DPN Integration

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Version 1

Table of Contents

1. About This Integration

This integration allows you to generate payroll extract files that can then be loaded directly into DPN Payroll.

There are many types of data that you'll need from People to pull into DPN. To gather this data, you'll first need to create some queries and logbooks within PeopleHR which is where the required information is pulled from.

2. Core Data

2.1 Prerequisites

Core data consists of standard information used to identify an employee such as their name, job role, contact details etc. Some fields will be named differently in People as to what will fields will be populated in DPN Payroll.

These are stated below as *DPN Field = PeopleHR field*

- Employee Number = Employee ID
- Occupation = Job Role
- Left Date = Final Day of Employment
- Surname = Last Name
- Forename(s) = First Name
- Account No = Account Code
- Sort code = Bank Code
- Part time / Full time = Employment Type

The following are hardcoded values that will pull into the core employee extract and cannot be changed.

- Payroll Status: (Active/Inactive)
- Status: (New/Update/Leaver)
- Initial: (Take the first letter of the FirstName and first letter of the LastName)
- NI/SS Category: (Take the last letter from the NI number)

2.2 Query: Core Data

The query builder lets you extract information from the system into the form of a report, if you are unfamiliar with this feature, check out:

https://help.peoplehr.com/reports-queries-data/queries-how-to-create-a-query

1. See the below table on what areas to select for this query.

Area (1st Column):	**Employee Details**		**Contacts**		**Leavers**
Fields to be selected:	-Employee ID -First Name -Last Name -Title -Known As -Date of Birth -Employment type	-Department -Job role -Start Date -NI/SSN -Contracted hours	-Address Line 1 -Address Line 2 -Town/City -County/State -Country -Post Code	-Bank Name -Bank Code -Account Name -Account code	-Final Date of Employment

2. No filters are required for this query, so you can skip the next step.

3. You can then name the query. This should be named exactly how shown below:

'Payroll : DPN'

Please note: This data will not pull through the integration if the query is not named as shown.

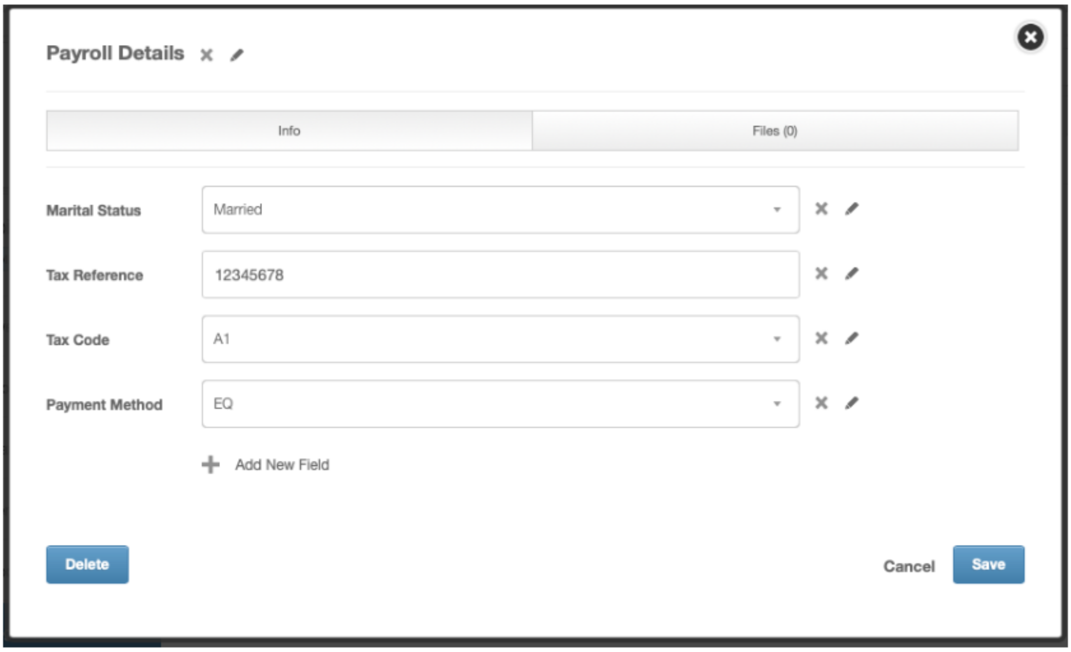
2.3 Building the logbook

Next you'll need to create a custom logbook screen. If you are unfamiliar with this feature, please see: https://help.peoplehr.com/logbook/customise-the-logbook

