	<u>NAVHRPT 7.01 User Guide</u> <u>Human Resources</u>	MBS_DT006
	Project: CRONUS International Ltd. Area: <i>Human Resources</i>	1/13

Microsoft Dynamics® NAVHR

Support Knowledge Database FAQ

Human Resources

ARQUICONCONSULT TEAM
October, 2013

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	<u>NAVHRPT 7.01 User Guide</u> <u>Human Resources</u>	MBS_DT006
	Project: CRONUS International Ltd. Area: Human Resources	2/13

Table of Contents

HOW CAN I HIRE AN EMPLOYEE?.....3

WHERE CAN I FIND EMPLOYEE DATA?4

HOW CAN I UPDATE EMPLOYEE DATA?4

Direct Maintenance4

Maintenance by Wizard5

HOW CAN I INCREASE A SALARY OF AN EMPLOYEE?6

DOES THE SYSTEM KEEPS AN HISTORY OF MODIFICATIONS?6

HOW CAN I TERMINATE A CONTRACT ?7

HOW CAN I RE HIRE AN EMPLOYEE?.....8


HOW CAN I RECORD ABSENCES AND OVERTIME?.....9

HOW CAN I PAY BONUS, COMISSIONS AND OTHER MONTHLY REMUNERATIONS? 10

HOW CAN I PROCESS COMPANY PAYROLL? 11

HOW CAN I ISSUE A PAYSLLIP? 12

Support Knowledge Database - FAQ.docx	Date:	Autor:	Checked:	Validated:
	2013-10-01	SES		

	<u>NAVHRPT 7.01 User Guide</u> <u>Human Resources</u>	MBS_DT006
	Project: CRONUS International Ltd. Area: <i>Human Resources</i>	3/13

HOW CAN I HIRE AN EMPLOYEE?

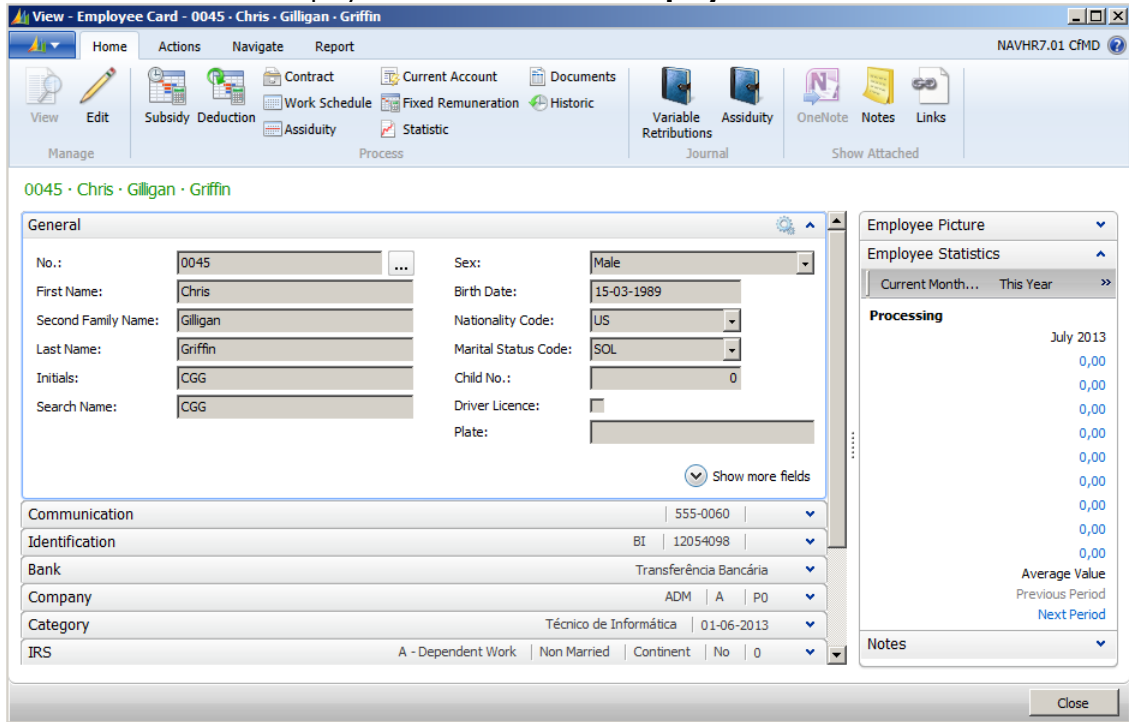
The process of hiring an employee starts on the **Interaction Sheet** by the selection of operation **Employment**. Looking further ahead, types **Change** and **Termination** concern to the update the registration and departure of employees, respectively.

