

GMS Connect

Client User Guide

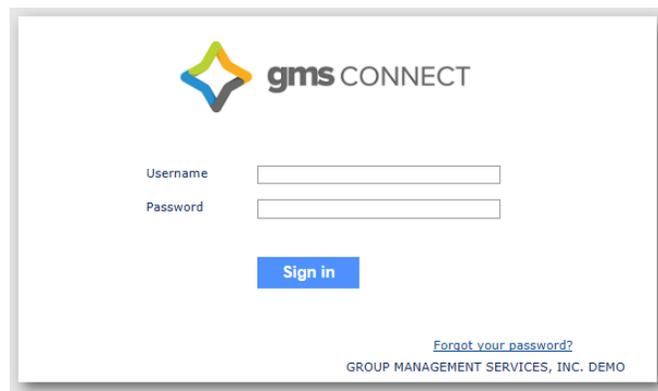
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Welcome to GMS Connect! This workbook is meant to be a guide to the new GMS Connect platform. The instructions coupled with screen-shots will help you to get comfortable in the GMS Connect system, but it is not comprehensive. Should you have any questions or need assistance, you are always welcome to reach out to your Payroll Specialist or Account Manager.

Getting Started

Navigate to <https://gms.prismhr.com/gms> and enter your credentials:



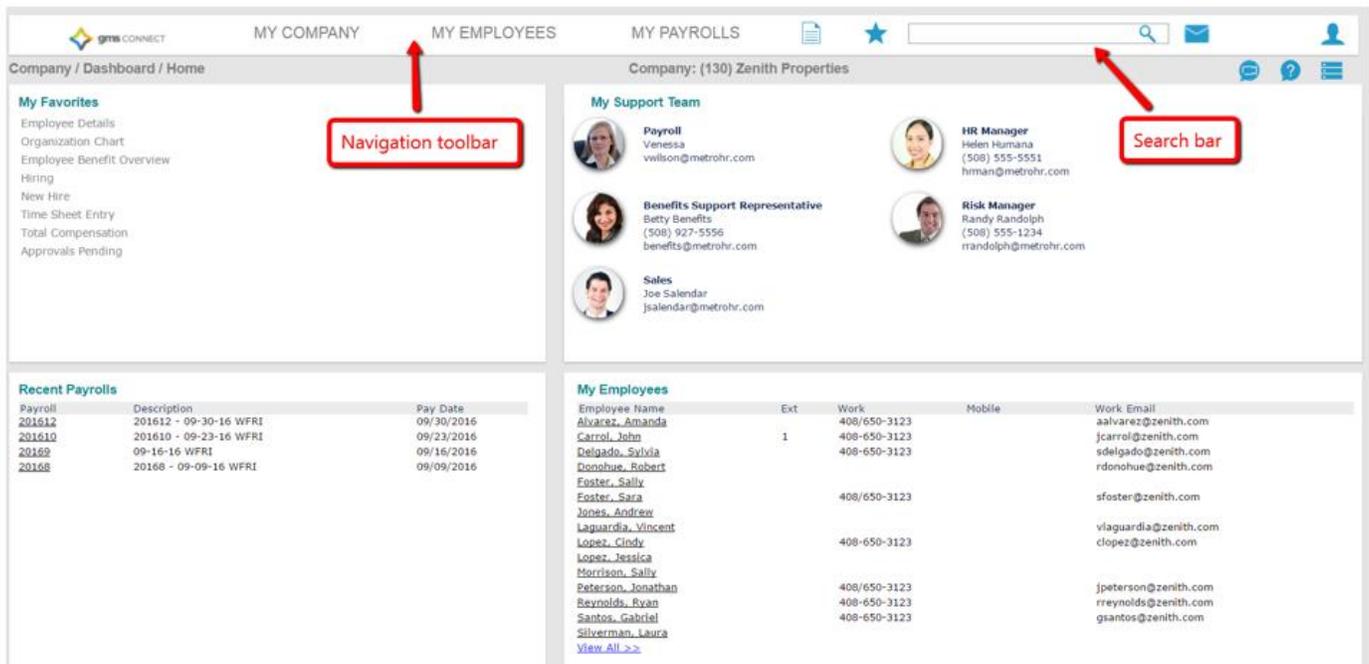
Navigation

Upon logging in, you'll find the navigation toolbar across the top of the home screen.

"My Company" is where you'll find all the information that pertains to your organization and allows you to manage your company's basic structure.

"My Employees" allows you to maintain your employees' HR records.

"My Payrolls" allows you to enter payroll, view employee payroll history and invoices as well as manage voluntary deductions for your employees.

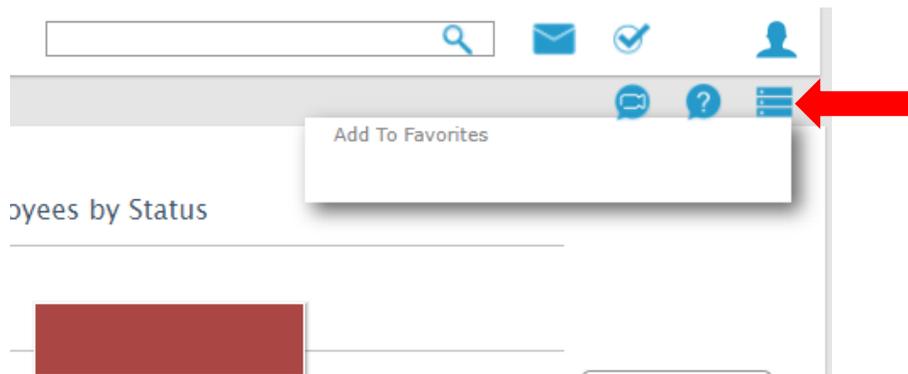


Payroll	Description	Pay Date
201612	201612 - 09-30-16 WFRI	09/30/2016
201610	201610 - 09-23-16 WFRI	09/23/2016
201609	09-16-16 WFRI	09/16/2016
201608	20168 - 09-09-16 WFRI	09/09/2016

Employee Name	Ext	Work	Mobile	Work Email
Alvarez, Amanda		408-650-3123		aalvarez@zenith.com
Carroll, John	1	408-650-3123		jcarroll@zenith.com
Delgado, Sylvia		408-650-3123		sdelgado@zenith.com
Donohue, Robert				rdonohue@zenith.com
Foster, Sally				sfoster@zenith.com
Foster, Sara		408/650-3123		sfoster@zenith.com
Jones, Andrew				
Laguardia, Vincent				vlaguardia@zenith.com
Lopez, Cindy		408-650-3123		clopez@zenith.com
Lopez, Jessica				
Morrison, Sally				
Peterson, Jonathan		408/650-3123		jpeter@zenith.com
Reynolds, Ryan		408-650-3123		rreynolds@zenith.com
Santos, Gabriel		408-650-3123		gsantos@zenith.com
Silverman, Laura				

The paper icon gives you access to various reports, and the star icon allows you to access your favorites from any screen. The search bar allows you to search for employees, reports, and menus all in one spot. When searching for an employee, enter "e:" before the employee name to narrow the results only to employee names.

Your account will have a set list of favorites preloaded for you, but you can edit these at any time by navigating to the screen you would like to add/remove from favorites, clicking on the "Action Menu," and selecting "add to favorites" or "remove from favorites."



The "question mark" icon is a valuable tool that provides help if you get stuck, and any time the video icon is displayed there are helpful how-to videos as well.

Employee Details

You can click on an employee's name to access the Employee Details screen:

HR / Change / Employee Details Client: (02615) NERVOUS DOG MONTROSE

Ashanti Allison Name | Personal | Address | Work | Pay | Tax | Deposit | Skills & Education | Property | Other

Employee

Name & Contact

Last Name	<input type="text" value="ALLISON"/>	Work Phone	<input type="text"/>
First Name	<input type="text" value="ASHANTI"/>	Work Email	<input type="text"/>
Middle Name	<input type="text"/>	ESS User Name	297-90-3494
Nickname	<input type="text"/>		



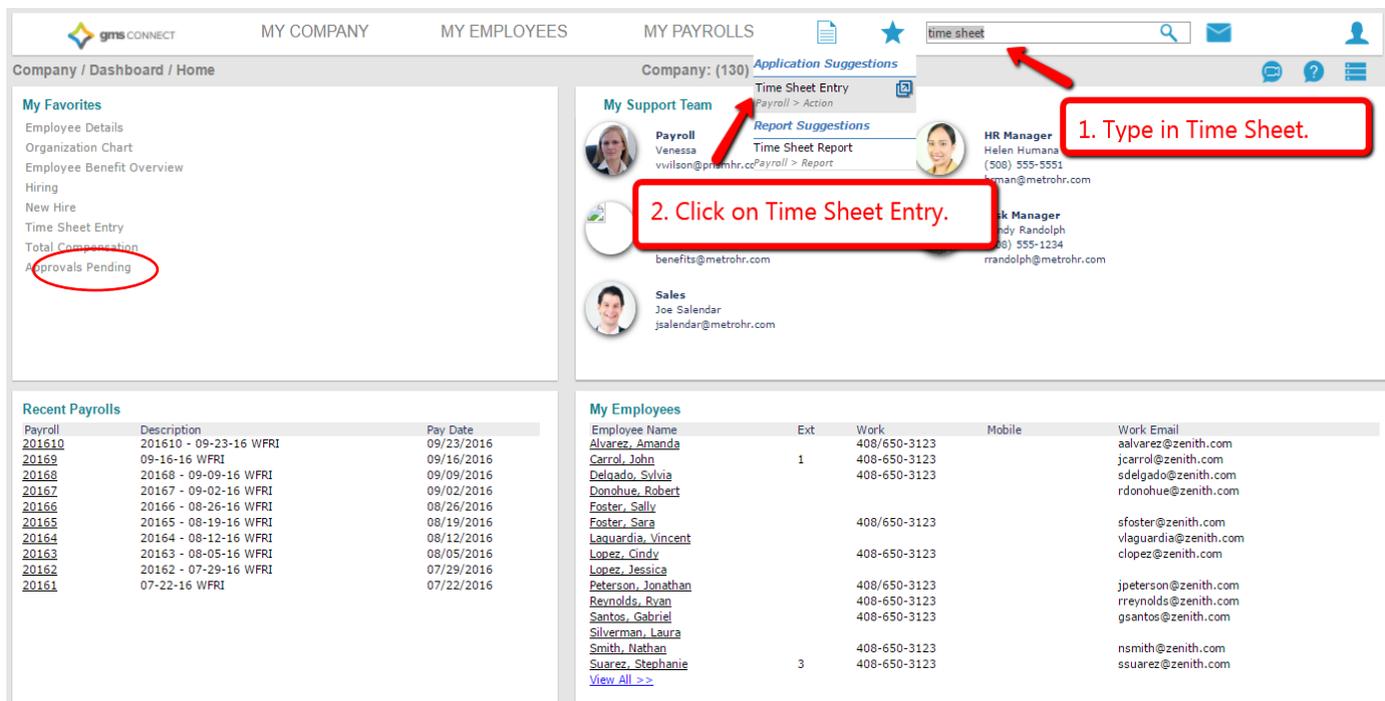
Employment

Employment Status	ACTIVE	<input type="button" value="Copy"/>	Employer	GROUP MANAGEMENT SERVICES
Status Date	12/01/2016		Employer Start Date	12/01/2016
Employment Type	FT	<input type="button" value="Copy"/>	Last Hire Date	12/01/2016
Type Date	12/01/2016		Original Hire Date	12/01/2016
Position	OH9083 RESTAURANT/FAST FOOD	<input type="button" value="Copy"/>		
Position EEO Code	LABOR			
FLSA Exempt	<input type="checkbox"/>			
W/C Class	OH.9083			Works for 3 other company(s).