Logbook Name: Payroll Details

- Field 1 (Dropdown): Marital Status
- Field 2 (Text field): Tax Reference
- Field 3 (Dropdown): Tax Code
- Field 4 (Dropdown): Payment method.
- Field 5 (Text field) : NI Table

Your logbook should look something like this:



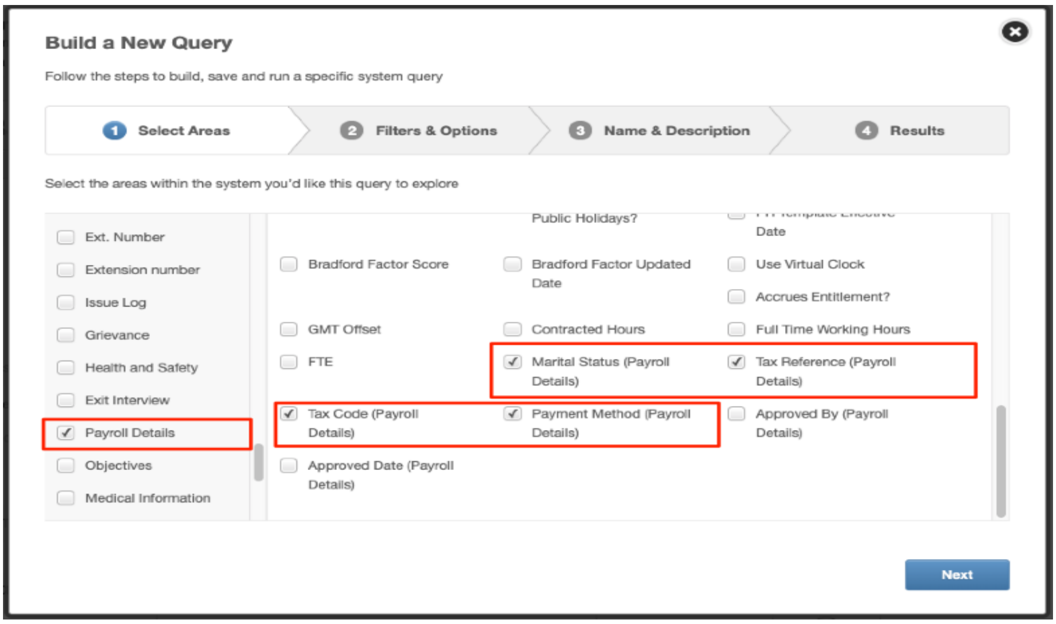
2.4 Query: Additional Core Data

Now that you have created the above logbook, you can build a query to pull this information into the extract.

1. See the below table on what areas to select for this query.

Area (1st Column):	Employment Details	Payroll Details
Fields to be selected:	-Employee ID -First Name -Last Name	-Marital Status (Payroll Details) -Tax Reference (Payroll Details) -Tax Code (Payroll Details) -Payment Method (Payroll Details) - NI Table (Payroll Details)

Here's a screenshot to guide you:



2. No filters are required for this query, so you can skip the next step.

3. You can then name the query. This should be named exactly how shown below:

'Payroll : DPN Custom'

3 Salary and Payments

3.1 Basic Salary Data

Before extracting salary data, you'll need to ensure that your employees have a salary record in their Personal tab. On how to add salaries, please see: https://help.peoplehr.com/employee-profile/addamend-employee-salary

The following table explains how you should record an employee's salary within People HR based on their salary type, and how the tool will then calculate their pay based on the selected payroll start and end date.