In the case of an **Employment**, the **Employee Number** shall only be completed if the numbering is manual. Otherwise, the **NAVHR** will determine the number of employee in the conclusion of the **Wizard of Employment**, assuming the number following at the last number of the existing employee.

Support Knowledge Database - FAQ.docx	Date:	Autor:	Checked:	Validated:
	2013-10-01	SES		

WHERE CAN I FIND EMPLOYEE DATA?

The information about Employees is available in the **Employee Card**



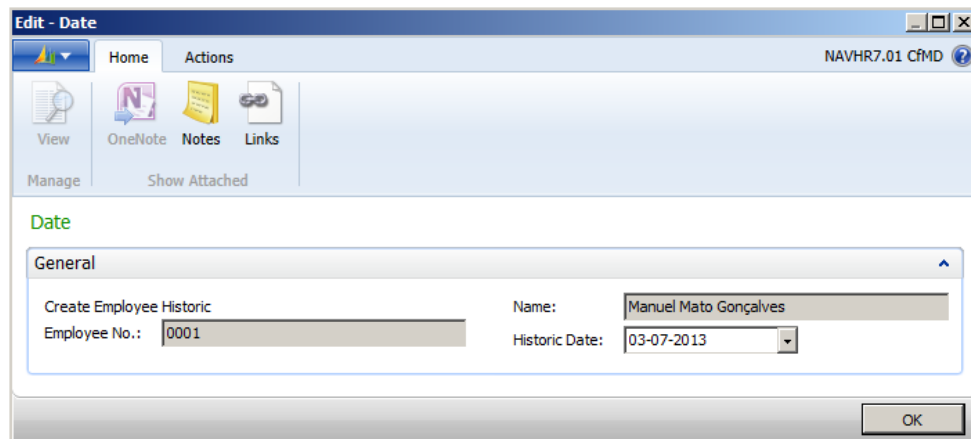
HOW CAN I UPDATE EMPLOYEE DATA?


There are several ways to keep the register of an employee.

Direct Maintenance

When the change is minor and there is no danger of forgetting to update a given, can be made directly to the Employee Card.

In the example below, has changed the phone number of the employee who was hired.



	<u>NAVHRPT 7.01 User Guide</u> <u>Human Resources</u>	MBS_DT006
	Project: CRONUS International Ltd. Area: Human Resources	5/13

After the change, the **Historic Window**, it gives the record date, and corresponds to the last day on which the initial situation prevailed. By default, assumes the date of the day the change. Note that if the change is being performed on the same day that the loan was made (regardless of date of admission), it appears the **Historic Window** to the extent assumed by default that an amendment on the same day admission is due to incorrect starting time of employee admission, not doing so save the historic sense of the previous situation. Similarly, you cannot make changes by registered prior to employee admission date.



Maintenance by Wizard

If the changes are more substantial and go through various aspects of the Employee Card, may be important - not to forget any way - do it through the **Interaction**. This time, the **Type** you choose is **Change**, and must identify the employee and the date of the amendment, which



corresponds to the last day of the initial situation. Then it is a matter of pressing the button



to  until it is active : by changing what there is to change. An example of this type of change is the Civil Status, which can interfere with the State Civil and address, for example.

