a quick glimpse of data that you use to verify payroll information, such as the number of active employees without pay entries for this pay period or the number of QuickCalc requests or manual checks entered for this pay period.</td>
</tr>
<tr>
<td>Warnings &amp; Messages</td>
<td>Identifies items requiring your attention, such as the following:</td>
</tr>
<tr>
<td></td>
<td>• Paydata batches that are out of balance</td>
</tr>
<tr>
<td></td>
<td>• Year-to-date files that must be loaded</td>
</tr>
<tr>
<td></td>
<td>• Warnings or errors that occur as a result of processing the payroll</td>
</tr>
<tr>
<td></td>
<td>• Essential Time &amp; Attendance timecard errors (if your company uses this feature)</td>
</tr>
<tr>
<td></td>
<td>• Pending Time Off requests for the current pay period (if your company uses this feature)</td>
</tr>
</tbody>
</table>

### Best Practice

If your company uses more than one company code, always ensure that you are viewing the Payroll Dashboard for the correct company code.

### Additional Resource

For more information about performing payroll tasks, access the learning byte menu by clicking (learning byte) and select the learning byte that best describes your features.
Review: The Payroll Dashboard

1. According to this image, in what step of the payroll process is this company code?
   a. Entering Payroll Information
   b. Under Review
   c. Cycle Complete

2. According to this image, what is the next step of the payroll process?
   a. Starting the payroll cycle
   b. Entering payroll information
   c. Verifying information
   d. Previewing your payroll
   e. Accepting your payroll

3. According to this image, how many regular hours were entered in paydata batches for this company code's employees for this pay period?
   a. 2.50 hours
   b. 8.00 hours
   c. 295.00 hours
   d. 305.50 hours
Review: The Payroll Dashboard (cont.)

4. According to this image, how many new employees have been entered for this company code for this pay period?

   a. 0  
   b. 1  
   c. 2  
   d. 6
Review: The Payroll Dashboard (cont.)

5. According to this image, how many manual checks have been entered for this pay period for this company?

- a. 0
- b. 1
- c. 3
- d. 6
Review: The Payroll Dashboard (cont.)

6. According to this image, where would you determine how many employees have
timecard errors? Answer only if your company uses Essential Time & Attendance.

- a. On the Add Time/Time Off Batch tile
- b. In the Warnings & Messages panel
- c. On the Total Hours tile

7. According to this image, how many time off requests are pending? Answer only if your
company uses the Time Off feature.

- a. 0
- b. 1
- c. 2
- d. 8

Additional Resources

- For information about using the Payroll Dashboard to resolve timecard errors,
  complete the course Essential Time & Attendance for ADP Workforce Now.
- For information about using the Payroll Dashboard to resolve pending time off
  requests, complete the course Using Time Off for ADP Workforce Now.
- You can also review the available learning bytes by clicking  (learning bytes) on the
  Payroll Dashboard or by accessing  (support).
Workshop: Becoming Familiar with the Payroll Dashboard

Instructions

Access the Payroll Dashboard for one of the following company codes, and answer the questions for the following three learning activities.

<table>
<thead>
<tr>
<th>If you work with</th>
<th>Then select the company code</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. employees only</td>
<td>Geneva Video Games</td>
</tr>
<tr>
<td>Canadian employees only</td>
<td>Go Green 101</td>
</tr>
<tr>
<td>Both U.S. and Canadian employees</td>
<td>Either of the following company codes:</td>
</tr>
<tr>
<td></td>
<td>• Geneva Video Games (which includes U.S. employees)</td>
</tr>
<tr>
<td></td>
<td>• Go Green 101 (which includes Canadian employees)</td>
</tr>
</tbody>
</table>

Tip: To access the Payroll Dashboard, select Process > Payroll > Payroll Cycle. Then, select the appropriate company code.
Learning Activity: Exploring the Employee Updates Section

Overview
The Employee Updates section is where you enter, view, and track permanent employee information for the current pay period. For example, you can perform the following tasks:

- Enter or view a new hire.
- Initiate a termination.
- Enter wage increases or address changes.
- View the changes.

Questions
Access the Payroll Dashboard for the appropriate company code, and answer the following questions.

1. What would you click to add a new employee?

2. How many employees were terminated this pay period for this company code?

3. How would you quickly view the employee changes that were entered for this pay period for this company code? What are some of the changes that have been entered so far?