This screen allows you to view and update employees' personal data, including taxes, direct deposit, etc.

Payroll

You can utilize the search bar to navigate to Time Sheet Entry, or you may select it in your "Favorites."



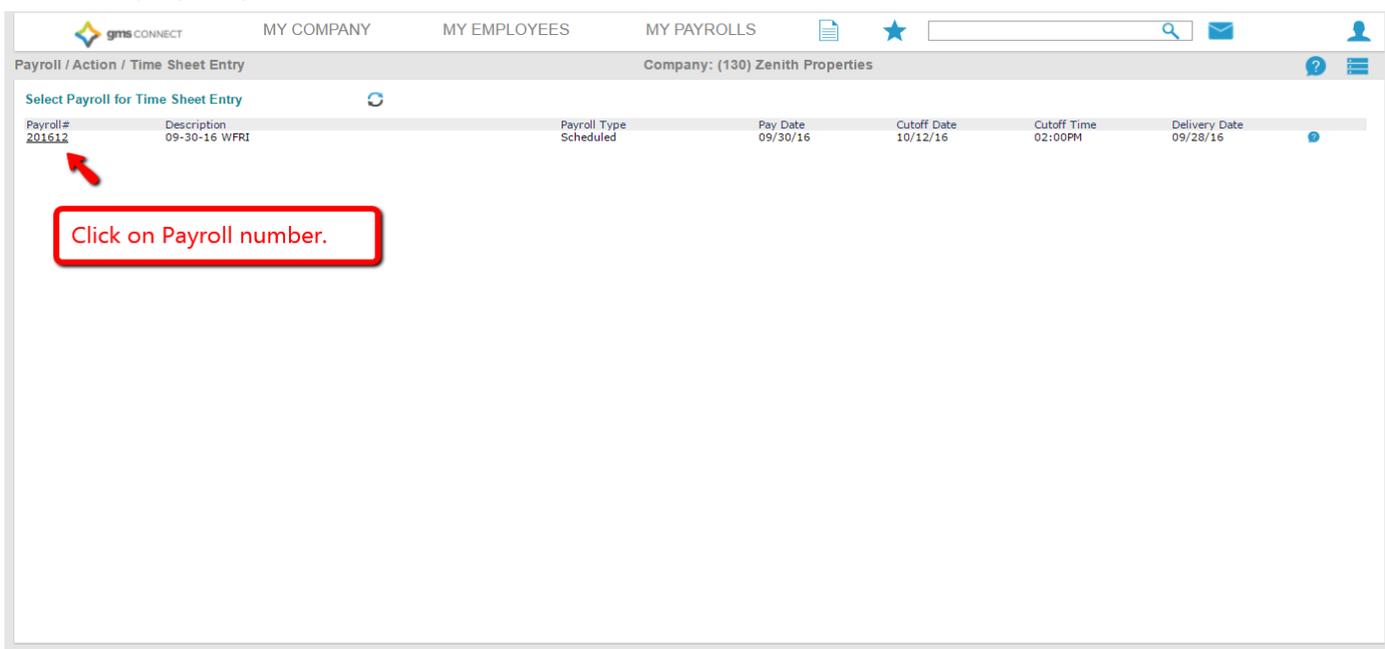
The screenshot shows the gms CONNECT dashboard with the following elements:

- Navigation Bar:** MY COMPANY, MY EMPLOYEES, MY PAYROLLS, and a search bar containing "time sheet".
- My Favorites:** A list of navigation options including Employee Details, Organization Chart, Employee Benefit Overview, Hiring, New Hire, Time Sheet Entry (circled in red), Total Compensation, and Approvals Pending.
- My Support Team:** A section with profile cards for Venessa (Payroll), Helen Humana (HR Manager), Andy Randolph (Risk Manager), and Joe Salendar (Sales). A red box highlights "Time Sheet Entry" with the instruction "2. Click on Time Sheet Entry."
- Recent Payrolls:** A table listing payroll records with columns for Payroll, Description, and Pay Date.
- My Employees:** A table listing employee details with columns for Employee Name, Ext, Work, Mobile, and Work Email.

Red annotations include:

- A red box around "Time Sheet Entry" in the My Favorites list.
- A red box around "Time Sheet Entry" in the My Support Team section with the text "2. Click on Time Sheet Entry."
- A red box around the search bar containing "time sheet" with the text "1. Type in Time Sheet."

Select the payroll you would like to edit:



The screenshot shows the "Select Payroll for Time Sheet Entry" screen with the following table:

Payroll#	Description	Payroll Type	Pay Date	Cutoff Date	Cutoff Time	Delivery Date
201612	09-30-16 WFRI	Scheduled	09/30/16	10/12/16	02:00PM	09/28/16

A red arrow points to the payroll number "201612" in the first row, with a red box containing the instruction "Click on Payroll number."

Time Sheet

You can to the following key to assist you in navigating your timesheet:

Icon Key:

-  Import pay data from a file
-  Statistics – Compares the current payroll to prior payrolls
-  Timesheet entry detail report
-  Search for a specific employee name or ID number
-  Filter the timesheet to display by department, location, etc.
-  Use this function to hide columns

Inside your timesheet, salaried employees' data has been prepopulated for you. You may make edits to each column the same way you did before. If you need a pay code not listed, you may click on the Employee's name to pull up detailed time entry:

 CLIENT HR PAYROLL
Client: (00642) GMS DEMO

Payroll Weekly
Start 04/02/2018 End 04/08/2018 Pay Date 04/13/2018

Closed in 295(d):06(h):11(m)

Employee	Name	Pay rate	Salary	REG_HRS	O/T_HRS	O/T_2	MILES	Detail Hours	Detail Units	Detail Dollars	Total Hours	Total Units	Total Dollars	Gross Pay	O/E	O/D	L/R	PTO
<input type="checkbox"/>	A41753 Footer, Frank	28.84	●	24.00	8.00						32.00			1,038.47	●			
<input type="checkbox"/>	R94657 Rider, Timothy G	40.00		0.00				40.00			40.00			1,800.00		●		
<input type="checkbox"/>	U02915 Test, Email	10.00		0.00	8.00						8.00			120.00				
<input type="checkbox"/>	H84488 Test, Employee	10.00		0.00				0.00		1,000.00			1,000.00	1,000.00				
<input type="checkbox"/>	L94657 Thomas, Abbie S	9.25		0.00														
<input type="checkbox"/>	H94657 Wheat, Alexandria K	8.55		0.00														
<input type="checkbox"/>	Y91127 Willard, Adam	36.05	●	0.00														
<input type="checkbox"/>	U45859 Williams, James	50.00	●	0.00														
<input type="checkbox"/>	A94657 Wilson, Jennifer	11.00		0.00				0.00		500.00			500.00	500.00				
Totals for displayed employees (To do only)				24.00	16.00	0.00	0.00	40.00	0.00	1,500.00	80.00	0.00	1,500.00	4,458.47				

Return
Finalize
Finalize Page

[Audit Listing](#)

Payroll Statistics



Columns may be selected and edited, and new ones can be added on this screen. You may also allocate hours by project, location, etc. on this screen. Totals are then displayed at the bottom:

Detail Time Sheet Entry Pivot By: Employee ▼

Employee ◇ Footer Frank

Entry:

Charge Date:

Pay Code:

Hours Paid:

Position Code: Hotel/rest. E.e.'s

Hours Worked:

Location: Test 105

Project:

Pay Rate:

Suppress Allocation

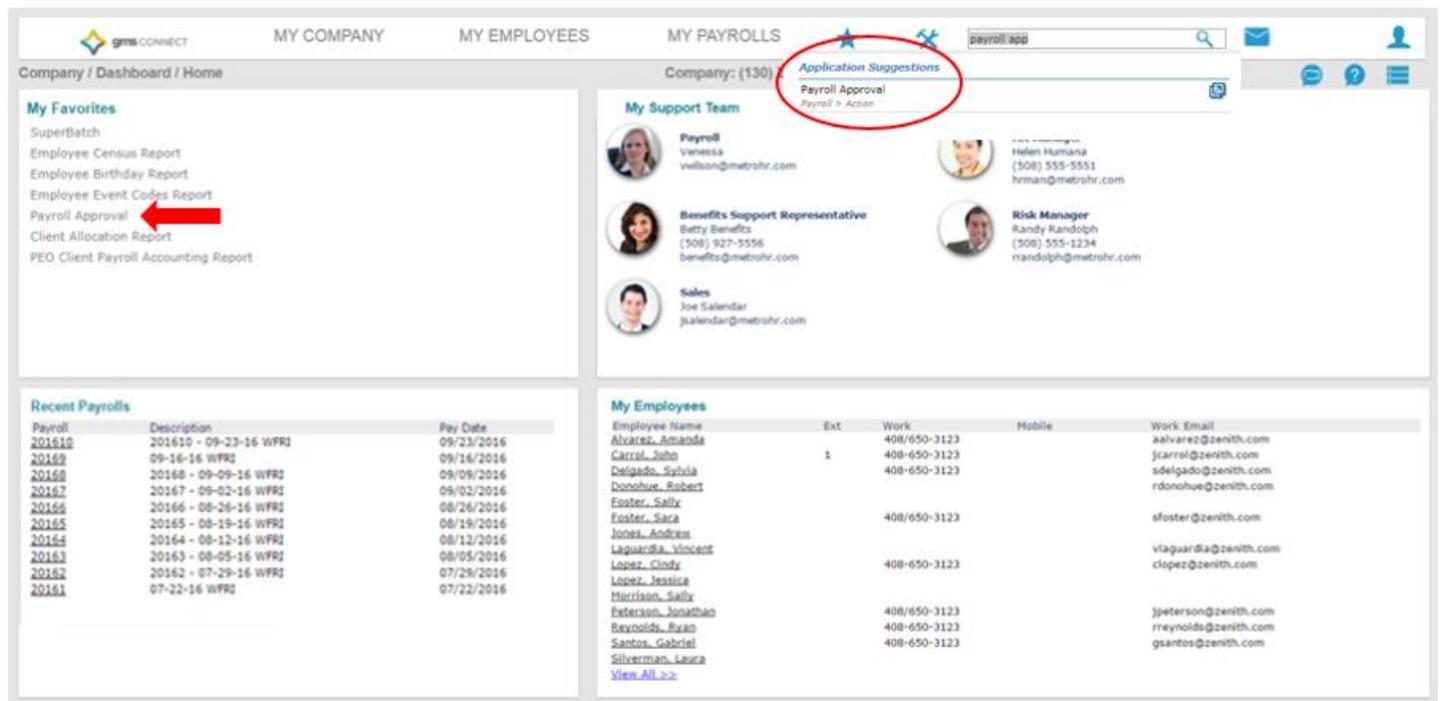
Save Return

	1	2
	04/08/18	04/08/18
REG	O/T	
24.00	8.00	
OH9058	OH9058	
24.00	8.00	
105	105	
28.8463	43.2695	
692.31	346.16	

Hours Paid	Hours \$	Flat \$	Units	Units \$	Total \$
32.00	1,038.47	0.00	0.00	0.00	1,038.47