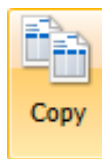
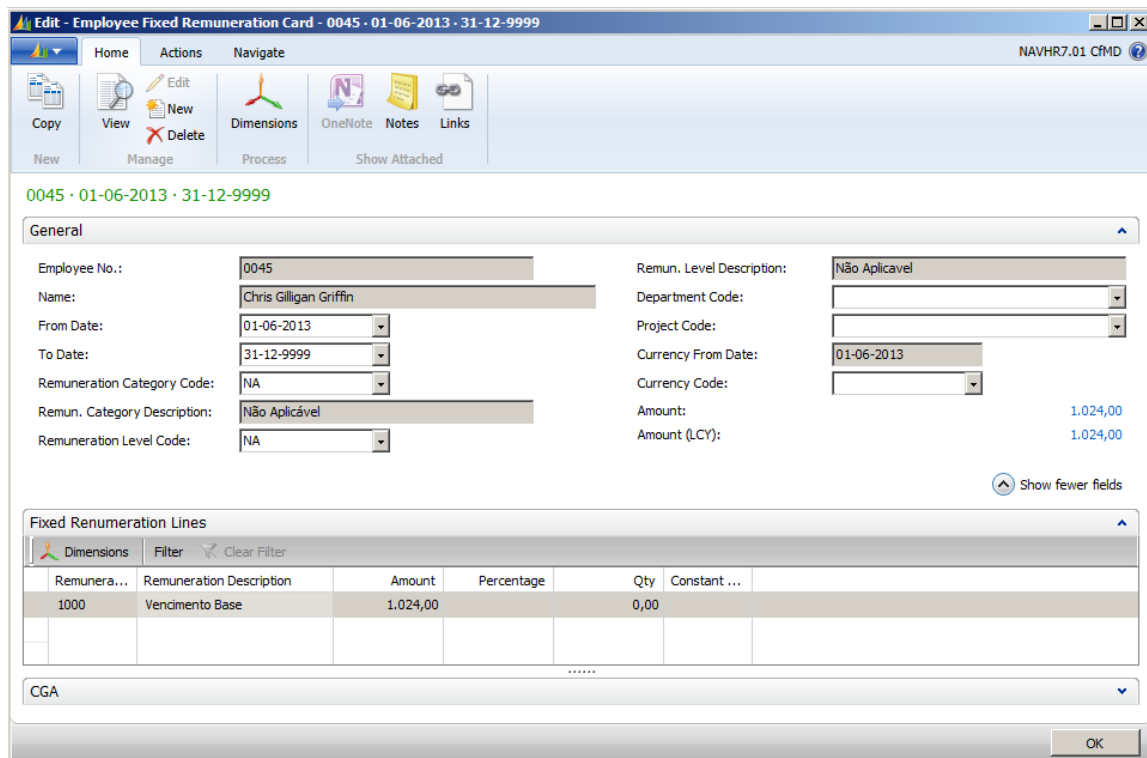
Support Knowledge Database - FAQ.docx	Date:	Autor:	Checked:	Validated:
	2013-10-01	SES		

HOW CAN I INCREASE A SALARY OF AN EMPLOYEE?

When the information is not to update at the **Employee Card** but the attributes associated with it, and these are fixed in time for dates, also may be necessary to update.

If it is to define a record, just change the date that is in the field by the date.

If it is to introduce a new (to maintain the historical baseline, so you can insert a new record and use the **Copy** that exists in most attributes, the level of the leftmost button on the bottom right.

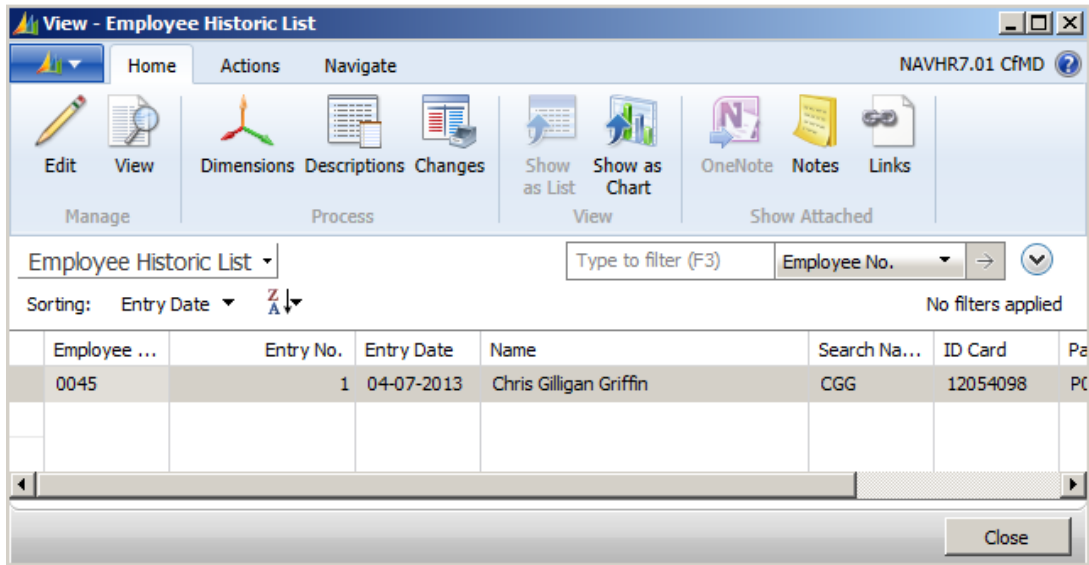
This feature copies to a new record everything which appears on the original, with the exception of dates. If these overlap in relation to the ancient record, it will suffer a limitation in terms of their dates so that there is no overlap of records in the same time interval.

DOES THE SYSTEM KEEPS AN HISTORY OF MODIFICATIONS?

In terms of **Employee Card**, **Employee History** is available to drill down in the box or the **Administration** tab button or by **Employee**.