Salary Type	Set salary up as:	The calculation
Annual Salaries	Salary Type = Annual Payment Frequency = Monthly Amount = Their monthly amount	[Typically] Gross basic pay = annual salary / 12 [Starters and Leavers] Salary / 52 / number of days worked per week multiplied by number of days worked in month
Paid at daily rate	Salary Type = Daily Payment Frequency = Monthly Amount = Their daily amount	No. of days approved by their line manager in the payment period date range **[multiplied by]** employee's Salary Amount (daily rate)
Paid at hourly rate	Salary Type = Hourly Payment Frequency = Monthly Amount = Their hourly amount	No. of hours approved by their line manager in the payment period date range **[multiplied by]** Employee's Salary Amount (hourly rate)

You do not need to build a query on this data, the tool will pick this up automatically.

3.2 Sending Entitlements & Deductions to payroll

If you want to include entitlements and deductions, you'll need to ensure that your employees have their entitlements and/or deductions added to their salary record.

You can add this when first creating the employee's salary record (Personal tab) or at a later date.

You can also add this information in bulk:

- Click here for the article on bulk entitlements
- Click here for the article on bulk deductions

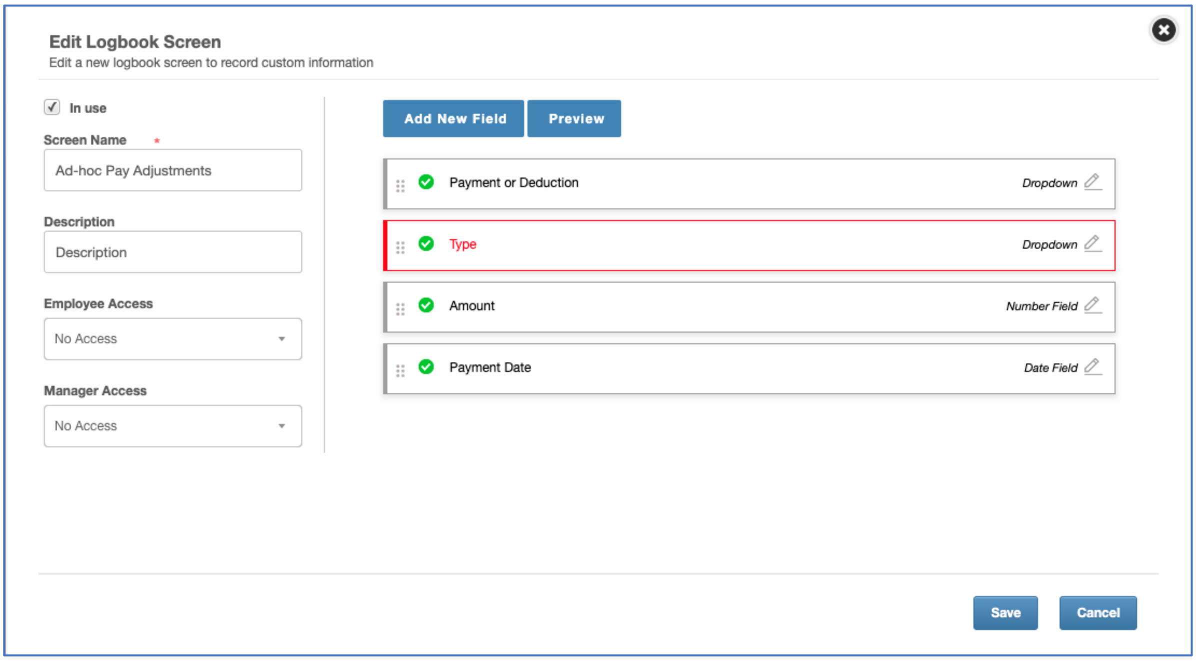
You do not need to build a query on this data, the tool will pick this up automatically.

3.3 Sending Ad-hoc payments to payroll

A logbook is required to record ad-hoc pay adjustments.