Approving Payroll

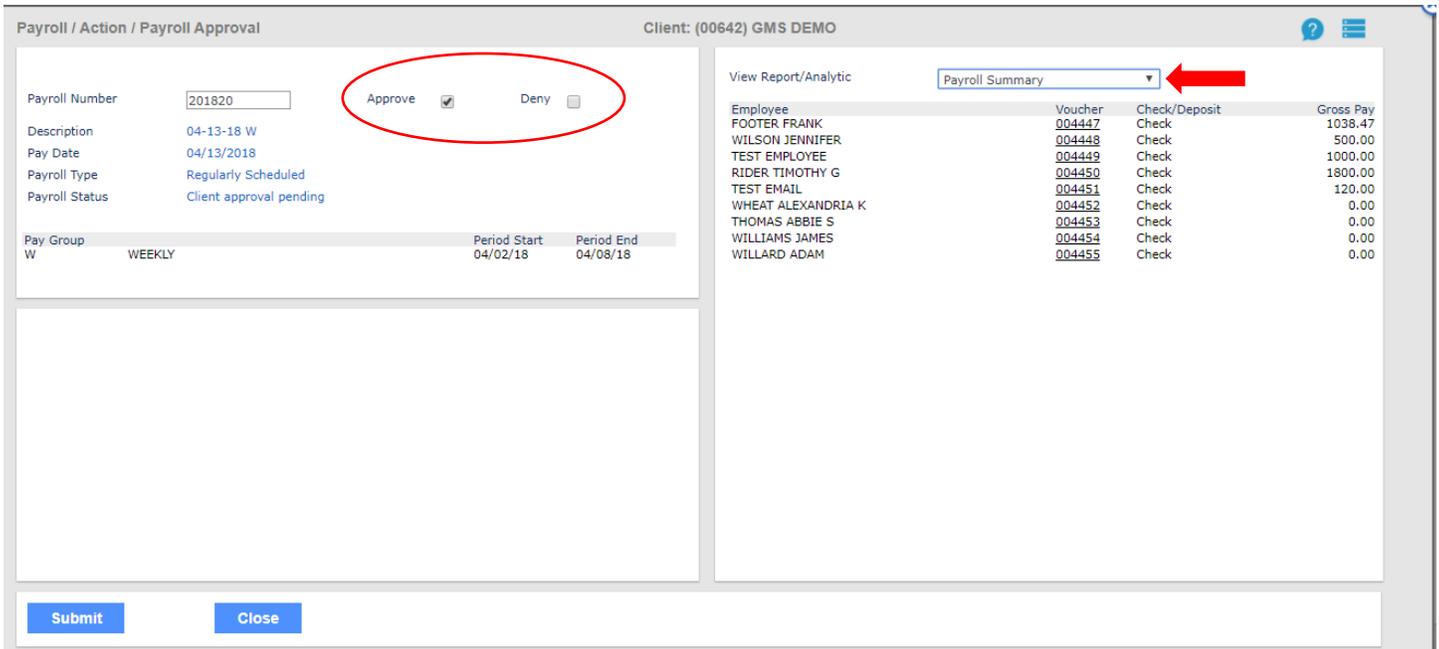
When you're happy with the way the time sheet looks, you will hit "finalize" and the batch will be sent to GMS for processing. When your preview is available, you will receive an email notification. Navigate to "Payroll Approval" on your "Favorites" menu or by using the search bar:



The screenshot shows the GMS CONNECT dashboard with the following elements:

- Navigation:** MY COMPANY, MY EMPLOYEES, MY PAYROLLS, payroll app
- Search:** Application Suggestions (circled in red), Payroll Approval, Payroll > Action
- My Favorites:** Superbatch, Employee Census Report, Employee Birthday Report, Employee Event Codes Report, Payroll Approval (highlighted with a red arrow), Client Allocation Report, PEO Client Payroll Accounting Report
- My Support Team:** Payroll (Venessa), Benefits Support Representative (Betty), Sales (Joe), HR Manager (Helen), Risk Manager (Randy)
- Recent Payrolls:** Table with columns: Payroll, Description, Pay Date
- My Employees:** Table with columns: Employee Name, Ext, Work, Mobile, Work Email

On the "Payroll Approval" screen, you may review all of your reports by using the drop-down menu. You can then deny the batch if you need to make changes, or approve it. Click "Submit" when you're done and we will finalize your payroll.



Payroll / Action / Payroll Approval Client: (00642) GMS DEMO

Payroll Number: 201820

Description: 04-13-18 W

Pay Date: 04/13/2018

Payroll Type: Regularly Scheduled

Payroll Status: Client approval pending

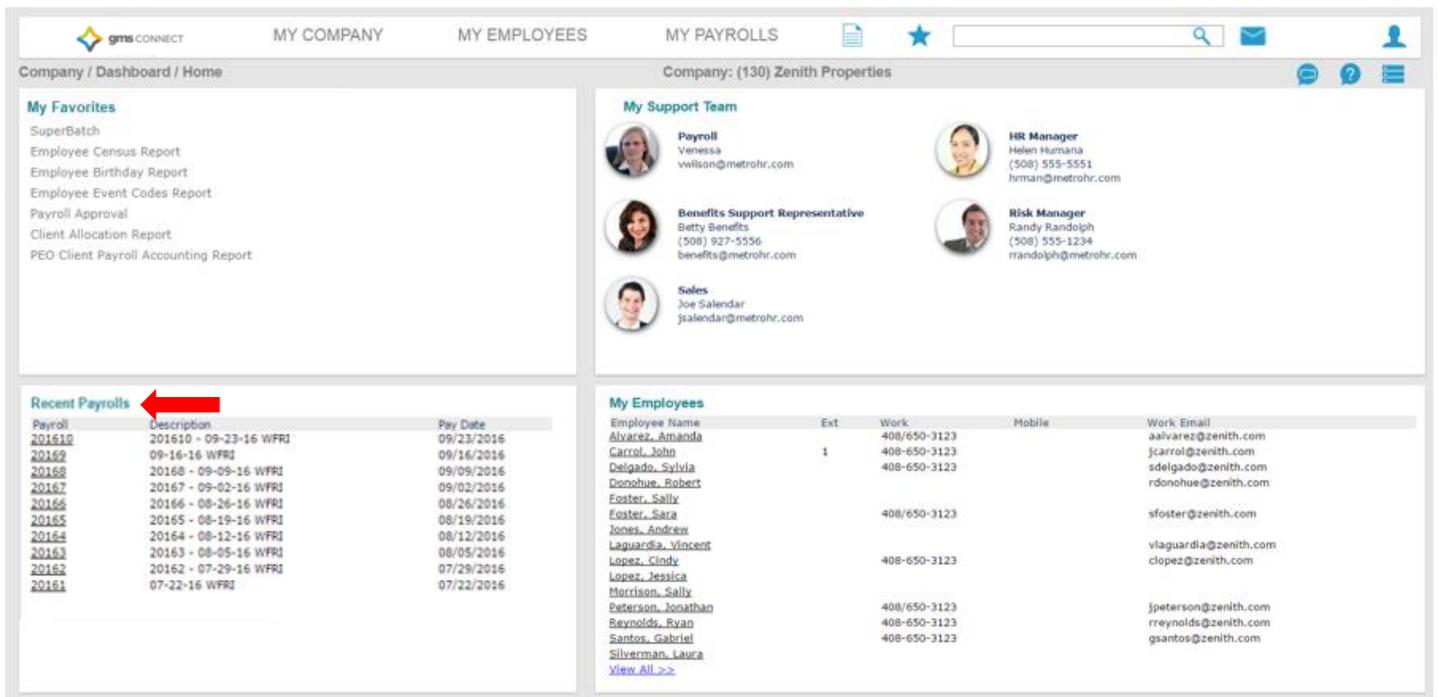
Pay Group: W WEEKLY Period Start: 04/02/18 Period End: 04/08/18

View Report/Analytic: Payroll Summary

Employee	Voucher	Check/Deposit	Gross Pay
FOOTER FRANK	004447	Check	1038.47
WILSON JENNIFER	004448	Check	500.00
TEST EMPLOYEE	004449	Check	1000.00
RIDER TIMOTHY G	004450	Check	1800.00
TEST EMAIL	004451	Check	120.00
WHEAT ALEXANDRIA K	004452	Check	0.00
THOMAS ABBIE S	004453	Check	0.00
WILLIAMS JAMES	004454	Check	0.00
WILLARD ADAM	004455	Check	0.00

Buttons: Submit, Close

Once the payroll has been completed, your final reports are available under "Recent Payrolls":



Company / Dashboard / Home Company: (130) Zenith Properties

My Favorites

- SuperBatch
- Employee Census Report
- Employee Birthday Report
- Employee Event Codes Report
- Payroll Approval
- Client Allocation Report
- PEO Client Payroll Accounting Report

My Support Team

- Payroll:** Venessa Wilson (508) 555-5551
- HR Manager:** Helen Humana (508) 555-5551
- Benefits Support Representative:** Betty Benefits (508) 927-5556
- Risk Manager:** Randy Randolph (508) 555-1234
- Sales:** Joe Salendar

Recent Payrolls

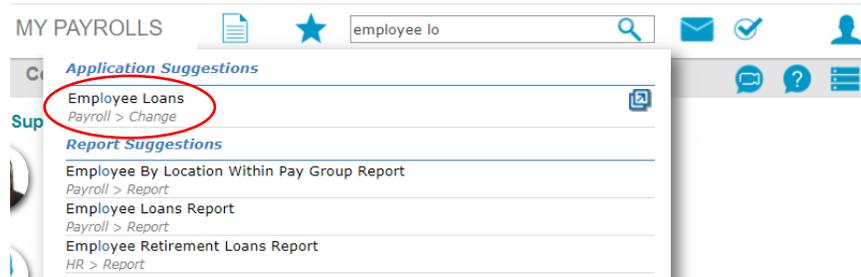
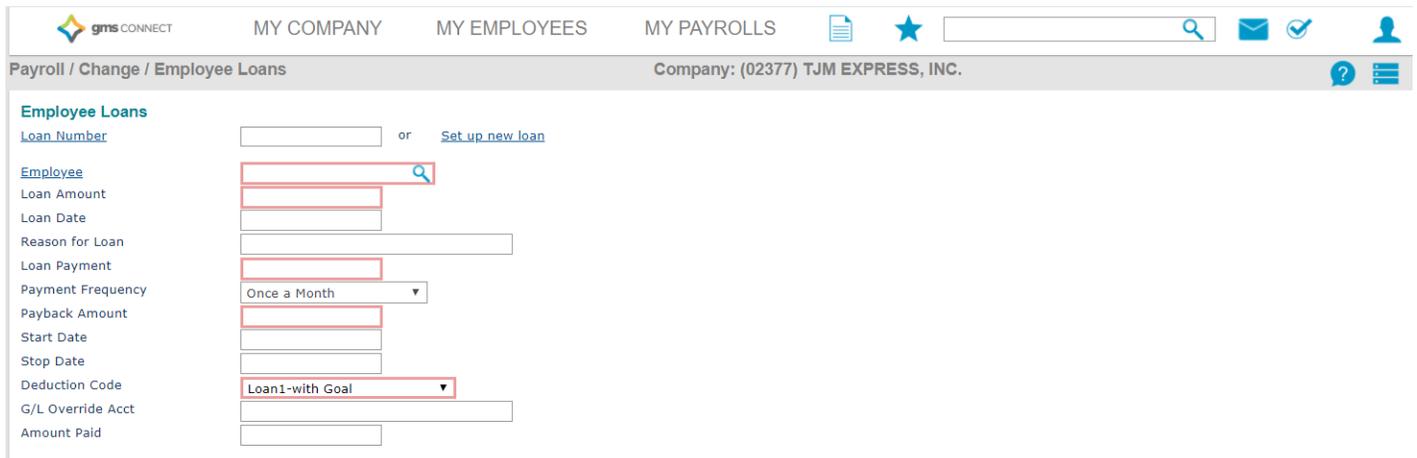
Payroll	Description	Pay Date
201610	201610 - 09-23-16 WFRJ	09/23/2016
20162	09-16-16 WFRJ	09/16/2016
20168	20168 - 09-09-16 WFRJ	09/09/2016
20167	20167 - 09-02-16 WFRJ	09/02/2016
20166	20166 - 08-26-16 WFRJ	08/26/2016
20165	20165 - 08-19-16 WFRJ	08/19/2016
20164	20164 - 08-12-16 WFRJ	08/12/2016
20163	20163 - 08-05-16 WFRJ	08/05/2016
20162	20162 - 07-29-16 WFRJ	07/29/2016
20161	07-22-16 WFRJ	07/22/2016