Whatever form it takes, you can access the **Historic List**.

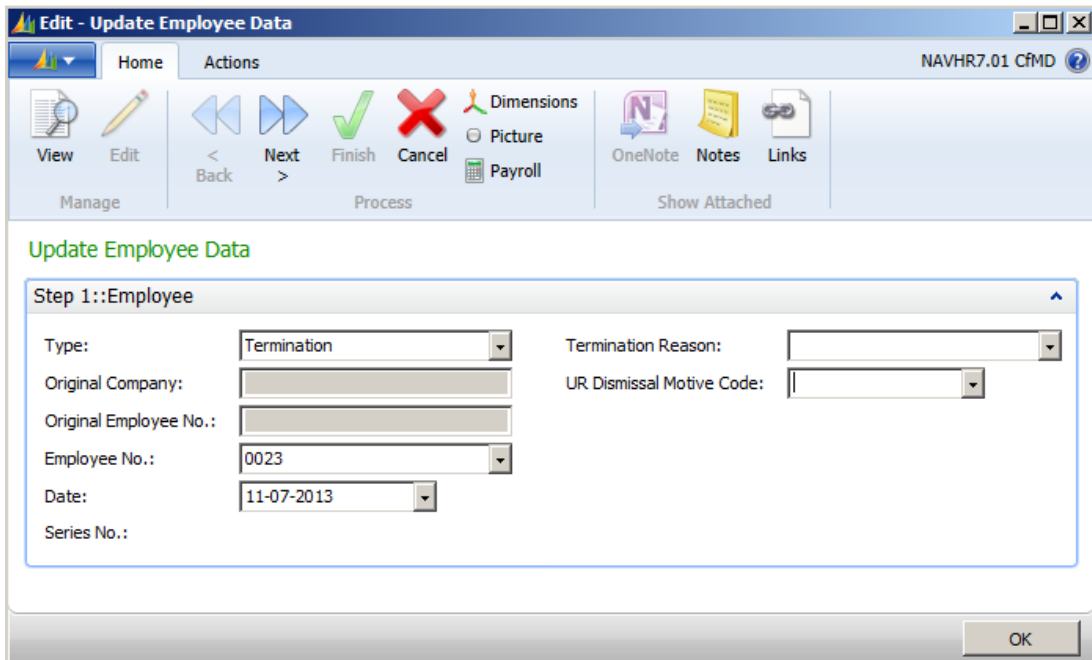
Support Knowledge Database - FAQ.docx	Date:	Autor:	Checked:	Validated:
	2013-10-01	SES		



By press the button **Employee Historic**, you can access the card of de selected record.

The Historic is in many ways similar to the **Employee Card** but is not editable and contains no Administration separator.

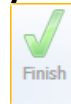
HOW CAN I TERMINATE A CONTRACT ?



The operation of Termination when an employee leaves the company is also made at the level of **Interaction**. In this case, the type of **Interaction** is expected to be **Termination** and should be completed not only the date but also the **Employee No.** The process begins by pressing a




button



, repeating the process until you finish that is, when the button is enabled:

Support Knowledge Database - FAQ.docx	Date:	Autor:	Checked:	Validated:
	2013-10-01	SES		

	<u>NAVHRPT 7.01 User Guide</u> <u>Human Resources</u>	MBS_DT006
	Project: CRONUS International Ltd. Area: Human Resources	8/13




Data are not editable so that if there is certain information is missing, must be canceled the process, updated data and then repeated the Termination process.



HOW CAN I RE HIRE AN EMPLOYEE?

There is also the process of Readmission. If an employee has left the company then returns, the number and form of this employee can be recovered, thus making it more streamlined registration.



The Readmission process begins by pressing a button , and this indicates that the system that the current screen is given as fully completed, can advance to the next until the process

