This document provides basic instruction on the Payroll process.

The **Payroll** process uses the following:

- *Opportunity – Faculty Agreements*
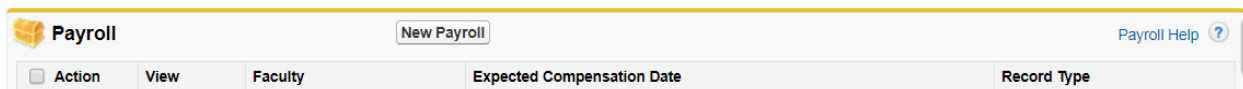- *Opportunity - Faculty Expenses*
- *Payroll*

There can be two types of Payroll records: Unlocked payroll records indicate that the record has not yet been paid and is still open for editing; Locked payroll records indicate that the Payroll record has been processed, sent to Babson Finance for entry into the Babson College Finance system and is no longer editable.

Every Payroll must be associated to a BEE Program Offering. This relationship supports reporting of all Offering-related expenses.
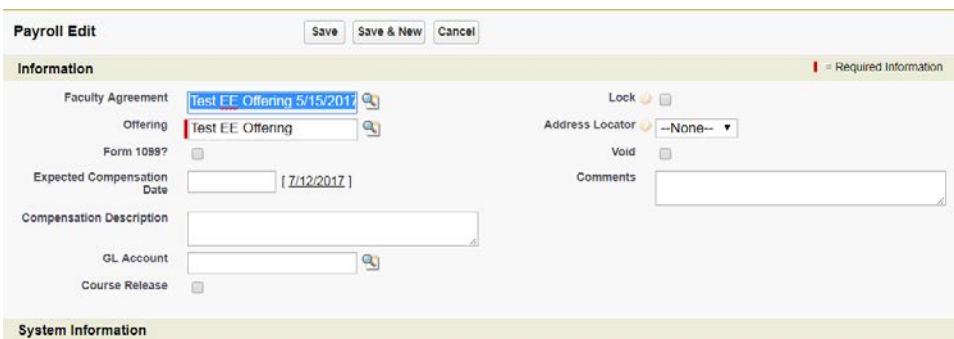
Creating Payroll records

When payroll is related to a Faculty Agreement or Faculty Expense, a Payroll record can be created from those respective records.

1. Navigate to the Faculty Agreement or Faculty Expense record from the Opportunity tab. Alternatively, you can find the Faculty Agreements/Expenses from the Offering record.
2. Click [New Payroll] from the Payroll related list.

3. Notice the new Payroll record will be pre-populated with the Faculty Agreement/Expense name and the related Offering name.
4. Fill out the fields.

5. Click [Save]
6. Notice that the fields in the Payee section are auto-populated:
    a. Faculty name is pulled from the Faculty Agreement
    b. Total Compensation is the Amount of the Faculty Agreement
    c. US Citizen and Employee ID are pulled from the Faculty's Contact record.
    d. Payee Address field will pull the Faculty's address according to the Address Indicator field.

    If the Payee Address field is left blank or an address is not entered on the Faculty's Contact record, the following message will display "Error: Payroll/Address Location or Contact/Preferred Address not specified"

Payroll might also be created manually if it is not related to a Faculty Agreement or Faculty Expense.

1. Navigate to the Payroll tab and click the [New] button
2. Select the default value "Unlocked" as the Record Type
3. Fill out the fields.
4. Click [Save]
5. Notice that the fields in the Payee section are auto-populated. (See #6a-d above for details)

Processing Payroll records

Payroll records to be paid with the next payroll process will be identified, marked as "locked" and exported to Babson Finance for entry into the GL.

Find Payroll records for processing
Users can identify Payroll records to be paid in the next payroll cycle by using a listview. A listview called "Payroll to be paid next cycle" has been created to identify "unlocked" payroll record with an Expected Pay Date earlier than (<=) Next month. Using this listview, users can "Lock" multiple records at one time.

 (Remember, if these criteria need to be adjusted, Listviews can be easily updated to produce different results.) Navigate to the Payroll tab

1. Find the Listview below and click Go

    Payroll
    Home

    View: | Payroll to be paid next cycle ▾ | | Go! | Edit | Create New View
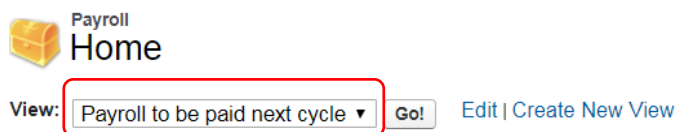
2. Select those payroll record to be paid; Double click the "Lock" field of one of the selected records.

    | Payroll to be paid next cycle ▾ | Edit | Delete | Create New View

    | New Payroll | ↻ | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

	Action	View ↑	Faculty	Faculty Agreement	Total Compensatio...	Expected Compens...	Lock
	Edit | Del	View	Bill Browne	Test EE Offering 5/...	$5,980.00	6/30/2017	
	Edit | Del	View	Bill Browne	Test EE Offering Fa...	$8,000.00	7/21/2017	
	Edit | Del	View	Bill Browne	Test EE Offering 5/...	$5,980.00	5/15/2017	

3. Click the "Lock" field in the pop-up box and select Apply Changes to all # records.
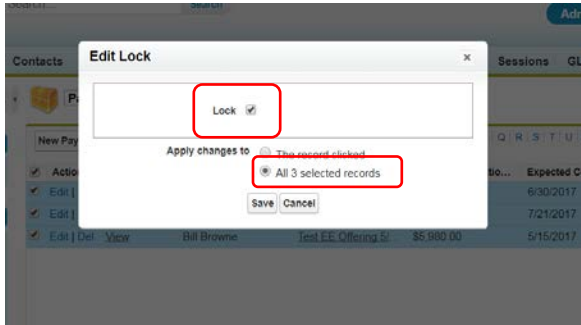
Exporting Locked Records

A sample report (shown below) has been created to identify "unlocked" payroll records with particular date criteria.   Using reports, users can adjust Time Frames to export Locked records and send the exported file to Babson Finance for entry into the GL system.

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