

This HelpNote describes the facilities offered in SmoothPay to suit the requirements of companies involved in providing security services generally and for Red Badge Group specifically.

Note that the Bulk Editing of employees, and the RedBadge tab in Employee Setup..More is only available to specific sites. The export and import facilities described are available to all users, in this and other formats as well.

## Creating Excel Timesheet Export File from SmoothPay

*(and emailing the file to a recipient)*

Create an Excel timesheet export file using the Wizards..Make timesheet file, and the options indicated above (the output destination is not so important, but make sure the recipient's email address and the "Red Badge" option is selected).



Choose Make file:



You'll be prompted for a department (or choose all departments for a comprehensive file), then choose OK.

The magic happens, and an Excel output file is generated (this goes through a new report named xlsrb, then via the new XLS exporter to create a file called xlsrnb.xls which is what will actually be emailed to the recipient, though it is copied over the specified export file name when the process is completed – it's just how it is and is not that important).

If you choose not to email the file you can easily send the TIME.XLS file from the output folder afterwards if you wish – remember though it gets overwritten each time you run the utility. This makes it convenient for checking before sending etc.

## Email Setup

If you've not configured SmoothPay's email system to use SMTP then you'll be prompted whenever an attempt is made to place an email in your outbox (the Excel file email). I'd suggest setting your system up as follows (if it doesn't work out, call or revert to the current method). You may need technical assistance, but it's pretty straight forward really. In Company Setup..Email Setup..Configure, set as follows (with appropriate changes to email addresses and smtp server name):

Email messaging configuration

Methods used for sending emails

Backup, restore and feedback data SMTP (recommended)

Error messages and logs SMTP (recommended)

Reports and other documents SMTP (recommended)

Sender's email address andy@redbadge.co.nz

SMTP settings (required only if SMTP options selected above)

BCC all SMTP emails to michele@redbadge.co.nz

SMTP server name smtp.xtra.co.nz

Requires logon to pop server before sending (rarely required)

POP server name pop3.xtra.co.nz

Logon user name username

Logon password ccccccccc

Save

Test smtp

Test client

## Bulk editing employee records

This utility is provided to enable the quick setup of existing staff, or to accommodate bulk changes.

Choose Wizards..ToolBox..Bulk Employee Edit Grid (it'll probably make you do a backup because the tool permits mass changes to employee data, and if it gets stuffed up you can then restore easily and try again):

Employee bulk edit (use with CAUTION! - updating live records)

ID	Name	First name	Rating	Gender	Role	Training	Warden	Home phone	Phone 2	Cell phone	Suburb
3105	AA AUUCK CASUAL	Sample	1	M	S	1	<input type="checkbox"/>				
3106	AAC ChCh CASUAL	Sample	1	M	S	1	<input type="checkbox"/>				
3177	AAH Ham CASUAL	Sample	1	M	S	1	<input type="checkbox"/>				
4592	ABBOTT	Katrina	1	F	S	1	<input type="checkbox"/>				
5175	ABBOTT	Melissa	1	F	S	1	<input type="checkbox"/>				
5306	ABDI	Amina	1	F	S	1	<input type="checkbox"/>				
5305	ABDI	Anisa	1	F	S	1	<input type="checkbox"/>				
5372	ADAMS	Donna	1	F	S	1	<input type="checkbox"/>				
5416	Addis	Stephen James	1	M	S	1	<input type="checkbox"/>				
5818	ADEN	FARAH	1	M	S	1	<input type="checkbox"/>				
5516	ADRIAN	Barry	1	M	S	1	<input type="checkbox"/>				
4995	AH DAR	Jones	1	M	S	1	<input type="checkbox"/>				
4755	AHMED	Zubair	1	M	S	1	<input type="checkbox"/>				
5143	AIYAO	Fatu Isaac	1	M	S	1	<input type="checkbox"/>				
4811	AINSLEY	JOHNATHAN	1	M	S	1	<input type="checkbox"/>				
5525	Aitken	Emma	1	F	S	1	<input type="checkbox"/>				
5058	AVI	Ulisee	1	M	S	1	<input type="checkbox"/>				
5577	AL KAJAJE	Raed	1	M	S	1	<input type="checkbox"/>				
1032	Al-Safwani	Amar	1	M	S	1	<input type="checkbox"/>				
4800	ALAEUA	Jennifer Hikuleou	1	F	S	1	<input type="checkbox"/>				
5904	Albert	Jace	1	M	S	1	<input type="checkbox"/>				
4338	ALI	Abraham	1	M	S	1	<input type="checkbox"/>				
3642	ALI	Sajjad	1	M	S	1	<input type="checkbox"/>				
5115	ALLAN	Belinda	1	F	S	1	<input type="checkbox"/>				
5157	ALLEN	Anthony	1	M	S	1	<input type="checkbox"/>				
4527	ALLEN	Peter	1	M	S	1	<input type="checkbox"/>				

