

Getting your HumanManager 4.0 Ready for Year 2009 operations

Introduction

Rolling your payroll system over to the next processing period at the end of your monthly payroll operations is a normal monthly procedure.

We however like to remind you of another STANDARD payroll processing procedure that happens just once in a year - END OF YEAR RUN!

This document contains an easy to follow guideline on how to achieve a smooth END OF YEAR RUN processing on HumanManager 4.0.

... Please ensure that this exercise is given the required timely attention

Objective

A successful END OF YEAR RUN will ensure your system is;

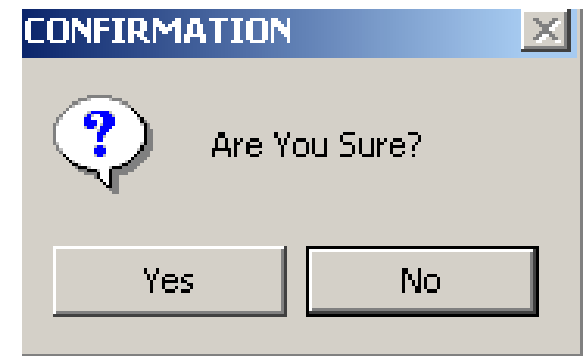
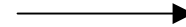
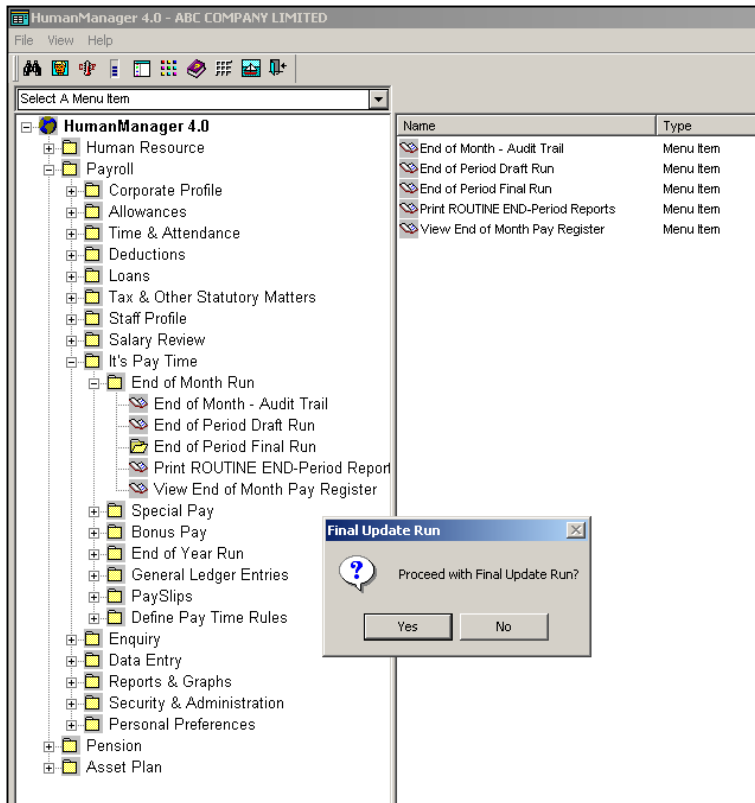
- Closed effectively for this year's operations
- Ready to commence PAYE Tax calculations for a new year
- Configured to maintain accurate Year-to-Date figures