My Employees

Employee Name	Ext	Work	Mobile	Work Email
Alvarez, Amanda		408/650-3123		aalvarez@zenith.com
Carroll, John	1	408-650-3123		jcarrrol@zenith.com
Delgado, Sylvia		408-650-3123		sdelgado@zenith.com
Donohue, Robert				rdoehue@zenith.com
Foster, Sally				sfoster@zenith.com
Foster, Sara		408/650-3123		
Jones, Andrew				
Laguardia, Vincent				vlaguardia@zenith.com
Lopez, Cindy		408-650-3123		clopez@zenith.com
Lopez, Jessica				
Morrison, Sally				
Peterson, Jonathan		408/650-3123		jpeterson@zenith.com
Reynolds, Ryan		408-650-3123		rreynolds@zenith.com
Santos, Gabriel		408-650-3123		gsantos@zenith.com
Silverman, Laura				

Employee Loans

In GMS Connect, you can establish employee loan information, track the payment of the loan, and view loan payments that were deducted from employee paychecks. Use the search bar to bring up the “Employee Loan” screen:

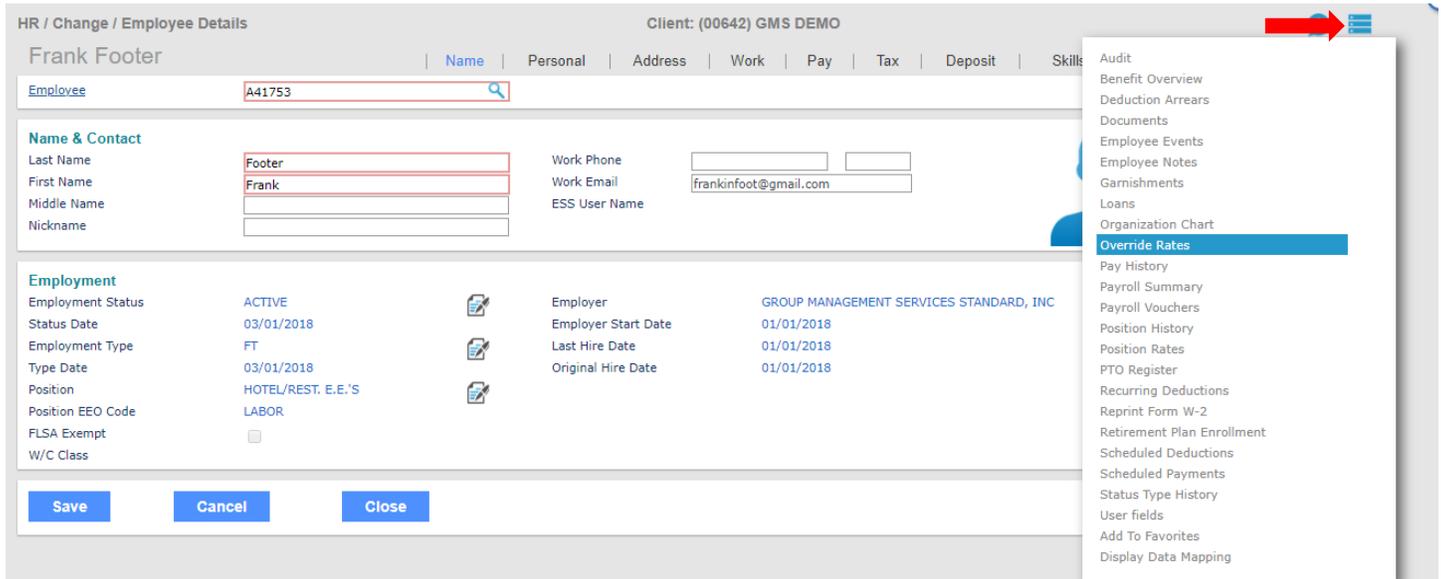
A screenshot of the 'Employee Loans' form in GMS Connect. The form is titled 'Employee Loans' and is located under the 'Payroll / Change / Employee Loans' section. The company name is '(02377) TJM EXPRESS, INC.'. The form contains the following fields:

- Loan Number: or [Set up new loan](#)
- Employee: (with a search icon)
- Loan Amount:
- Loan Date:
- Reason for Loan:
- Loan Payment:
- Payment Frequency:
- Payback Amount:
- Start Date:
- Stop Date:
- Deduction Code:
- G/L Override Acct:
- Amount Paid:

1. Select an existing *Loan Number* or click **Set up a new loan**.
2. Enter the *Employee* by clicking the “Employee” field label to open the search window.
3. Enter the *Loan Amount* granted to the employee.
4. Enter the *Loan Date* on which this loan was granted.
5. Enter the *Reason for Loan*.
6. Enter the *Loan Payment* to automatically deduct from each paycheck to repay the loan.
7. Select the *Payment Frequency* for the payroll deduction.
8. Enter the *Payback Amount* required to consider the loan paid in full, which is the amount of this loan plus interest.
9. Enter the *Start Date* on which payroll deductions will begin to pay back the loan.
10. Enter the *Stop Date* on which payroll deductions will cease. *If you do not enter a Stop Date, GMS Connect continues to deduct loan payments until the Payback Amount has been satisfied.*
11. Enter the *Deduction Code* used for the employee loan.
12. The *Amount Paid* field displays the amount that the employee has paid back on this loan to date. If you are entering information a loan where the employee has already made some payments, enter the total paid to date in this field.

Override Rates

In the Employee Override Rates form you can define a different pay rate for each pay code used to pay the employee. For all other pay codes, the system defaults to the employee's standard pay rate. Access this form from the Employee Details Action menu:



HR / Change / Employee Details Client: (00642) GMS DEMO

Frank Footer | Name | Personal | Address | Work | Pay | Tax | Deposit | Skills

Employee ID: A41753

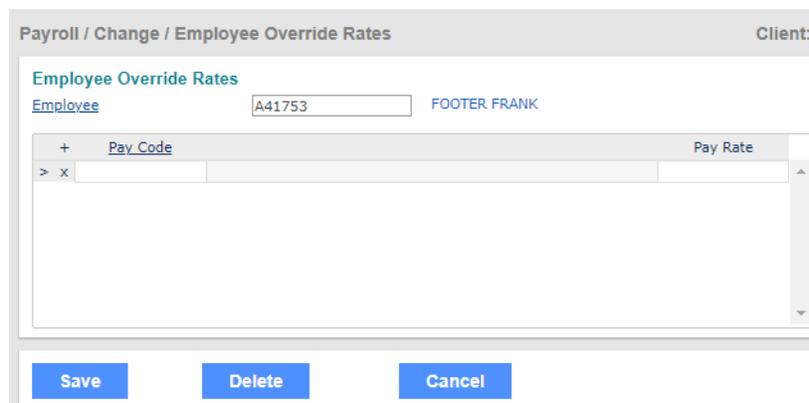
Name & Contact

Last Name: Footer
 First Name: Frank
 Middle Name:
 Nickname:
 Work Phone:
 Work Email: frankinfoot@gmail.com
 ESS User Name:
 Save Cancel Close

Employment

Employment Status: ACTIVE
 Status Date: 03/01/2018
 Employment Type: FT
 Type Date: 03/01/2018
 Position: HOTEL/REST. E.E.'S
 Position EEO Code: LABOR
 FLSA Exempt:
 W/C Class:
 Employer: GROUP MANAGEMENT SERVICES STANDARD, INC
 Employer Start Date: 01/01/2018
 Last Hire Date: 01/01/2018
 Original Hire Date: 01/01/2018
 Audit
 Benefit Overview
 Deduction Arrears
 Documents
 Employee Events
 Employee Notes
 Garnishments
 Loans
 Organization Chart
Override Rates
 Pay History
 Payroll Summary
 Payroll Vouchers
 Position History
 Position Rates
 PTO Register
 Recurring Deductions
 Reprint Form W-2
 Retirement Plan Enrollment
 Scheduled Deductions
 Scheduled Payments
 Status Type History
 User fields
 Add To Favorites
 Display Data Mapping

For example, an employee regularly works as a server but occasionally tends bar. Because the hours worked in each position vary from one week to the next, you should have pay codes for each position. The pay voucher would display the amount earned as a server and as a bartender.



Payroll / Change / Employee Override Rates Client: (

Employee Override Rates

Employee ID: A41753 Name: FOOTER FRANK

	Pay Code	Pay Rate
> x		

Save Delete Cancel

1. The *Employee ID* defaults from the Employee Details form.
2. For each pay code:
 - a. Enter the *Pay Code* that represents the pay to override.
 - b. Enter the *Pay Rate* for that pay code.
3. Click **Save**.

Scheduled Deductions

A Scheduled Deduction establishes either a one-time or ongoing deduction for an employee.