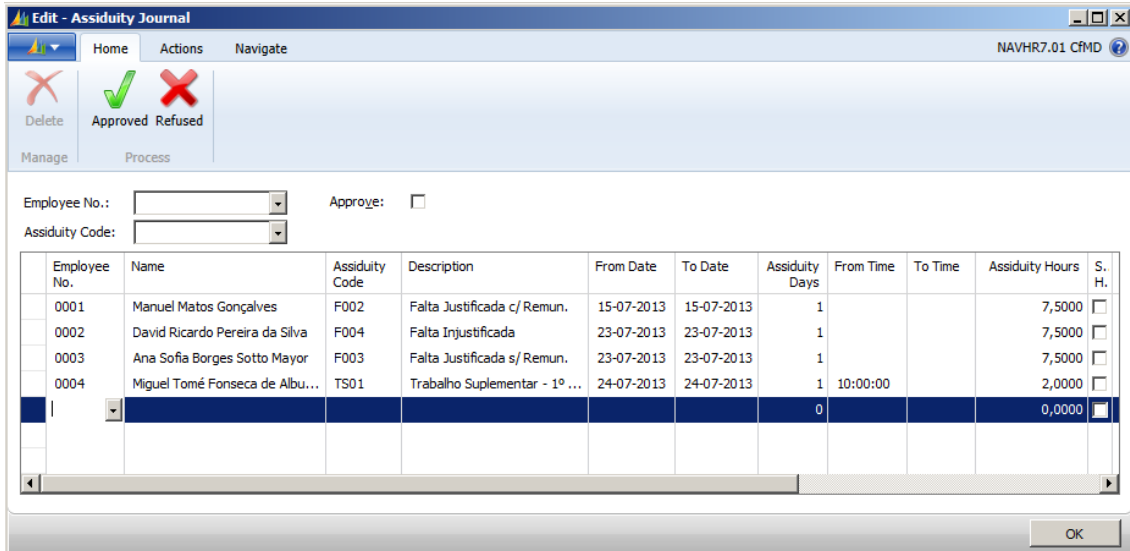


finishes,  that is, when the button is enabled . All data are assumed constant except the contract, schedule and the fixed remuneration, which will appear blank.

Support Knowledge Database - FAQ.docx	Date:	Author:	Checked:	Validated:
	2013-10-01	SES		

HOW CAN I RECORD ABSENCES AND OVERTIME?

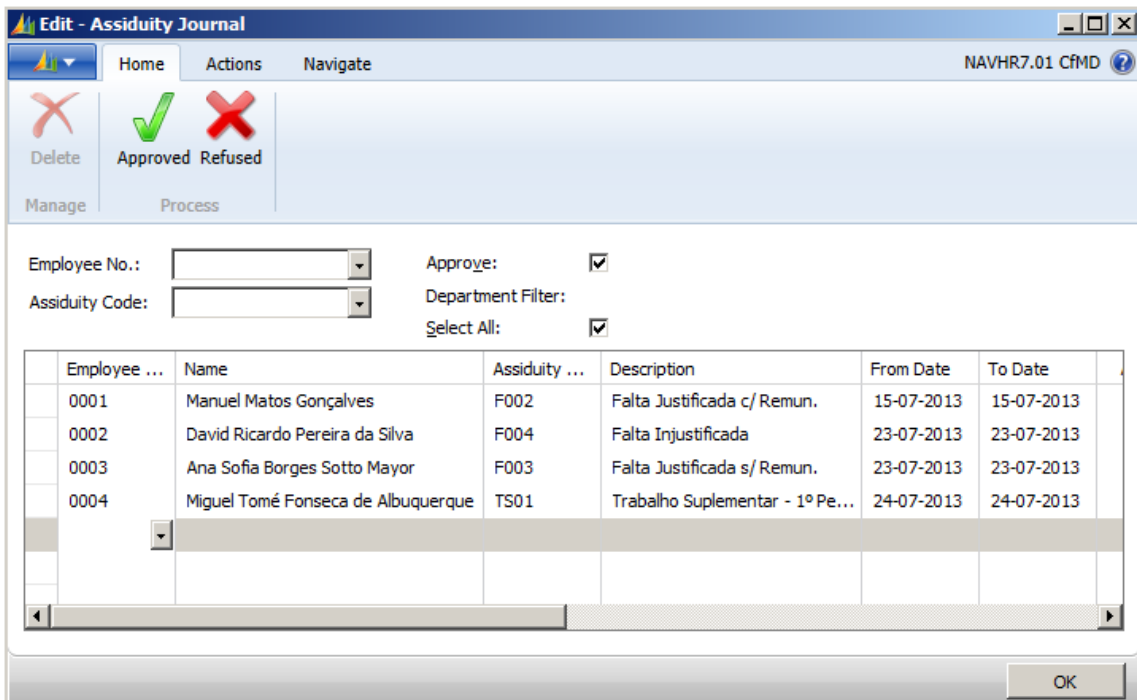
Absences and OverTime are recorder through the **Assiduity Journal**.