Section A: Monthly Payroll Processing Step 1: Run December Payroll

1. Capture all variations for December 2008
2. Print all relevant reports
3. Post journal

Section B: End-of-Year Final Update Run

Step 1: Navigate to End of Month Run and Click on End of Period Final Run Menu

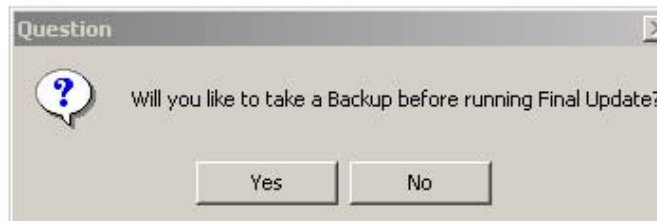
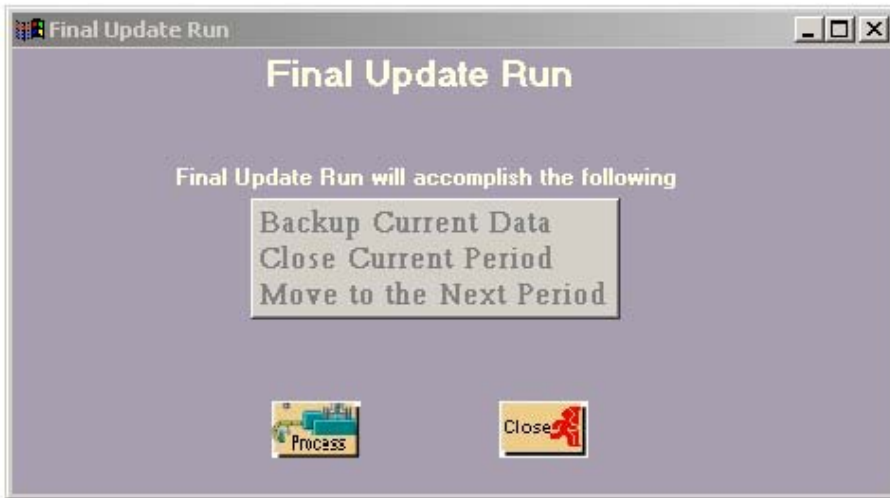


Click Yes

Section B: End-of-Year Final Update Run – Cont.

Click Yes to take an external backup

After your external back-up has been taken, you can recommence your final Update Run process



Section B: End-of-Year Final Update Run

Kindly confirm current Payroll operations in your organisation to select any of the following applicable Next Steps:

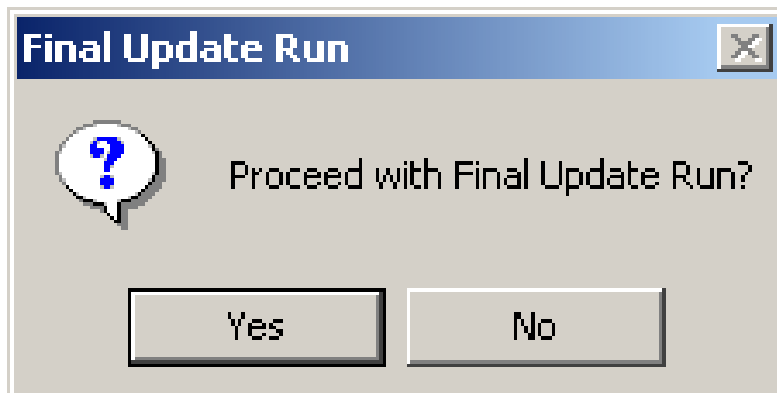
Step 2: Your organisation's payroll is:

- (a) Run based on your Financial Year which is same as the calendar year (Jan– Dec)
- (b) Run based on your financial year which is different from Jan – Dec calendar year.
- (c) Run based on Jan – Dec calendar year which is different from your financial year.

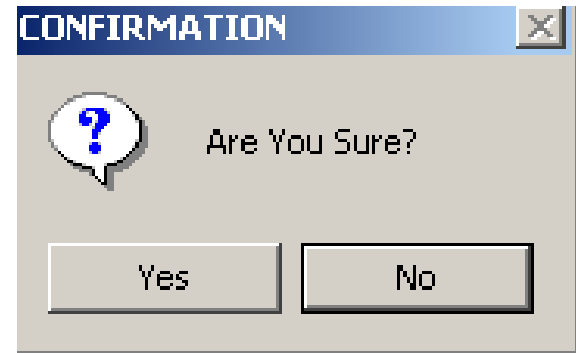
Section B: 2a. Financial Year same as Calendar Year

Navigate as follows:

Payroll Setup → It's Pay Time → End of Month Run → End of Period Final Run

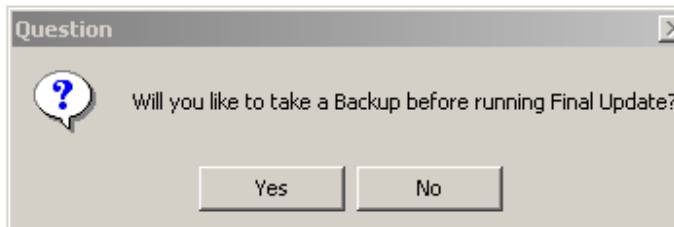
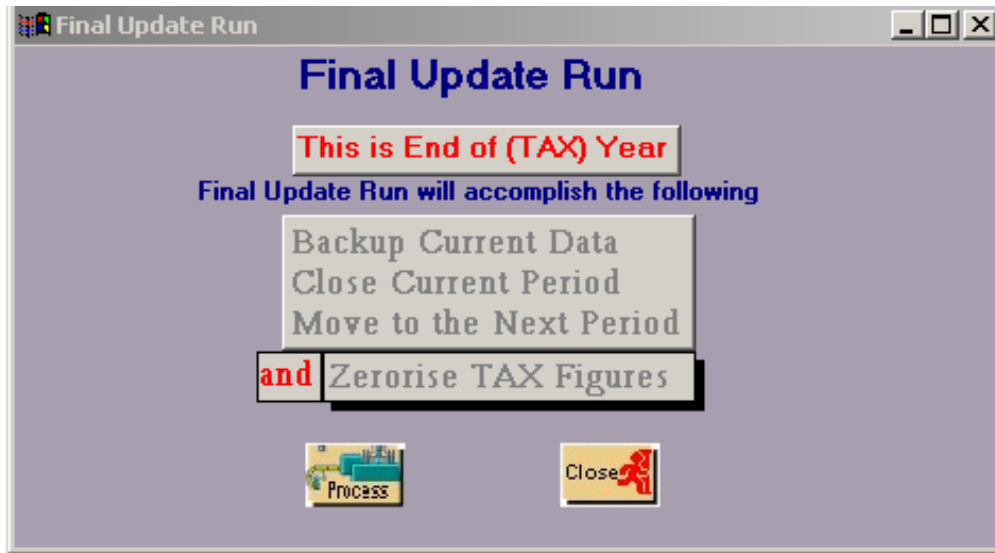


Click *Yes* to confirm your request



Click *Yes*

Section B: 2a. Financial Year same as Calendar Year

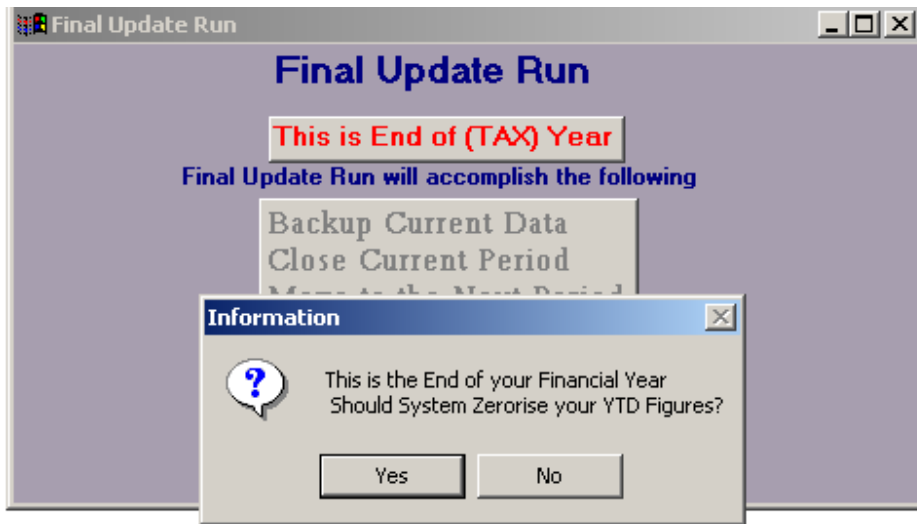


Note

Bypass backup option if you had done this earlier.

Section B: 2a. Financial Year same as Calendar Year

Final update process presents an option for you to zerorise Year-To-Date figures or not.



- i. Select *Yes* to zerorise all Year-To-Date figures. With this option you have successfully achieved an automatic Rollover of your system for 2009 operations.
- ii. Select *No* to initiate [Selective End of Year](#) zerorisation for Year-To-Date figures.

At the end of this step, kindly exit HumanManager and re-login.

Section B: 2b. Financial Year Different from Calendar year

Your organisation's payroll is run based on your financial year which is different from Jan – Dec calendar year.

Final update run under this payroll operation terminates after the update.

You have successfully achieved an automatic rollover of your system, kindly exit HumanManager and re-login to commence work on your payroll for January 2009.

Section B: Step 2c. Financial Year Different from Calendar year

Your organisation's payroll is run based on January – December calendar year which is different from your financial year.

Final update run under this payroll operation terminates after the update.

You have successfully achieved an automatic rollover of your system, Kindly exit HumanManager and re-login to commence work on your payroll for January 2009.