HR / Change / Employee Details Client: (00642) GMS DEMO

Frank Footer Name | Personal | Address | Work | Pay | Tax | Deposit | Skills

Employee

Name & Contact

Last Name: Work Phone:

First Name: Work Email:

Middle Name: ESS User Name:

Nickname:

Employment

Employment Status: ACTIVE Employer: GROUP MANAGEMENT SERVICES STANDARD, INC

Status Date: 03/01/2018 Employer Start Date: 01/01/2018

Employment Type: FT Last Hire Date: 01/01/2018

Type Date: 03/01/2018 Original Hire Date: 01/01/2018

Position: HOTEL/REST. E.E.'S

Position EEO Code: LABOR

FLSA Exempt:

W/C Class:

- Audit
- Benefit Overview
- Deduction Arrears
- Documents
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- Position Rates
- PTO Register
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- Reprint Form W-2
- Retirement Plan Enrollment
- Scheduled Deductions**
- Scheduled Payments
- Status Type History
- User fields
- Add To Favorites
- Display Data Mapping

Payroll / Change / Scheduled Deductions Client: (00642) GMS DEMO

Scheduled Deductions

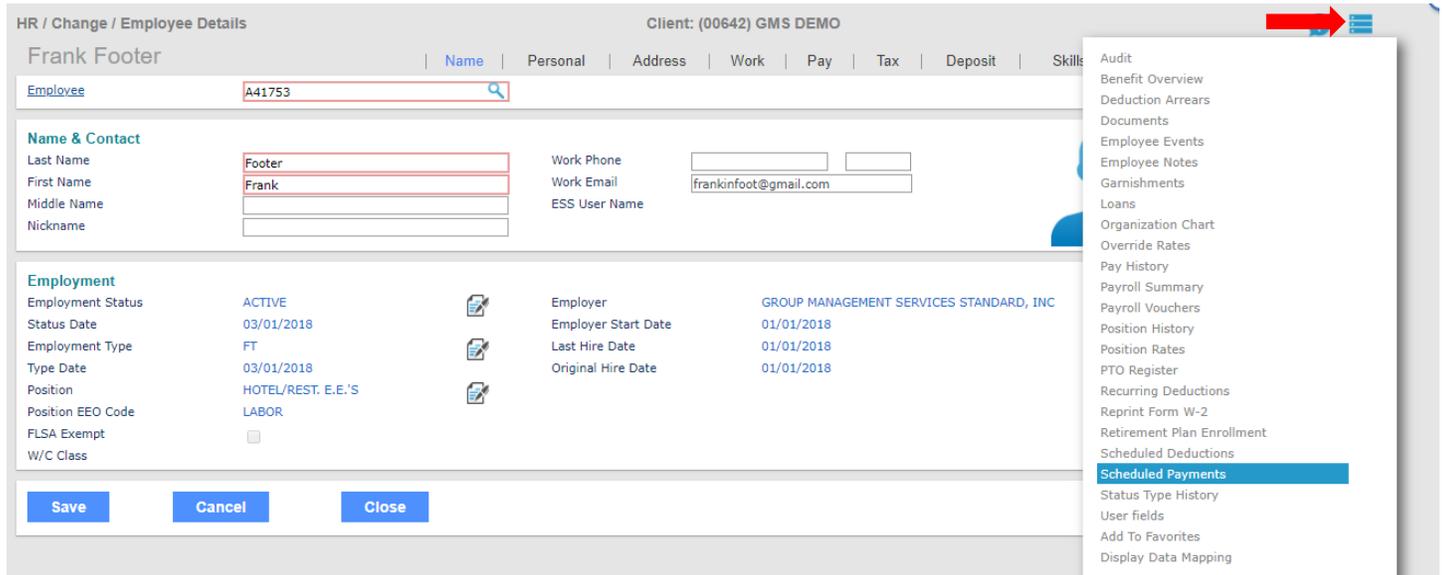
Employee Frank Footer

	Deduction Code	Check Stub Description	Status	Amount	Start Date	Stop Date
> x	<input type="text"/>		--Select--			

1. Enter the *Deduction Code*.
2. Select the deduction *Status* to specify when the deduction occurs:
 - **One Time**: The system takes the deduction once during the specified pay range and then sets it to **Inactive**.
 - **Active**: The system takes the deduction each pay period during the date range.
 - **Inactive**: The system has stopped taking the deduction.
3. Enter the *Amount* to deduct from the employee's net earnings (after taxes).
4. Enter the *Start Date*; the system begins processing the deduction on or after this date.
5. Enter the *Stop Date*; the system stops processing this deduction on or after this date.
6. Click **Save**.

Scheduled Payments

A Scheduled Payment establishes payments for a specific date in the future, or a repeated payment each pay date during a specified time period.



HR / Change / Employee Details Client: (00642) GMS DEMO

Frank Footer | Name | Personal | Address | Work | Pay | Tax | Deposit | Skills

Employee: A41753

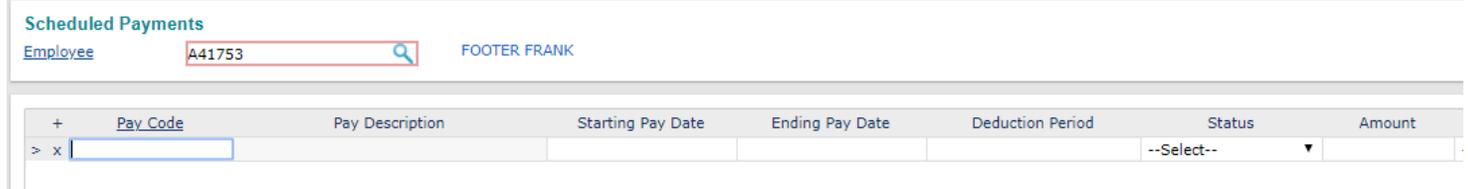
Name & Contact

Last Name: Footer
 First Name: Frank
 Middle Name:
 Nickname:
 Work Phone:
 Work Email: frankinfoot@gmail.com
 ESS User Name:
 Save Cancel Close

Employment

Employment Status: ACTIVE
 Status Date: 03/01/2018
 Employment Type: FT
 Type Date: 03/01/2018
 Position: HOTEL/REST. E.E.'S
 Position EEO Code: LABOR
 FLSA Exempt:
 W/C Class:
 Employer: GROUP MANAGEMENT SERVICES STANDARD, INC
 Employer Start Date: 01/01/2018
 Last Hire Date: 01/01/2018
 Original Hire Date: 01/01/2018

Audit
 Benefit Overview
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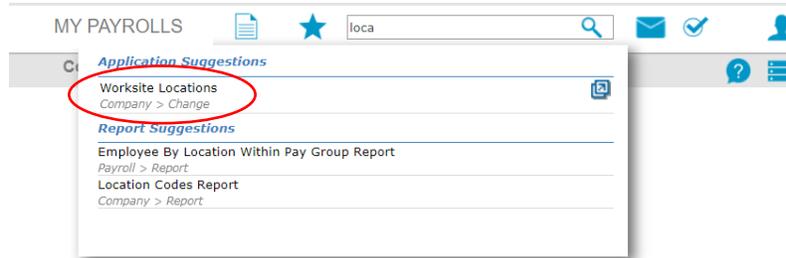
Scheduled Payments Employee: A41753 FOOTER FRANK

	Pay Code	Pay Description	Starting Pay Date	Ending Pay Date	Deduction Period	Status	Amount
> x						--Select--	

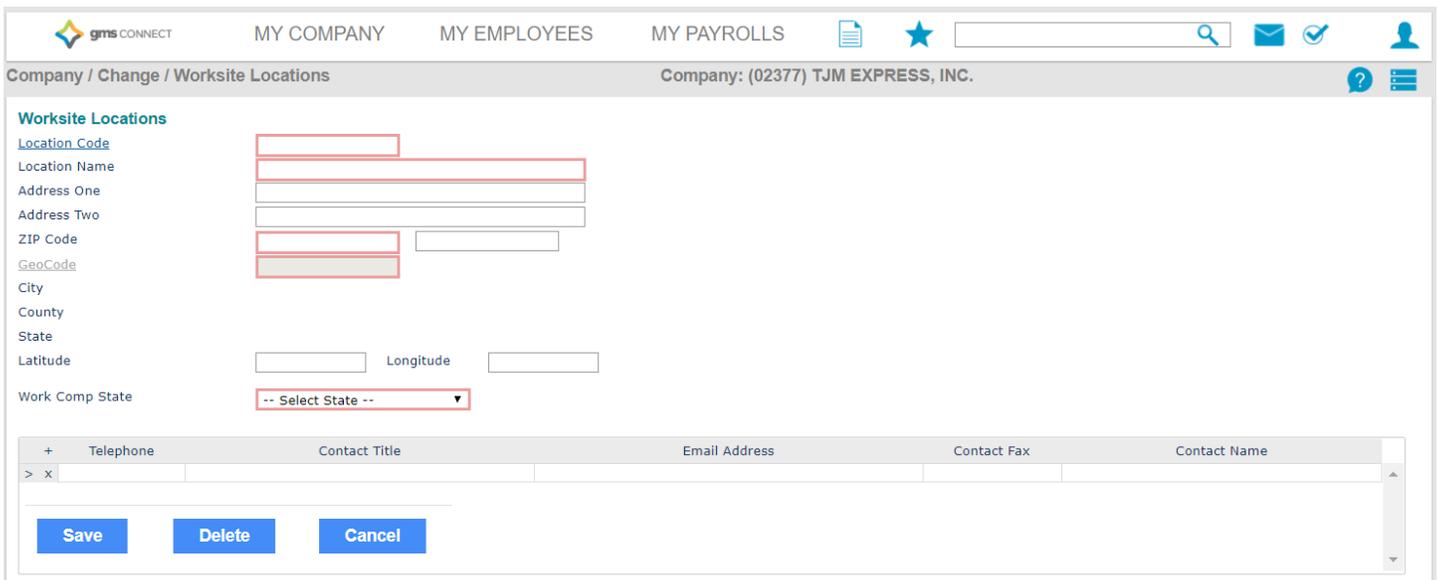
1. Enter the *Pay Code* for this payment. The *Pay Description* displays.
2. Enter the *Starting Pay Date* and *Ending Pay Date* when the payment is in effect.
3. Enter the *Deduction Period* to make this payment on certain periods within the date range. For example, if you enter 2, GMS Connect makes the payment in the second pay period of the month.
4. Select the *Status* to specify when the scheduled payment occurs:
 - **One Time:** The payment is made once during the specified pay range and then set to **Inactive**.
 - **Active:** The payment is made each pay period during the date range.
 - **Inactive:** No payment will be made.
5. Enter the *Amount* to pay the employee.
6. Click **Save**.

Locations

You can manage worksite locations by navigating to My Company/Worksite Locations or using the search bar:



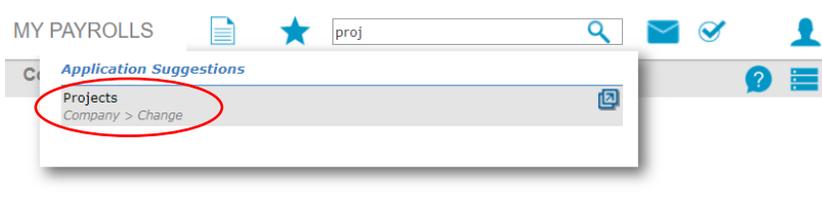
1. Select an existing location by clicking "Location Code," or enter a new one.
2. Enter the zip code for the location. You will be prompted to select the proper geocode, which will prompt the system to withhold the proper taxes for the location.
3. Select the Worker's Comp State under which the location is covered by worker's comp insurance.
4. Click **Save** and your location will be available for use.



