



2010

PenSoft Employee Tracker

*Quick Start Guide*

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License Agreement and Warranty information can be found in the complete manual or in the online help file.

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In-depth explanations and instructions can be obtained from the online help file within PenSoft Employee Tracker or from the complete manual included on the trial software CD. To access the manual, explore the CD, and double click the manual folder. The manual, in PDF format, and Adobe Acrobat Reader are included on the CD.

# INSTALL THE SOFTWARE

Close all programs, including any anti-virus software.

- Insert the 2010 CD into your CD-ROM drive.
- Make your menu selection.

The setup program will prompt the user for a path to install the program. The default is C:\Program Files\PenSoft\Employee Tracker. It is usually best to accept the default. If Employee Tracker is installed on Windows Vista create a default installation path in advance at C:\Users\Public\Employee Tracker. Browse to this location when installing.

## START A NEW COMPANY

The New Company wizard will guide the process of creating databases for a new company. The process varies if PenSoft Payroll is installed.

### Using PenSoft Payroll

If PenSoft Payroll is installed there will be two options:

- Create a company from scratch.
- Create a company by reading initial company, employee, and 1099-MISC recipient (if applicable) from a PenSoft Payroll company.

To create a company by reading the initial company and employee information from PenSoft Payroll:

- Click File.
- Click New Company.
- Select "Create a new company file but read the initial company and employee information from an existing PenSoft Payroll company."
- Click Next.
- Highlight the desired company from the PenSoft Payroll company list.
- Click Next.

### Standalone Product

To create a company from scratch:

- Click File.
- Click New Company.
- Select "Create a new company file and enter the initial company and employee information from scratch."
- Click Next.

### Create a Company

**Company Name:** Each company must have a name. It is limited to 25 characters.

**File Name:** Enter the file name. The default name is based on the company name, but it can be changed.

**Administrator Password:** A password must be entered and confirmed for the administrator.

**Database Initialization:** The required databases will automatically be created and initialized.

## Company Setup

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To access Company Setup:

- Click Company on the toolbar. *OR...*
- Click Setup on the menu.
- Click Company.

**Address:** Enter the full address. Adding the state to the Address section will make the appropriate New Hire Report available.

**Identification:** Enter the company description, FEIN, NAICS, DUNS, EEO, and state identification information.

**Contact:** Enter the company contact information.

**Signatory:** Enter the person who signs the forms and reports. If the company is linked to a PenSoft database, changes to the signatory will be applied to PenSoft Payroll.

**Departments:** Add department names if desired.

**Locations:** Add locations if desired.

## Company Settings

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To access Company Settings:

- Click Company on the toolbar.
- Click Settings on the Company Setup window. *OR...*
- Click Settings on the toolbar.

**Paygrades & Steps:** Can be used in conjunction with incomes and compensation to automatically change the rate of pay for employees and contractors.

**Incomes & Compensations:** Enter the incomes assigned to the employees and contractors.

**Benefit Plans:** Add any benefit plans. Titles are limited to 30 characters.

**Personnel Groups:** Check the box to use personnel groups.

**Custom Fields:** Eight custom data fields can be set for each applicant, employee, or contractor.

**Evaluation Ratings:** Add, modify, or delete evaluation ratings.

**Training Courses:** Add any training courses. Limited to 30 characters.

**Hiring Checklist:** Add any desired items to the checklist. User defined items can be modified.

**Preferences:** Complete employee number, formatting, and auto-generated notes preferences.

**Optional Setup Tabs:** Select the tabs to be visible when viewing the personnel setup.

# PERSONNEL

Data can be maintained and reported on:

- Applicants
- Employees
- Contractors
- Terminated Personnel

Personnel setup varies slightly for each type, but much of the data is the same or similar.

To view personnel:

- Click Applicants, Employees, Contractors, or Terminated on the toolbar.

To add new personnel:

- Click Add in the appropriate personnel type window.

**NOTE:** Not all information is applicable to each personnel type and will not be available in the setup.

**NOTE:** Income, Benefits, Job, OSHA, and Evaluations are not normally visible for applicants.

**NOTE:** References and Previous Employers normally visible only for applicants.

**NOTE:** Benefits, Job, EEO Data, and Evaluations are not normally visible for contractors.

**Setup Information:** Add a photograph, title, name, employee number, and social security number. Check “Is a Supervisor” if applicable.