4. What learning bytes are available to demonstrate how to add a deduction or direct deposit for employees?

Important Information
The Employee Changes view, accessed from the Changes tile, lists the changes that were made to an employee’s record. To determine who made the change and the date and time that the change was entered, you can run the Audit Trail standard report from the Reports menu.

Additional Resources
- For information about adding new employees, terminating employees, or entering employee changes, complete the *Maintaining Employee Information in ADP Workforce Now* course. You can also refer to various learning bytes available within ADP Workforce Now and by accessing (support).
- For more information about running standard reports, refer to online Help.
Learning Activity: Exploring the Payroll Inputs Section

Overview

The Payroll Inputs section shows the paydata batches that have been entered. A paydata batch is a group of employees to be paid that you organize in some logical way. For instance, you may create paydata batches for all of the employees in each of the following groups:

- The employees in a particular location or department
- Hourly employees
- Salaried employees who are taking time off this pay period

You total the pay entries for each group of employees. After you complete a paydata batch, you can use the totals that you calculate to compare your information with the system totals and verify that your entries are correct.

Questions

Access the Payroll Dashboard for the selected company code, and answer the following questions.

1. How many paydata batches have been entered so far for this pay period?

2. How many hours have been entered in all the batches?

3. What earnings amount has been entered in the batches?

4. What displays when you click the Total Hours tile?

5. How would you add another paydata batch for this pay period?

Important Information

The Total Hours and Total Earnings tiles include only the information that was entered in paydata batches. Employees that were paid a standard number of hours and salaried employees that were automatically paid their standard salary are not included in the calculations.

Additional Resources

For information about adding or working with paydata batches, complete some or all of the following courses, based on your company's setup, as well as various learning bytes available within ADP Workforce Now and by accessing (support):

- Entering Paydata in ADP Workforce Now
- Essential Time & Attendance for ADP Workforce Now
- Using Time Off for ADP Workforce Now
Learning Activity: Exploring the Input Summary Section

Overview

ADP Workforce Now uses the Automatic Pay feature to pay your salaried employees automatically every pay period. You do not need to do anything for these employees unless you have changes to their pay information such as entering sick or vacation hours or paying a bonus.

If you have hourly employees who work a standard number of hours every pay period, you can set them up accordingly. Hourly employees with standard hours are also paid automatically every pay period.

All other employees would need to have hours or earnings entered into a paydata batch in order to be paid.

Canceling an employee's Automatic Pay means that that employee will not receive pay for the given pay period unless hours or earnings are entered for the employee in a paydata batch.

Questions

Access the Payroll Dashboard for the appropriate company code, and answer the following questions.

1. How many employees do not have any hours or earnings entered into a paydata batch? How can you access the report for a list of affected employees’ names?

2. How many employees will have their Automatic Pay canceled this pay period? Who are they?

Additional Resources

- For more information about Automatic Pay, complete the Entering Paydata in ADP Workforce Now course. You can also refer to the Using Automatic Pay learning byte and the Canceling Automatic Pay learning byte, both available within ADP Workforce Now and by accessing (support).

- For information about QuickCalc and manual checks, complete the Creating Manual Checks in ADP Workforce Now course.
Explore: The Payroll Dashboard in Under Review Status

When you click Preview Payroll in the Cycle Status section, the information that you have entered is sent to ADP for processing. The Payroll Dashboard is updated to reflect the processed information for you to preview before finalizing your payroll for this pay period.

U.S. Company Code
Canadian Company Code
## Elements and Descriptions

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statistical Summary Totals section</td>
<td>Shows you, at a glance, the gross pay and your company's liability for this company code's payroll for this pay period.</td>
</tr>
<tr>
<td>Compare Historical Data toggle</td>
<td>Enables you to compare this pay period's information with a prior pay period.</td>
</tr>
<tr>
<td>View Full Statistical Summary button</td>
<td>Displays a Statistical Summary view in a tabular or spreadsheet format, with information organized into tabs.</td>
</tr>
<tr>
<td>View Trends button</td>
<td>Displays a chart of gross pay trends for the last year of payrolls that were processed with ADP Workforce Now. You can export the chart to a PDF or an Excel file and give it to your controller or manager for trends analysis.</td>
</tr>
<tr>
<td>Statistical Summary Details section</td>
<td>Shows statistical summary details that are represented by colorful donut charts. The information in these charts is the same as the information available on the tabs of the Full Statistical Summary view.</td>
</tr>
<tr>
<td>Register Details section</td>
<td>Provides other views that are useful in verifying payroll information before you accept the payroll for this pay period.</td>
</tr>
<tr>
<td>Download Reports section</td>
<td>Provides additional payroll reports available for download.</td>
</tr>
<tr>
<td>Warnings &amp; Messages section</td>
<td>Identifies items that require your attention, such as the following:</td>
</tr>
<tr>
<td></td>
<td>• Paydata batches that are out of balance</td>
</tr>
<tr>
<td></td>
<td>• Employees with timecard errors</td>
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<td>• Pending time off requests</td>
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<td></td>
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</tr>
<tr>
<td></td>
<td>• Warnings or errors as a result of processing the payroll</td>
</tr>
</tbody>
</table>