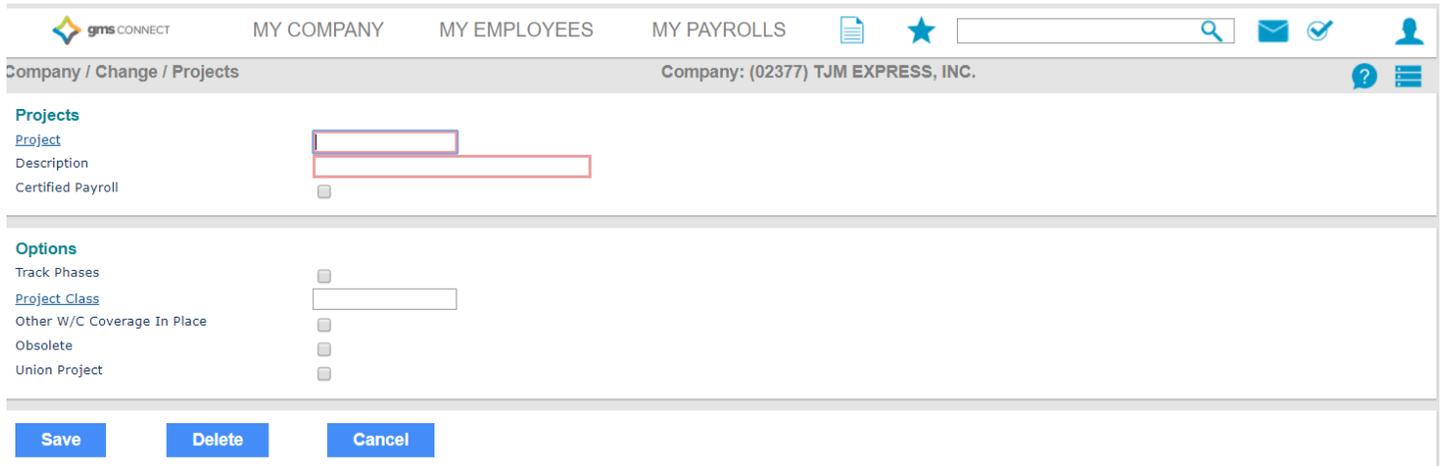
A screenshot of the 'Worksite Locations' form in the application. The form is titled 'Worksite Locations' and is located under the 'Company / Change / Worksite Locations' section. The form contains several input fields: 'Location Code', 'Location Name', 'Address One', 'Address Two', 'ZIP Code', 'GeoCode', 'City', 'County', 'State', 'Latitude', 'Longitude', and 'Work Comp State'. The 'Work Comp State' field is a dropdown menu with the text '-- Select State --'. Below the form is a table with columns for 'Telephone', 'Contact Title', 'Email Address', 'Contact Fax', and 'Contact Name'. At the bottom of the form are three buttons: 'Save', 'Delete', and 'Cancel'.

Projects

You can manage projects by navigating to My Company/Projects or using the search bar:

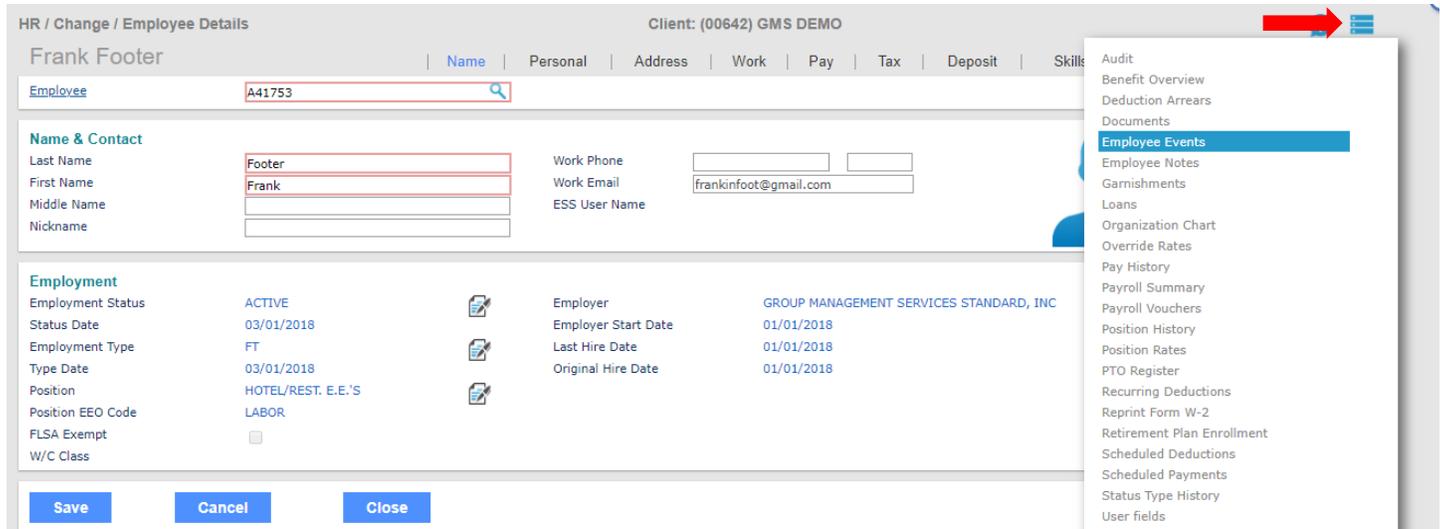


1. Select an existing project by clicking "Project," or enter a new one.
2. If your project is a certified project, select the "Certified Payroll" box and more options will appear.
If you have any questions about these fields, contact your Payroll Specialist.
3. Click **Save** and your project will be available for use.



Event Codes

Employee events can be tracked under Employee Details/Employee Events:



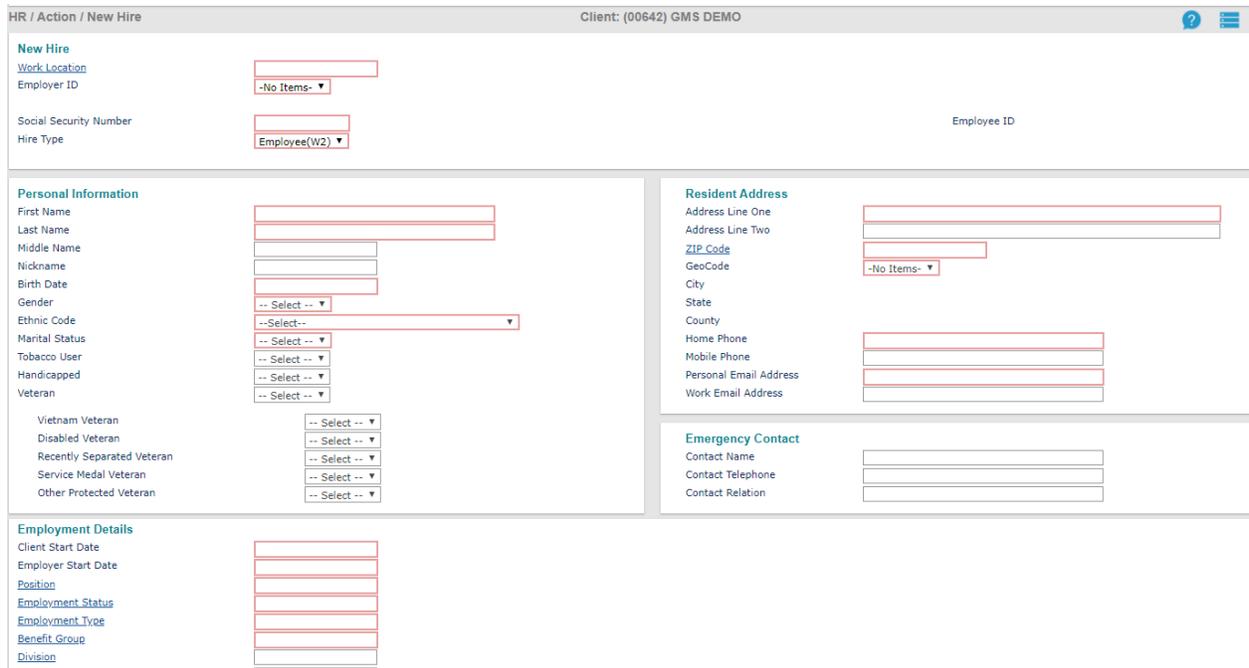
Enter the *event date* and the *event code*, and save.



+	Event Date	Event Code	Event Description	Action Date
>	x			

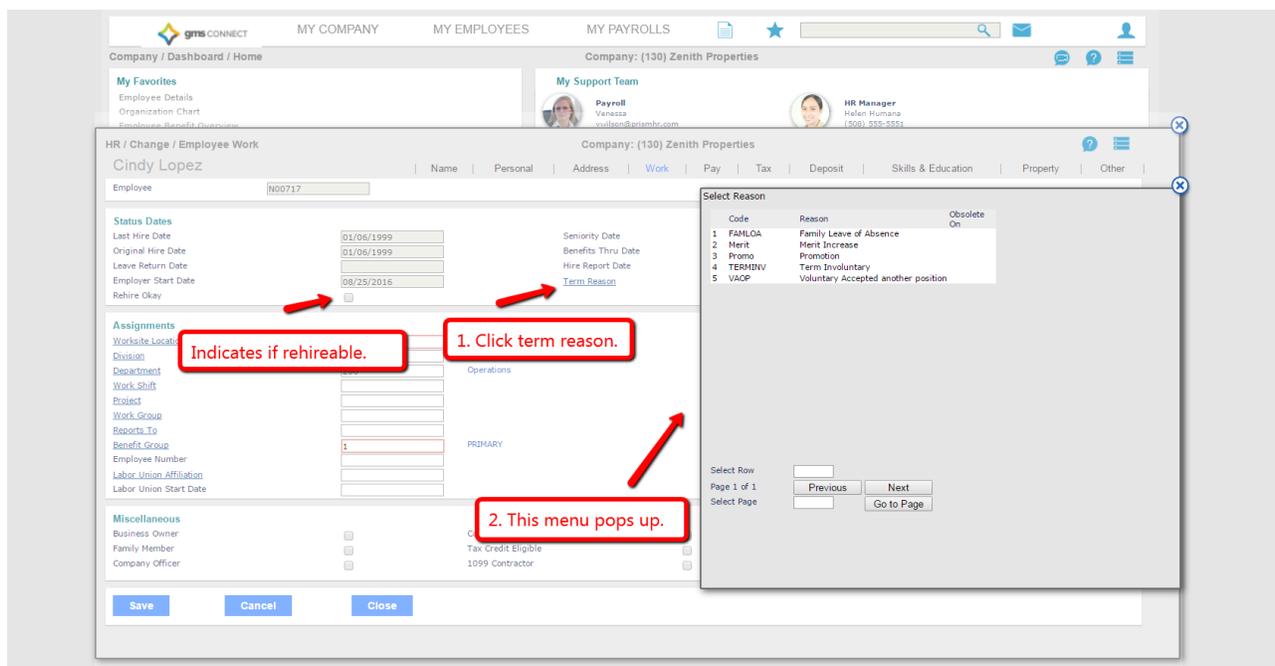
New Hire

Navigate to HR/Action/New Hire and enter the appropriate fields. Required fields are in **RED**.



