2.1 How to use BFT Payroll - single point of entry (i)

1. Background

Actual Payroll £ and FTE data are loaded from Core HR payroll to BFT Payroll each month.

BFT payroll uses the actual data to drive a projection for the "Plan" months, calculated for each individual employee in each cost centre. Each forecast (and budget) is based on data for the most recent completed quarter as follows:

Forecast	Actual payroll data	Plan months
Q1	3 Months	9
Q2	6 Months	6
Q3	9 Months	3
Budget	6 Months	12

Provisions can be added to reflect planned changes (e. g. joiners and leavers). BFT Payroll also allows amendment of FTEs, cost codes, grade/stage, pension scheme and "Other" payroll costs, all at an individual level, to model payroll costs.

Departments/Divisions optionally adjust actual BFT payroll data to reflect journal entries made in the Financials General Ledger, so as to reconcile BFT Payroll to the Financials GL at cost centre level.
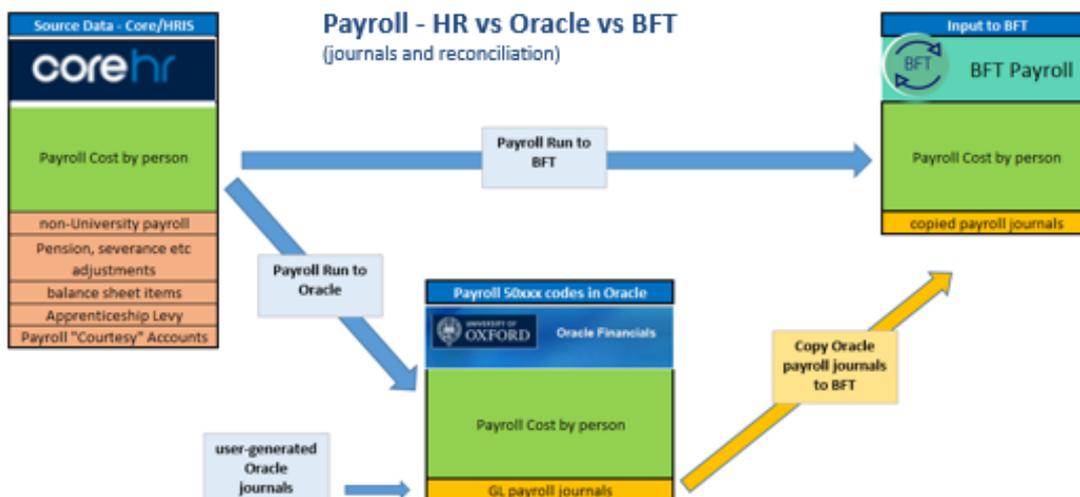
The BFT Payroll projection (Plan months) for each employee is based on:

Standard Grades

> **FTE** x **Monthly Gross Pay** for grade/scale point + **Pension** + **National Insurance**

Non-Standard Grades

> **Most recent month's Gross Pay** + **Pension** + **National Insurance**

BFT Pay projections – overview of the calculation

New user Training Jan 2020
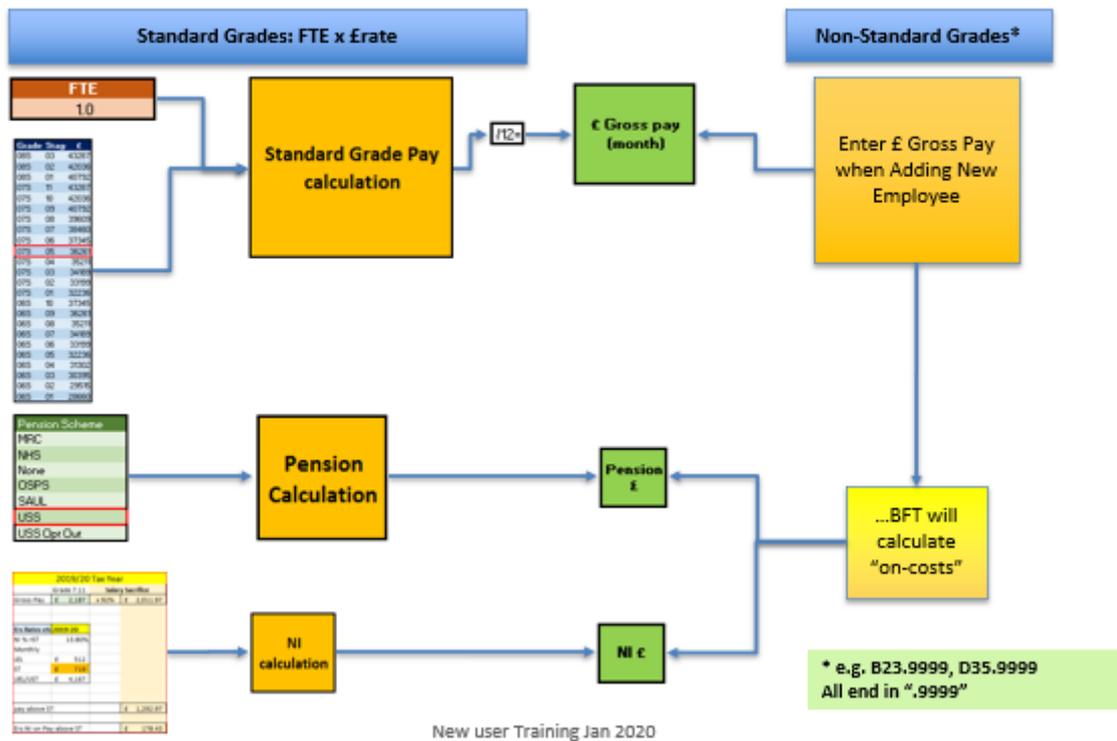
2.1 Navigating Payroll