Employee No.	Name	Assiduity Code	Description	From Date	To Date	Assiduity Days	From Time	To Time	Assiduity Hours	S. H.
0001	Manuel Matos Gonçalves	F002	Falta Justificada c/ Remun.	15-07-2013	15-07-2013	1			7,5000	<input type="checkbox"/>
0002	David Ricardo Pereira da Silva	F004	Falta Injustificada	23-07-2013	23-07-2013	1			7,5000	<input type="checkbox"/>
0003	Ana Sofia Borges Sotto Mayor	F003	Falta Justificada s/ Remun.	23-07-2013	23-07-2013	1			7,5000	<input type="checkbox"/>
0004	Miguel Tomé Fonseca de Albu...	TS01	Trabalho Suplementar - 1º ...	24-07-2013	24-07-2013	1	10:00:00		2,0000	<input type="checkbox"/>
						0			0,0000	<input type="checkbox"/>

Absences can be released in days or hours, and both may have a generally pay only the food effect, or any remuneratediscount. Everything depends on the parameterization.

The Assiduity registration does not mean, however, that these records are in a position to be processed. First, we must approve them, marking the field **Approve**.



Employee ...	Name	Assiduity ...	Description	From Date	To Date
0001	Manuel Matos Gonçalves	F002	Falta Justificada c/ Remun.	15-07-2013	15-07-2013
0002	David Ricardo Pereira da Silva	F004	Falta Injustificada	23-07-2013	23-07-2013
0003	Ana Sofia Borges Sotto Mayor	F003	Falta Justificada s/ Remun.	23-07-2013	23-07-2013
0004	Miguel Tomé Fonseca de Albuquerque	TS01	Trabalho Suplementar - 1º Pe...	24-07-2013	24-07-2013

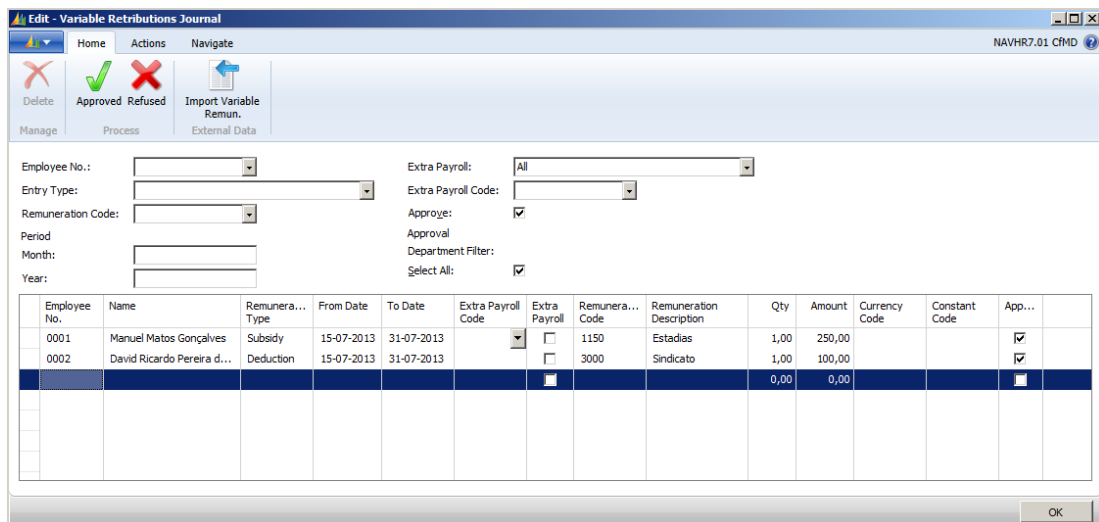
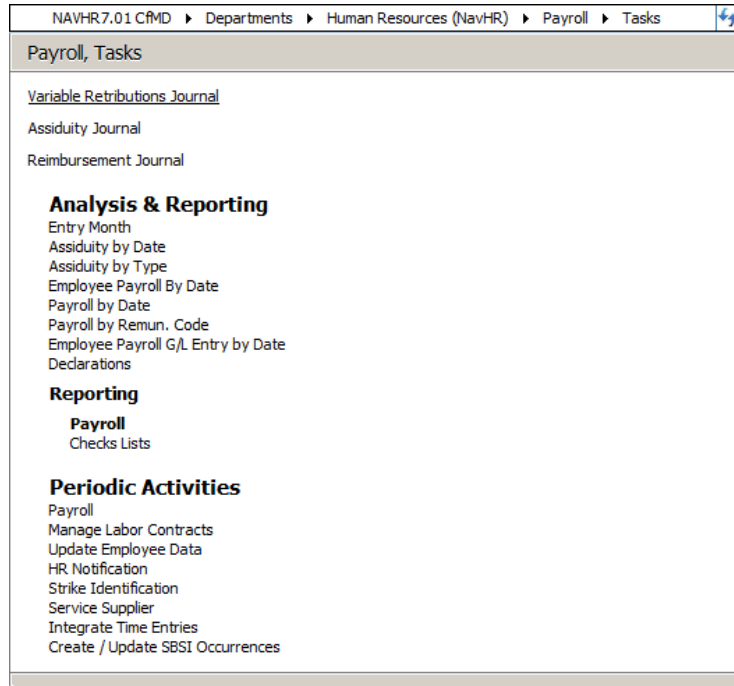
By marking also in the field **Approving** for records to which it intends to give approval, we are able to press the button **Administration** and Approve or Reject. Another way to put the records to the Status **In Approval** is by pressing the **Select All**.