Termination

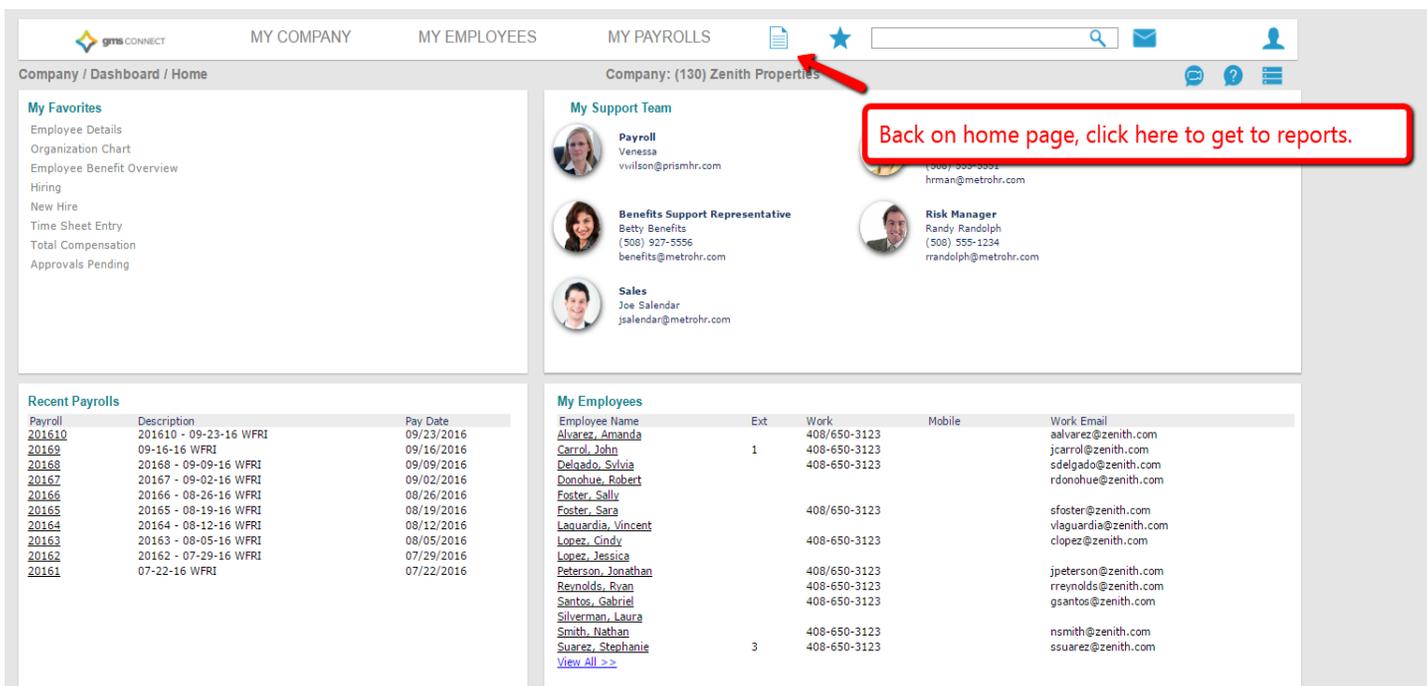
Navigate to HR/Action/Termination and enter the appropriate fields. Required fields in **RED**. Be sure to check the indicator that the employee is eligible for rehire, if applicable.



Code	Reason	Obsolete
1	FAHLOA Family Leave of Absence	On
2	Merit Merit Increase	
3	Promo Promotion	
4	TERMINV Term Involuntary	
5	VACOP Voluntary Accepted another position	

Reports

Click the “reports” button on the Navigation Toolbar to access the various reports available in GMS Connect. These can all be generated and exported to excel, pdf, or csv. format. You can drill down by location, department, position type, etc. to get a clear picture of your employee data with the exact information you are looking for.



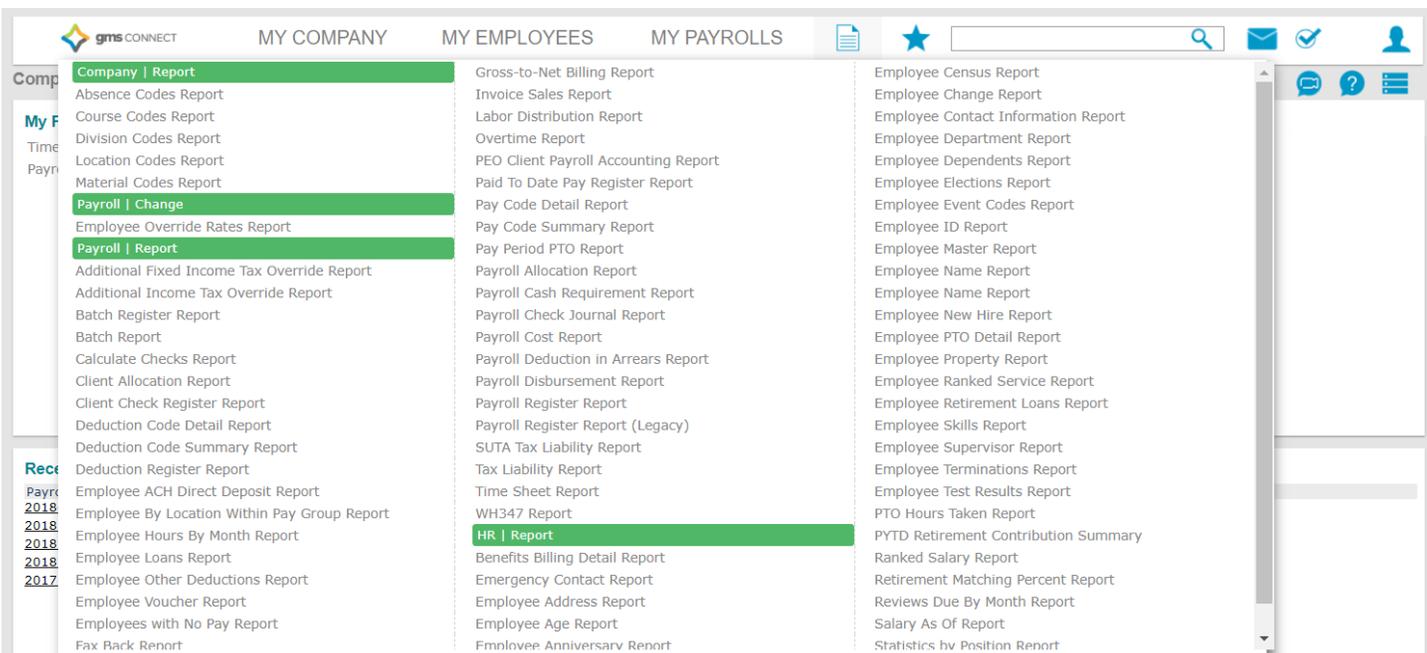
The screenshot shows the GMS Connect dashboard with the following sections:

- Navigation Bar:** MY COMPANY, MY EMPLOYEES, MY PAYROLLS, and a document icon (reports) with a red arrow pointing to it.
- Company / Dashboard / Home:** Company: (130) Zenith Properties
- My Favorites:** Employee Details, Organization Chart, Employee Benefit Overview, Hiring, New Hire, Time Sheet Entry, Total Compensation, Approvals Pending.
- My Support Team:**
 - Payroll:** Venessa (vwillson@prisahr.com)
 - Benefits Support Representative:** Betty Benefits (508) 927-5556 (benefits@metrohr.com)
 - Risk Manager:** Randy Randolph (508) 555-1234 (rrandolph@metrohr.com)
 - Sales:** Joe Salendar (jsalendar@metrohr.com)
- Recent Payrolls:**

Payroll	Description	Pay Date
201610	201610 - 09-23-16 WFRI	09/23/2016
20169	09-16-16 WFRI	09/16/2016
20168	20168 - 09-09-16 WFRI	09/09/2016
20167	20167 - 09-02-16 WFRI	09/02/2016
20166	20166 - 08-26-16 WFRI	08/26/2016
20165	20165 - 08-19-16 WFRI	08/19/2016
20164	20164 - 08-12-16 WFRI	08/12/2016
20163	20163 - 08-05-16 WFRI	08/05/2016
20162	20162 - 07-29-16 WFRI	07/29/2016
20161	07-22-16 WFRI	07/22/2016
- My Employees:**

Employee Name	Ext	Work	Mobile	Work Email
Alvarez, Amanda		408/650-3123		aalvarez@zenith.com
Carroll, John	1	408-650-3123		jcarroll@zenith.com
Delgado, Sylvia		408-650-3123		sdelgado@zenith.com
Donohue, Robert				rdonohue@zenith.com
Foster, Sally		408/650-3123		sfoster@zenith.com
Lauardia, Vincent				vlauardia@zenith.com
Lopez, Cindy		408-650-3123		clopez@zenith.com
Lopez, Jessica				
Peterson, Jonathan		408/650-3123		jpeterson@zenith.com
Reynolds, Ryan		408-650-3123		rreynolds@zenith.com
Santos, Gabriel		408-650-3123		gsantos@zenith.com
Silverman, Laura				
Smith, Nathan		408-650-3123		nsmith@zenith.com
Suarez, Stephanie	3	408-650-3123		ssuarez@zenith.com

A red callout box with the text "Back on home page, click here to get to reports." points to the reports icon in the navigation bar.

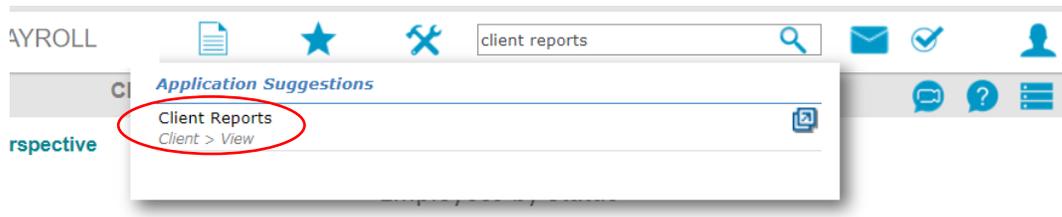


The screenshot shows the GMS Connect reports menu with the following categories and reports:

- Company | Report:** Gross-to-Net Billing Report, Invoice Sales Report, Labor Distribution Report, Overtime Report, PEO Client Payroll Accounting Report, Paid To Date Pay Register Report, Pay Code Detail Report, Pay Code Summary Report, Pay Period PTO Report, Payroll Allocation Report, Payroll Cash Requirement Report, Payroll Check Journal Report, Payroll Cost Report, Payroll Deduction in Arrears Report, Payroll Disbursement Report, Payroll Register Report, Payroll Register Report (Legacy), SUTA Tax Liability Report, Tax Liability Report, Time Sheet Report, WH347 Report.
- Payroll | Change:** Employee Override Rates Report.
- Payroll | Report:** Additional Fixed Income Tax Override Report, Additional Income Tax Override Report, Batch Register Report, Batch Report, Calculate Checks Report, Client Allocation Report, Client Check Register Report, Deduction Code Detail Report, Deduction Code Summary Report, Deduction Register Report, Employee ACH Direct Deposit Report, Employee By Location Within Pay Group Report, Employee Hours By Month Report, Employee Loans Report, Employee Other Deductions Report, Employee Voucher Report, Employees with No Pay Report, Fax Back Report.
- HR | Report:** Benefits Billing Detail Report, Emergency Contact Report, Employee Address Report, Employee Age Report, Employee Anniversary Report.
- Employee Census Report:** Employee Change Report, Employee Contact Information Report, Employee Department Report, Employee Dependents Report, Employee Elections Report, Employee Event Codes Report, Employee ID Report, Employee Master Report, Employee Name Report, Employee Name Report, Employee New Hire Report, Employee PTO Detail Report, Employee Property Report, Employee Ranked Service Report, Employee Retirement Loans Report, Employee Skills Report, Employee Supervisor Report, Employee Terminations Report, Employee Test Results Report, PTO Hours Taken Report, PYTD Retirement Contribution Summary, Ranked Salary Report, Retirement Matching Percent Report, Reviews Due By Month Report, Salary As Of Report, Statistics by Position Report.