**Employment:** Add or modify events to track employment status and history.

**Income:** Add, update, or edit an income to track and display an employee’s current income.

**Benefits:** Benefits are always displayed for all employees regardless of eligibility or enrollment.

**Address:** Complete or edit the address information.

**Personal:** Complete or edit the personal information.

**Job:** Complete or edit the job information.

**Dependents:** Add or modify dependent information.

**References:** Add or modify references for the applicant. An unlimited number of references can be added.

**Previous Employers:** Add or modify previous employers for the applicant. An unlimited number can be added

**Employment Verification:** Fields reflect the required data fields on the Federal Form I-9.

**EEO Data:** Used to complete the Form EEO-1 and Forms VETS-100. Ethnicity and job category cannot be changed.

**OSHA:** Add, modify, or delete an OSHA incident. An unlimited number of incidents can be added.

**Evaluations:** Add, modify, or delete personnel evaluations. An unlimited number of evaluations can be added.

**Education:** Add, modify, or delete education items. An unlimited number of

education items can be added.

**Training:** Add, modify, or delete training items. An unlimited number of training items can be added. Recurring training items can be entered more than once. Completion and expiration dates can be tracked.

**Custom:** Data can be stored in eight custom fields. The title and type of each field is defined in the company settings.

**Assets:** Assign company assets to personnel. An unlimited number of assets can be added.

**Notes:** Add, modify, or delete notes. An unlimited number of notes can be added.

**Attachments:** Store and retrieve personnel files with attachments. An unlimited number can be added.

## **Hiring Checklist**

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The hiring checklist is a customizable list of things to do when personnel is hired. It can be modified in the company settings. When an item has been completed it can be checked and the date completed entered.

## **Terminated Personnel**

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Terminated personnel are employees or contractors who have been terminated. All terminated personnel are in the list by default.

# **REPORTS**

PenSoft Employee Tracker can generate an extensive set of reports. There are four categories of reports:

- Personnel Reports
- Management Reports
- Government Reports
- Other Reports

To view Reports:

- Click Reports on the toolbar.

## **Report Layout**

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Report layout includes the paper size, orientation, margins, fonts, and other options used when a report is printed.

## **Personnel Reports**

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Personnel reports list setup information about an applicant, employee, or contractor. Three predefined reports and six user defined reports are included.

## **Management Reports**

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Management reports list specific information about a list of applicants, employees, or contractors. Typical uses for management reports are to list employees' names and addresses, telephone numbers, and birth dates.

## **Government Reports**

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Government reports include a variety of common forms required by state and federal agencies. PenSoft Employee Tracker can produce the following forms:

- IRS Form W-4, Employee's Withholding Allowance Certificate
- IRS Form W-5, Earned Income Credit Advance Payment Certificate
- DHS Form I-9, Employment Eligibility Verification
- State New Hire Report
- OSHA Form 300/300A, Log and Summary of Work-Related Injuries and Illness Incident Report
- Form EEO-1, Employer Information Report
- DOL Form VETS-100 Federal Contractor Report on Veterans' Employment

## **Other Reports**

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Other Reports include:

- Company Overview Report
- Suspense Report
- Notes Report by Individual
- Notes Report by Category
- Training Reports
- Benefits Report
- Hiring Checklist Report
- Labels

## **DOCUMENTS**

Employee Tracker can generate common documents customized for a specific applicant, employee, or contractor. Documents are displayed by selecting a template and then selecting the applicant, employee, or contractor.

Employee Tracker will then merge the appropriate data from the selected applicant, employee, or contractor into the template and open the resulting document for viewing and printing.

## **BACK UP DATA**

Backing up data is one of the most important steps. To protect against the loss of data, make regular backups independent of the normal system or server backups being performed by a systems administrator. A backup should be completed after every payroll.

### **To back up data:**

- Click Backup on the toolbar. The Data Backup screen will appear.
- Select the appropriate path for the backup file.
- Enter a backup file name in the backup menu file dialog box.
- Click OK.

## LINK TO PENSOFT PAYROLL

To access Link to PenSoft Payroll:

- Click Utilities on the menu.
- Click PenSoft Payroll Link

This utility is of no use if PenSoft Payroll is not installed.

Data in either PenSoft Payroll or PenSoft Employee Tracker will be changed by using this utility. It is highly recommended both sets of data be backed up prior to using the link utility.

## CONTACT PROGRAM SUPPORT

Unlimited free Program Support is available for registered and trial users of PenSoft Employee Tracker.

**Select one of our convenient contact methods:**

- Phone: 757-873-1199
- Fax: 757-873-1733
- E-Mail: [support@pensoft.com](mailto:support@pensoft.com)
- Knowledge Database: [www.pensoft.com/support/support.aspx](http://www.pensoft.com/support/support.aspx)

Monday-Thursday: 9:00 am to 6:00 pm Eastern Time

Friday: 9:00 am to 5:00 pm Eastern Time



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