Logbook Name: Ad-hoc Pay Adjustments

- Field 1 (Dropdown): Payment or Deduction
- Field 2 (Dropdown): Type
- Field 3 (Number field): Amount
- Field 4 (Date field): Payment date

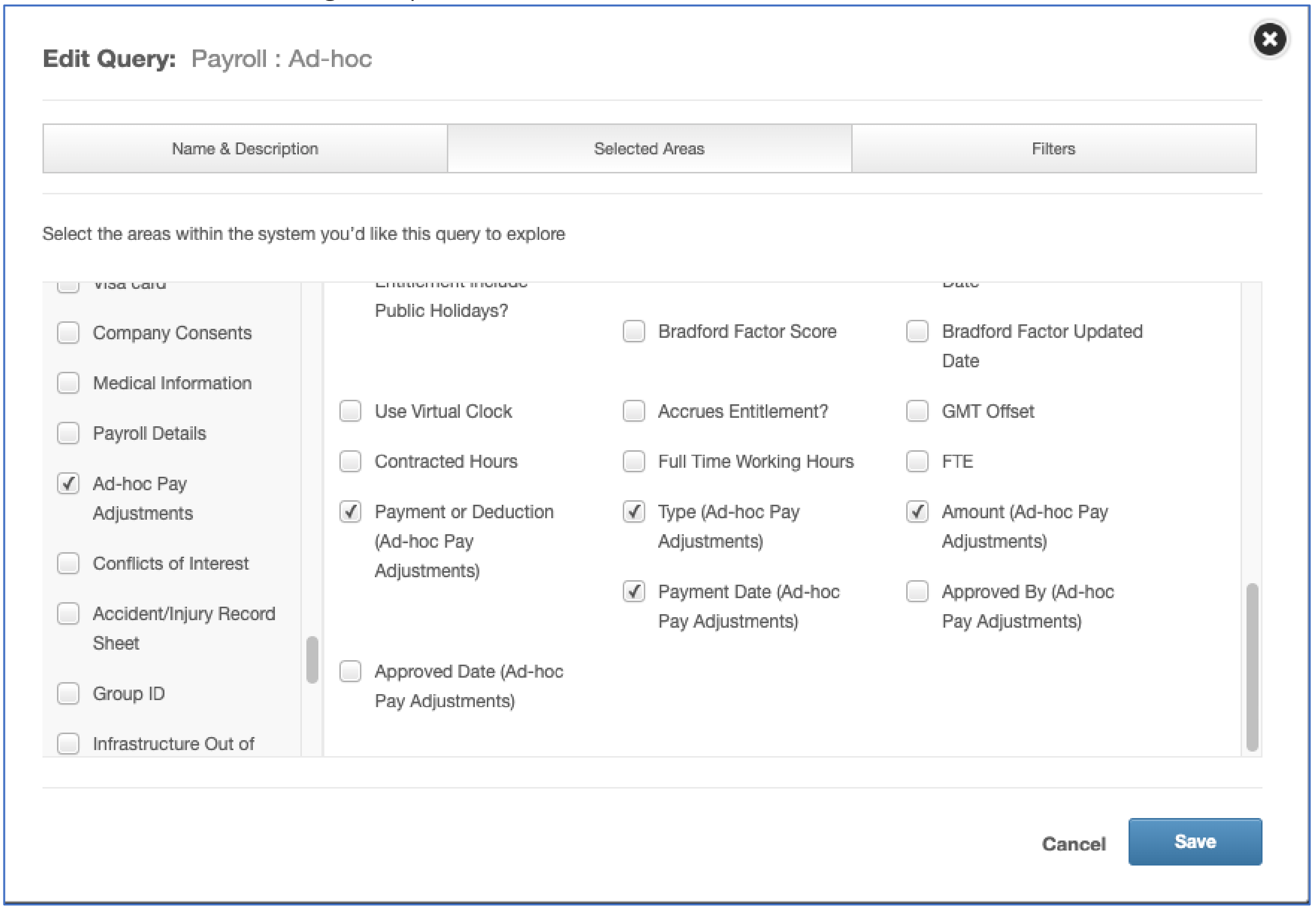


You’ll then need to create a query to capture the logbook data.