Support Knowledge Database - FAQ.docx	Date:	Author:	Checked:	Validated:
	2013-10-01	SES		

When the records are approved, they are no longer visible in the **Assiduity Journal**, being necessary to go to **Employee Assiduity Card** to consult, modify or delete.

HOW CAN I PAY BONUS, COMISSIONS AND OTHER MONTHLY REMUNERATIONS?

Treatment of Variable Remunerations registration is almost identical to the Assiduity. It is also used a Journal where remuneration types are set.



Even the operation of the Journal is similar. By indicating the **Employee Number**, **Entry Type** (Subsidy or Deduction), the **Remuneration Code**, the **Extra Payroll** the system can simultaneously filter and insert a record with these features, assuming the dates of the first and last days the month in the period. However, it is also possible to release records with **To Date** 31-12-9999 in the field. The criterion for a remuneration to be variable and not fixed concerns

over the technical level, the fact that only a fixed remuneration to enter the calculation of the value by hour and value by day. If the remuneration is a constant associated with the parameter, just release the quantity that has immediate value. Remember that any decimal field allows simple arithmetic operations on it.

Depending on how they are parameterized, it is possible to have registrations in value, in percentage or amount, based on a constant or not.

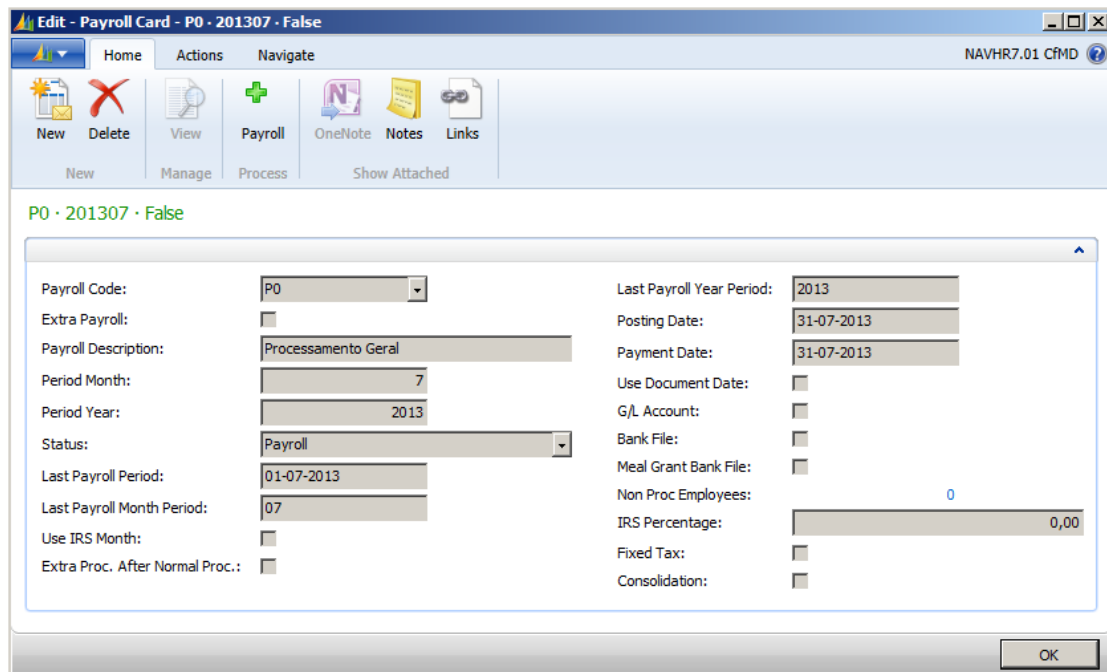
The approval process is also identical to the Assiduity.

To view or modify the records after approval, we need to go Variable Remunerations in Employee Card, Employee button and access to Subsidy and Deductions as appropriate, and the **Reversal** procedure and **Approval** or **Refusal** similar to **Assiduity**.

HOW CAN I PROCESS COMPANY PAYROLL?

By accessing the **Payroll List Card** it is included in **Periodic Activities**, because it's not used every day.