How to navigate payroll - there is one point of entry for the majority of Payroll actions
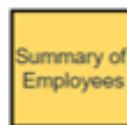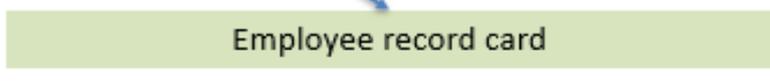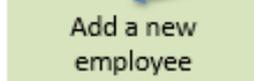
2.2 To open payroll single point of entry

Click on the yellow "Summary of Employees" button on the BFT Landing Page
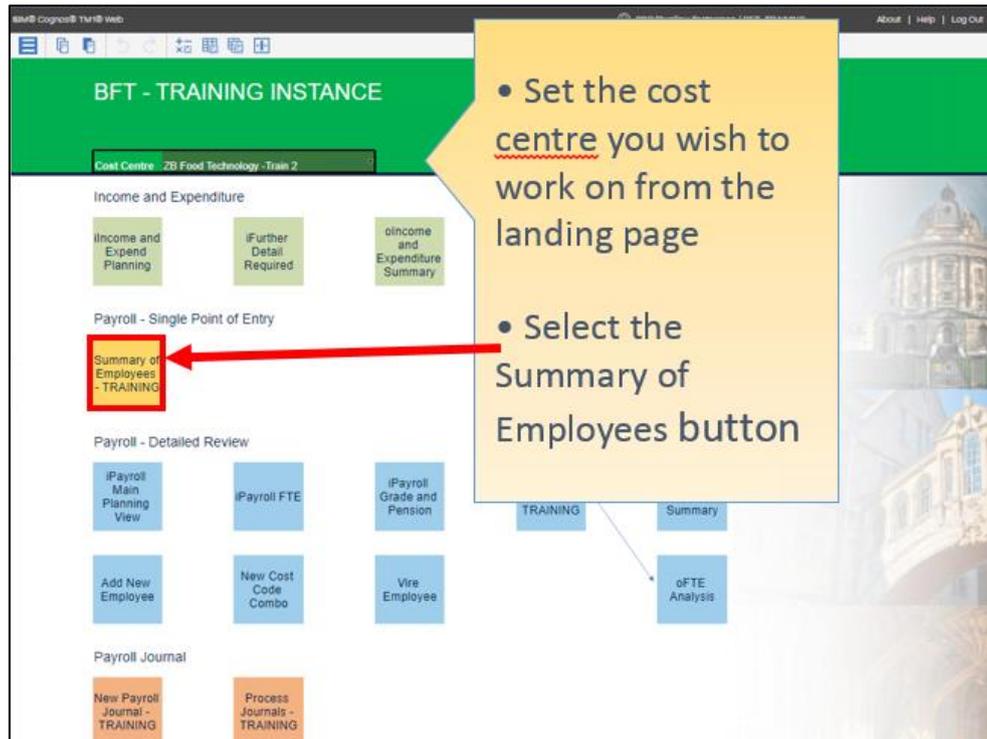
3. Summary of Employees

In the Summary of Employees (SoE) screen you can:

      3.1 Filter to show a subset of the on-screen data

      3.2 Expand Employee List to show additional detail, and filter on the expanded data (account codes etc)

      3.3 Export the SoE screen to an Excel Workbook, keeping the formatting

      (The SoE is also used for launching the Employee Record Card. This topic is dealt with in depth in: 2.2 How to use BFT Payroll Single Point of Entry (ii)

3.1 Filter to show a subset of the data

3.2 Expand Employee List and filter the data to get more detail

• Double-click "Employee List" in the header

• Select "Employee List Expanded"

…and click icon in header to rebuild sheet

• Enter filter criteria in Expanded report

• Cursor in pale blue border
• choose filter criteria from dropdown list (e.g. SoF code "A2007" (F9 to enter)

•Click icon in header to rebuild sheet

3.3 Export the SoE screen to an Excel Workbook, keeping the formatting

• Click on the "ladder" menu at the top of the SoE screen and select "Export/Snapshot to Excel"

"Ladder" menu

Export / Snapshot to Excel

• Click OK to accept the defaults in the Export dialogue
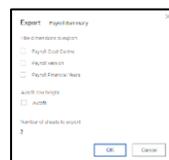
• Save to save the Excel file to your machine
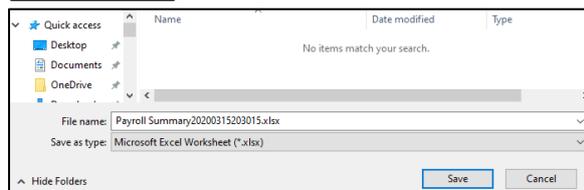
3.4 Launch the Employee Record Card to review and amend the detail for a single Employee

**For in-depth Employee Record Card is