Company Reports

A library of reports is available by navigating to My Company/Client Reports or by using the search bar. This is where you will find reports processed by your Payroll Specialist.



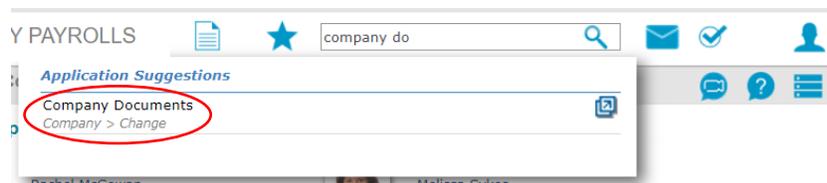
Click the icon to the right of the report to download a copy.

Client Reports

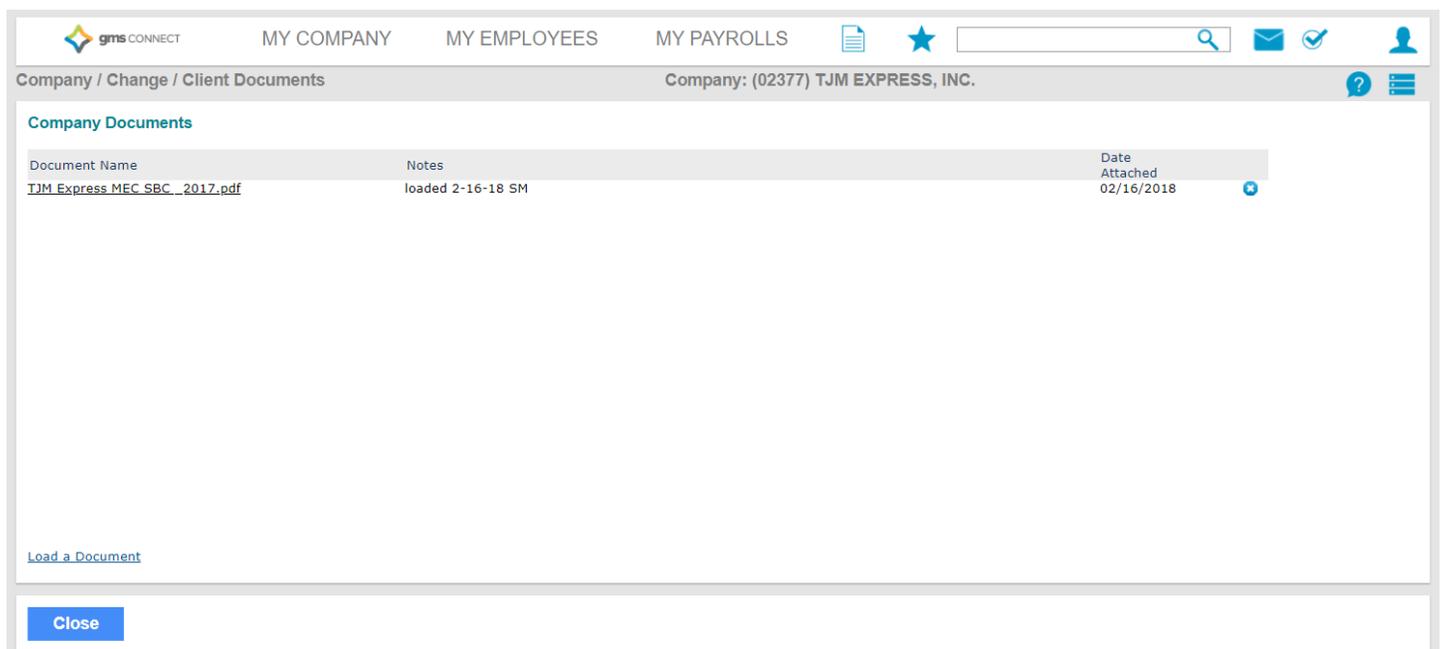
Date	Time	Report Title	Class	User Id	User Name	Job
01/17/2017	11:53:57	Payroll Alloc Rpt	PCLtoPDF	kgrates	Katherine Grates	 
01/17/2017	10:24:01	Wc Accrual Mod Rpt	PCLtoPDF	kgrates	Katherine Grates	1387  
01/17/2017	10:22:21	PSE Download for ACA Eligibility Client: 169 Generated: 01/17/:ACA Report		kgrates	Katherine Grates	1387  
01/17/2017	10:22:00	ACA Eligibility Report Client: 169 Generated: 01/17/2017 at 10:ACA Report		kgrates	Katherine Grates	1386  

Company Documents

A library of reports is available by navigating to My Company/Client Documents or by using the search bar.

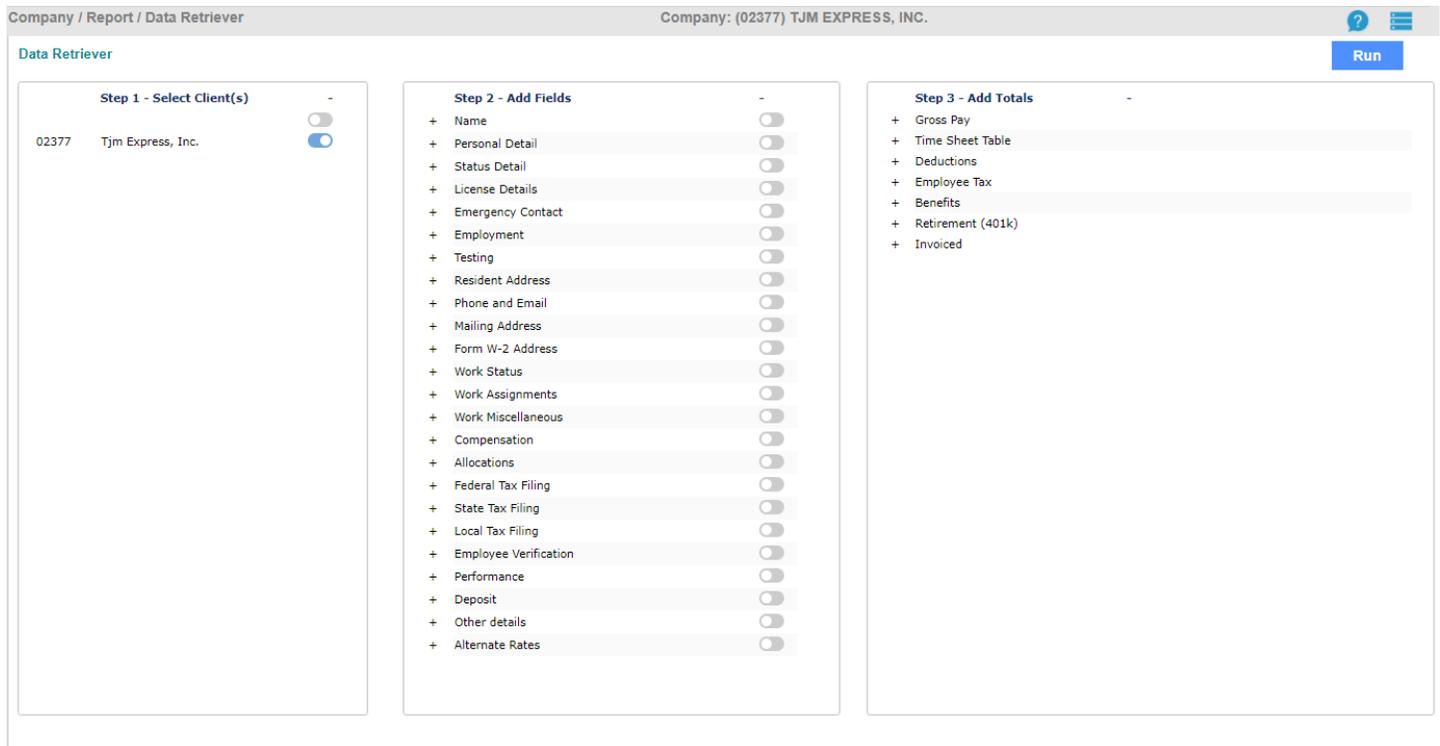


You can upload important documents to have on hand whenever you need them.



Data Retriever – Custom Reporting

Search for “Data Retriever” in the search menu. The following screen displays:

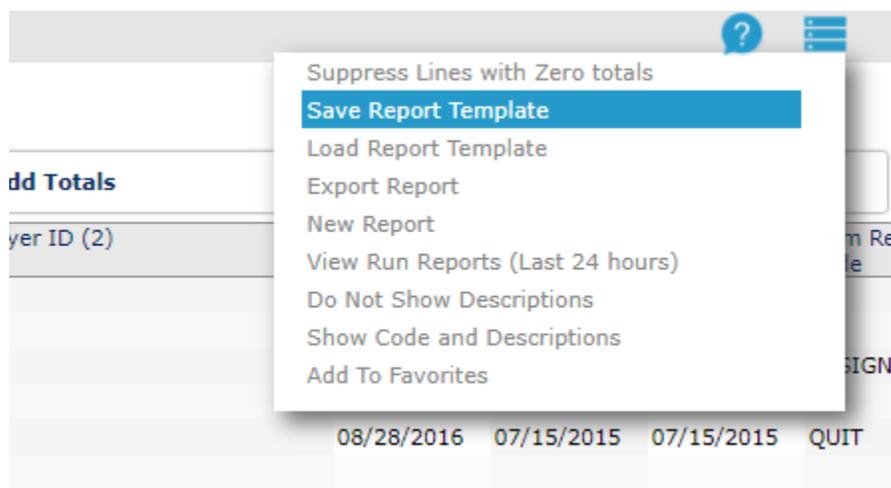


The screenshot shows the 'Data Retriever' configuration screen for 'Company: (02377) TJM EXPRESS, INC.'. It is divided into three main sections:

- Step 1 - Select Client(s):** Shows a list of clients with a toggle switch. One client, '02377 Tjm Express, Inc.', is selected.
- Step 2 - Add Fields:** A list of 25 fields with toggle switches, including Name, Personal Detail, Status Detail, License Details, Emergency Contact, Employment, Testing, Resident Address, Phone and Email, Mailing Address, Form W-2 Address, Work Status, Work Assignments, Work Miscellaneous, Compensation, Allocations, Federal Tax Filing, State Tax Filing, Local Tax Filing, Employee Verification, Performance, Deposit, Other details, and Alternate Rates.
- Step 3 - Add Totals:** A list of 7 total categories with toggle switches: Gross Pay, Time Sheet Table, Deductions, Employee Tax, Benefits, Retirement (401k), and Invoiced.

A 'Run' button is located in the top right corner of the configuration area.

You can select any parameters you would like to build your own custom reports! The setup can then be saved for future use:



This screenshot shows a context menu overlaid on the report configuration screen. The menu items are:

- Suppress Lines with Zero totals
- Save Report Template** (highlighted)
- Load Report Template
- Export Report
- New Report
- View Run Reports (Last 24 hours)
- Do Not Show Descriptions
- Show Code and Descriptions
- Add To Favorites

The background shows a table with columns for dates and a 'QUIT' button.

We hope that this guide has been helpful in getting started with GMS Connect – should you require assistance, feel free to call us at (330) 659-0100.