You can initiate the [Selective End of Year Run](#) to initialise Year-To-Date figures of desired payroll items.

Step 3: Selective End of Year Run

This process is used to zeroise Year-To-Date figures of selected pay items. It enables you initialise figures for pay items of your choice at specific period of your choice.

The screenshot displays the HumanManager 4.0 interface for ABC COMPANY LIMITED. The left-hand tree view shows the 'Payroll' section expanded, with 'End of Year Run' selected. The main window shows a table of menu items:

Name	Type
End of Year Re-Run	Menu Item
Selective End of Year Run	Menu Item
View Your Year End Reports	Menu Item

The 'Selective End of Year Run' dialog box is open, titled 'Zerorise Year to Date Figures'. It contains the following fields and options:

- Employee Number:** From & To
- Select An Indicator:** Select An Indicator, All Except TAX
- Allowances:** Regular, Daily
- Deductions:** Regular, Daily
- Others:** Basic, Overtime, Tax
- Code:** From To

Buttons for 'Process' and 'Close' are visible at the bottom of the dialog. A status bar at the bottom of the dialog reads: 'The employee number range you want to process'.

Step 3: Selective End of Year Run – Cont.

Selective End of Year Run

Zerorise Year to Date Figures

Employee Number From & To &

Select An Indicator All Except TAX

Allowances	Deductions	Others
<input type="radio"/> Regular	<input type="radio"/> Regular	<input type="radio"/> Basic
<input type="radio"/> Daily	<input type="radio"/> Daily	<input type="radio"/> Overtime
		<input type="radio"/> Tax

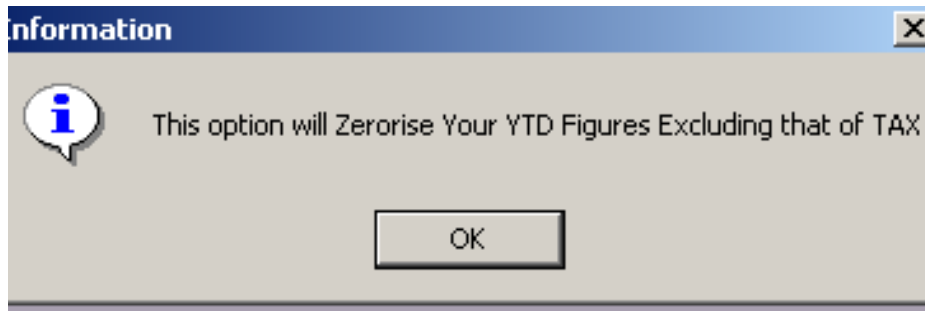
Code From To

The employee number range you want to process

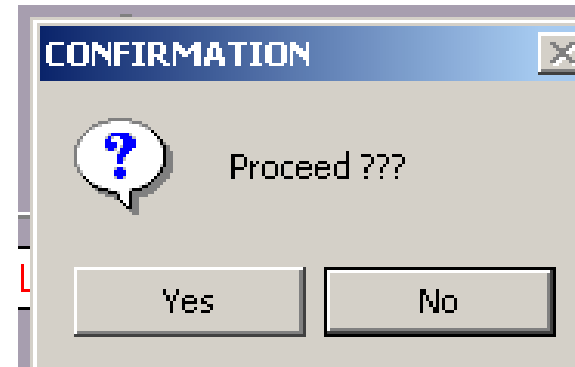
- From the list of drop down select the range of employees for whom you wish to zerorise their figures
- At this point you can make a choice between “**Select an Indicator**” or “**All Except Tax**” radio buttons
- **All Except Tax** option will initialize all pay items except for Tax(which has been initialised during the *Final Update Run*).
- **Select an Indicator** option gives you the opportunity to select from a list of allowances, deductions and other pay items you wish to initialise. Repeat process as many times as may be required.

Step 3: Selective End of Year Run – Cont.

All Except Tax option will initialize all pay items except for Tax(which has been initialised during the *Final Update Run*).



Click on the *OK* button to confirm your desire to continue with the operation.



Click on *Yes*

Step 3: Selective End of Year Run – Cont.

Select an Indicator option gives you the opportunity to select from a list of allowances, deductions and other pay items you wish to initialise. Repeat process as many times as may be required.

Carry out your *End of Period Draft Run* and your HumanManager is ready for January 2009 Payroll Processing.

Happy New Year!!!