Post-Data Extract Procedures

There are a few processes that need to be setup and verified after the data has been imported before processing begins.

- **Go to System/Configuration**

  -**Account Mapping Configuration**-Verify that setup matches setup in USPCON.

  -**Email Configuration**-Verify Port and SMTP Host data are accurate.

  -**Email Direct Deposit Notice Configuration**-Update the **From Email** field to contain the correct email address.

  -Verify that the **Employee Number Automatic Generation Configuration** matches EMPIDS_PREFS.INI file (if applicable).

- **Go to System/Modules**

  -Click on the [+] to turn on **Email Notification Services**.

  -Click on the [+] to turn on **the Employer Distribution Module** (BRDDIS).

  -Click on the [+] to turn on **the Employer Retirement Share Module** (BRDRET) (if applicable).

  -Click on the [+] to turn on the **Http Notification Services**.

  -Click on the [+] to turn on the **Mass Change Service**.

  -Click on the [+] to turn on the **USAS Integration Module**.

  -Click the refresh button [C] for all changes to take affect.

- **Go to Payments/Check Register**

  -Verify the highest check number matches highest check number in USPCON.

- **Go to Payments/Payroll Payments**

  -Verify the highest direct deposit number matches the highest direct deposit number in USPCON.

- **Go to Payments/Payee Payments**

  -Verify that the highest electronic transfer number matches the highest electronic transfer Number in USPCON.\
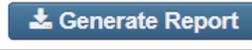

- **Go to Reports**
  -Click on **Leave Balance Report**
  -Choose **Sort By** option from drop down
  -Choose **Page Break On** option from drop down
 -Choose **Leave Report Options** from drop down
  -Unselect any pay group you do not wish to appear on the report moving them to the **Available** box

  -Click [± Generate Report]

- In classic run the BENRPT using the same sort option that was used in the redesign

- Compare all leave totals on the Leave Balance Report with the BENRPT

- Any corrections or adjustments can be made by going to LEAVES/ACCUMULATIONS
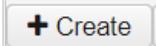
  -Click on [+ Create]
  -**Employee**- Find employee by typing in a few characters of first or last name then clicking on the employee

name
-**Position**-Select Position from drop down
-**Leave**-Choose the type of leave from the drop down
-**Leave Unit**-Should default to current leave unit (Daily /Hourly)
-**Description**- Enter a description of what this adjustment is for (optional)
-**Length-** Enter the length days/hours this adjustment entry is for (ex. 1.00 or -1.00)
-**Transaction Date**-Enter or select the date from the calendar for this transaction

-Click **✔ Save**