## Additional Resources

For more information about previewing the calculated payroll on the Payroll Dashboard, complete the *Calculating Your Preview Payroll and Previewing Payroll Results in ADP Workforce Now* course.
Course Closing

The Bridge

Bridge is an online community for payroll and HR professionals where you can ask questions, share knowledge, make connections, and learn from industry experts and peers about a broad range of human capital management topics. You can access TheBridge.adp.com (United States) or TheBridge.adp.ca (Canada) to do the following and more:

- Learn how other professionals are getting more from their ADP solutions with time-saving resources and helpful features.
- Join community spaces or topics of interest, including tax, payroll, HR and benefits, and time and labor management.
- Connect with other payroll practitioners, HR professionals, featured industry representatives, and ADP subject matter experts.
- Share your experiences.
- Check the Frequently Asked Questions or ask the community.

How to Access The Bridge Job Aid

Instructions

If you are logged on to ADP Workforce Now, at the top of any page, click (The Bridge). If you are not logged on, complete the following instructions.

<table>
<thead>
<tr>
<th>If You Are A</th>
<th>Then</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2. Log on using your ADP Workforce Now user name and password.</td>
</tr>
<tr>
<td></td>
<td>3. Select Products &gt; ADP Workforce Now.</td>
</tr>
<tr>
<td>Canadian practitioner</td>
<td>1. Access thebridge.adp.ca.</td>
</tr>
<tr>
<td></td>
<td>2. Log on using your ADP Workforce Now user name and password.</td>
</tr>
<tr>
<td></td>
<td>3. Select Products &gt; Workforce Now.</td>
</tr>
</tbody>
</table>
How to Access Support Job Aid

ADP provides various resources to help you perform your tasks after class.

Instructions

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>At the top of any page, click 📋 (support).</td>
</tr>
<tr>
<td>2</td>
<td>In the Search field, enter a topic and then click 🔍 (search). &lt;br&gt; <strong>Result:</strong> The available online Help and training are displayed.</td>
</tr>
<tr>
<td>3</td>
<td>Review the available resources. &lt;br&gt;United States practitioners:</td>
</tr>
<tr>
<td></td>
<td>If You Want To</td>
</tr>
<tr>
<td></td>
<td>Read online Help</td>
</tr>
<tr>
<td></td>
<td>Access a learning byte</td>
</tr>
<tr>
<td></td>
<td>Canadian practitioners:</td>
</tr>
<tr>
<td></td>
<td>If You Want To</td>
</tr>
<tr>
<td></td>
<td>Read documentation</td>
</tr>
<tr>
<td></td>
<td>View step-by-step instructions</td>
</tr>
<tr>
<td></td>
<td>View learning bytes</td>
</tr>
<tr>
<td>4</td>
<td>To close the Support page, click Back.</td>
</tr>
</tbody>
</table>

Additional Training

To learn more about the other tasks of the payroll process, complete the following training:

<table>
<thead>
<tr>
<th>Resource</th>
<th>Training Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entering Paydata in ADP Workforce Now</td>
<td>Instructor-led course</td>
</tr>
<tr>
<td>Essential Time &amp; Attendance for ADP Workforce Now</td>
<td>Instructor-led course</td>
</tr>
<tr>
<td>Using Time Off in ADP Workforce Now</td>
<td>Instructor-led course</td>
</tr>
<tr>
<td>Verifying Input in ADP Workforce Now</td>
<td>Learning byte in ADP Workforce Now</td>
</tr>
<tr>
<td>Calculating Your Preview Payroll and Previewing Payroll Results in ADP Workforce Now</td>
<td>Web-based training</td>
</tr>
<tr>
<td>Practicing Payroll Tasks in ADP Workforce Now</td>
<td>Interactive game</td>
</tr>
<tr>
<td>Using Payroll-Related Reports for ADP Workforce Now</td>
<td>Instructor-led course</td>
</tr>
</tbody>
</table>
Training Evaluation

Please take a moment to complete the evaluation.