In this option, we can select the **Payroll List Card** which corresponds to periods for the employee's payroll. In this option, we can select the Payroll list, which corresponds to periods of processing employees. The **Payroll List Card** it's also used to configure **Payroll** periods. Fields used in retroactive calculation (**Last Payroll Period**), the date to be inserted into the Banking Transfer List (**Payment Date**) and the Accounting Date (**Posting Date**) are completed in this card.

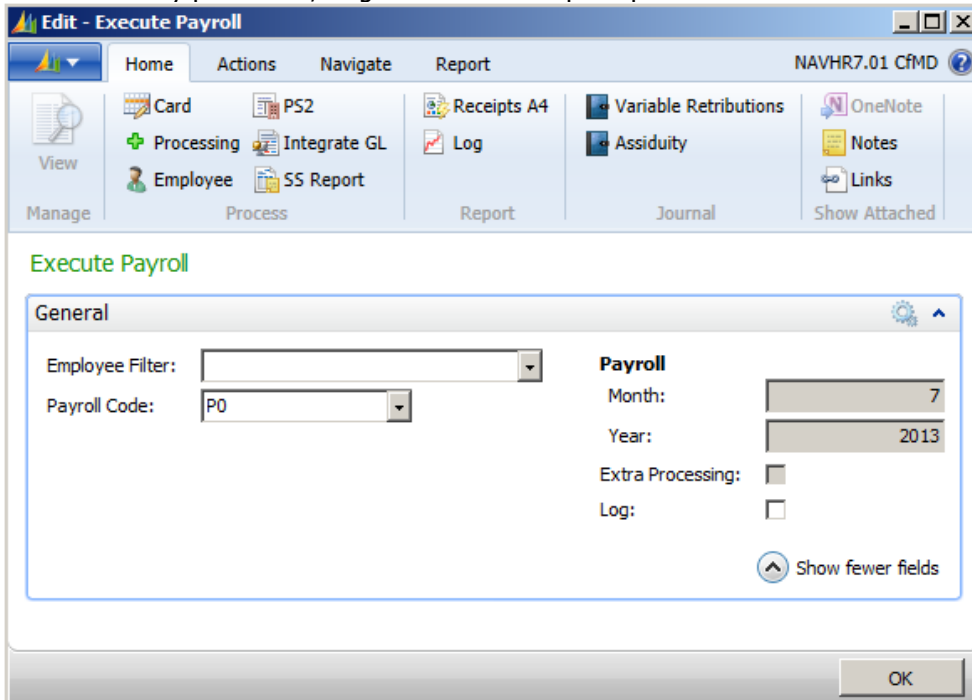


In **Employee Filter**, are given all employees for payroll process. If the field is blank, it is assumed that all employees are included in this payroll. Alternatively, you can process a single employee,

Support Knowledge Database - FAQ.docx	Date:	Autor:	Checked:	Validated:
	2013-10-01	SES		

a set or range. In the **Payroll Code** should indicate which processing to be performed. These should be in the order of number indicated.

Pressing the **Processing** button, the process starts, displaying a progress bar and percentage of records already processed, to give the user the perception of time which would take the case.



In case you are processing multiple records, you may see a progress bar to give the perception of the evolution of processing

HOW CAN I ISSUE A PAYS LIP?

Once the process is finished, it can be printed or at least see the receipts (PaySlips) in the screen.

In **Employee** tab it is possible to filter Employees by Number.



NAVHRPT 7.01 User Guide Human Resources

Project: **CRONUS International Ltd.**
Area: *Human Resources*

MBS_DT006

13/13

In the second tab is to be given time and the number of copies. If not 0, for each person are sent two copies of the receipt: one identified as the Original (s) other (s) and Duplicate (s).

Remuneration Receipt

Employee No.	0001			
Category Description				Manuel Matos Gonçalves
VAT Registration No.	214027520			Rua Sidónio Pais, nº 17
Period:	JULY 2013			1685-028 CANEÇAS
Establishment Description				
R. monthly base:	2.000 €			
Department Code	ADM			

Description	Period	Qty.		Income	Deduction
Vencimento Base	07-2013	0		2000,00	0
Segurança Social	07-2013	11	%	0	221,44
IRS	07-2013	30	%	0	603,00
Totals				2000,00	824,44
				Liquid Total	1175,56 GBP
				Total to Transfer	1175,56 GBP

Value day:	66,67
Value Hour:	12,31
Nº of Monthly Hours	162,5 Hours

Support Knowledge Database - FAQ.docx	Date:	Autor:	Checked:	Validated:
	2013-10-01	SES		