Just make your changes (the yellow fields can't be changed, and they stay visible even when you're editing way over on the right hand side (like frozen cells in Excel). When done, click the Close "X" in the corner or use Ctrl+F4 to close the form. Changes are effective the moment you make them – so take care.

## The RedBadge tab

This is provided in Employee..Options, and provides access to individual employee settings specific to security organisations:

More details for Andrew 1

Contract   Apprenticeship   Miscellaneous   **RedBadge**   OK

Rating: 1

Role: S

Training level: 1

Phone2:

Phone3:

Suburb:

COA'S-SO#:

Comments:

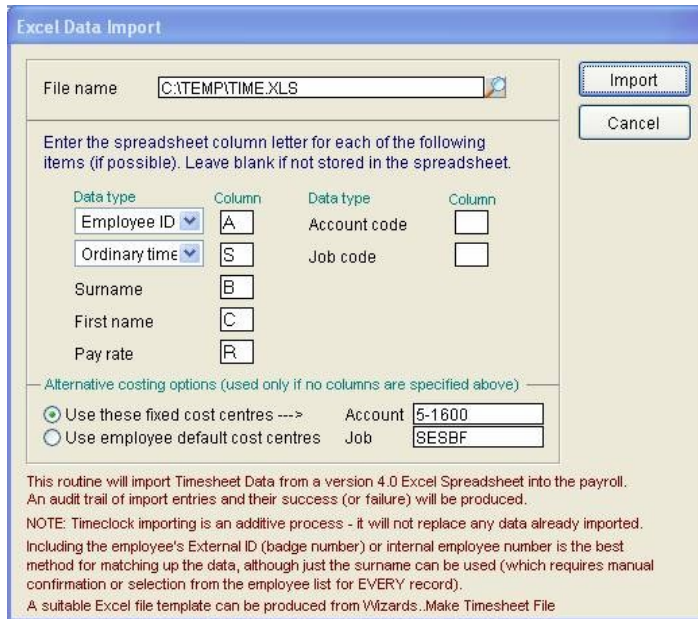
Fire Warden

A mass update grid is available from Wizards..ToolBox

## Importing Timesheets

Now we get to the important bit – importing time data from a returned spreadsheet. As long as it hasn't been hashed around too much, you should be able to import it in the usual manner via Wizards..Excel File

Import..Timesheets. The following settings are typical for the new format timesheet:



The image shows a dialog box titled "Excel Data Import". It has a "File name" field containing "C:\TEMP\TIME.XLS" and "Import" and "Cancel" buttons. Below this, it asks to "Enter the spreadsheet column letter for each of the following items (if possible). Leave blank if not stored in the spreadsheet." There are two columns of data type and column letter mappings. The first column lists "Employee ID" (A), "Ordinary time" (S), "Surname" (B), "First name" (C), and "Pay rate" (R). The second column lists "Account code" and "Job code", both with empty boxes. Below this is a section for "Alternative costing options" with two radio buttons: "Use these fixed cost centres --->" (selected) and "Use employee default cost centres". The selected option has "Account" set to "5-1600" and "Job" set to "SESBF". At the bottom, there is a note: "This routine will import Timesheet Data from a version 4.0 Excel Spreadsheet into the payroll. An audit trail of import entries and their success (or failure) will be produced. NOTE: Timeclock importing is an additive process - it will not replace any data already imported. Including the employee's External ID (badge number) or internal employee number is the best method for matching up the data, although just the surname can be used (which requires manual confirmation or selection from the employee list for EVERY record). A suitable Excel file template can be produced from Wizards..Make Timesheet File".

Click Import – as long as everything is good in the file, a full import of timesheet data for over 400 staff takes **under one minute.**

Feel free to contact our HelpDesk if you have any questions.

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