Query Name: Payroll : Ad-hoc

Area (1st Column):	<u>Employment Details</u>	<u>Ad-hoc Pay Adjustments</u>
Fields to be selected:	- Employee ID - First Name - Last name	- Payment or Deduction (Ad-hoc Pay Adjustments) - Type (Ad-hoc Pay Adjustments) - Amount (Ad-hoc Pay Adjustments) - Payment Date (Ad-hoc Pay Adjustments)

Here’s a screenshot to guide you:



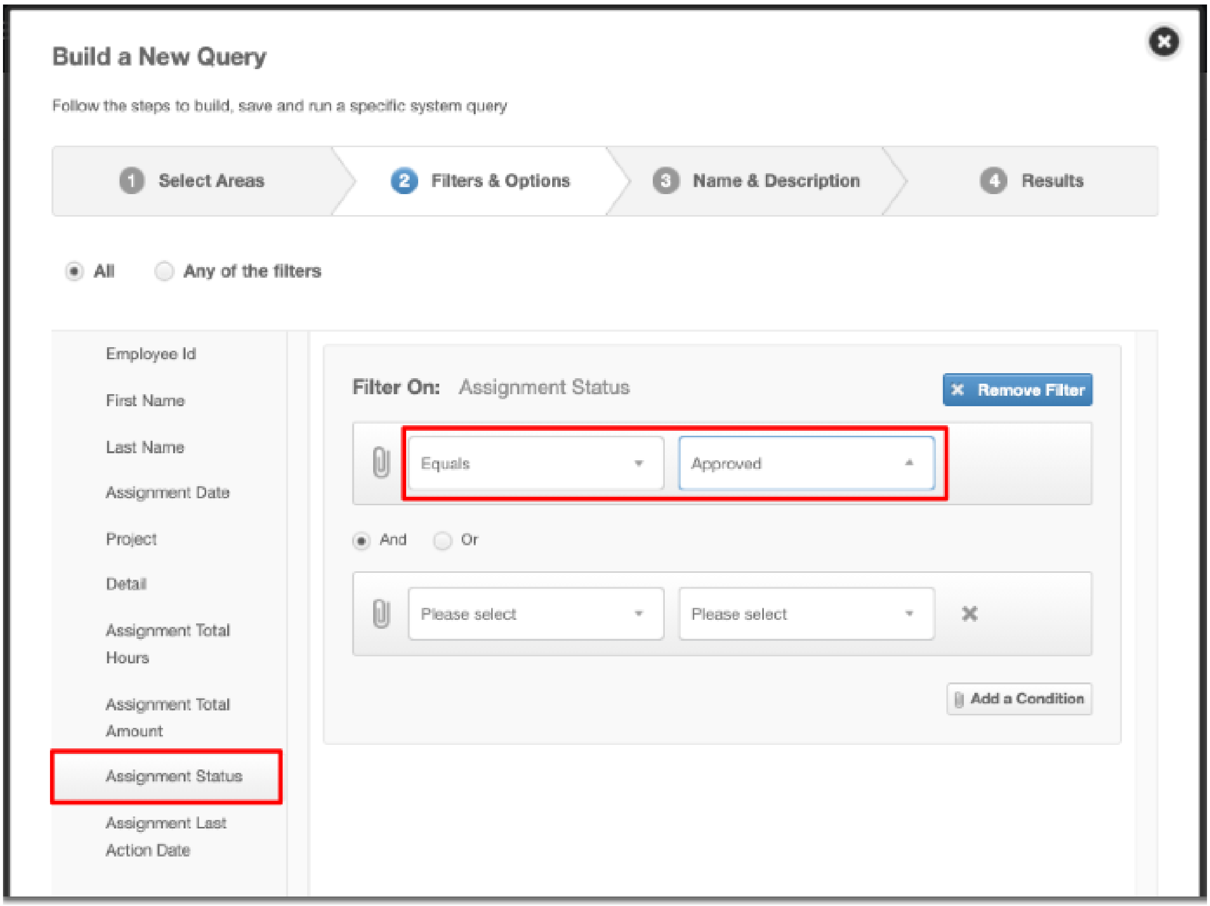
3.4 Sending Overtime (Assignment) Data to Payroll:

In order to capture employee's over time data that is logged via Assignments within People HR, here's what query you'll need to build.

Query Name: Payroll : Overtime Feed

Area (1st Column):	Employment Details	Assignment
Fields to be selected:	- Employee ID - First Name - Last name	- Assignment Date - Project - Detail - Assignment Total Hours - Assignment Total Amount - Assignment Status - Assignment Last Action Date

IMPORTANT: Filters	'Assignment Status' needs to be filtered to only show approved assignments. See screenshot below:



4 Setting up

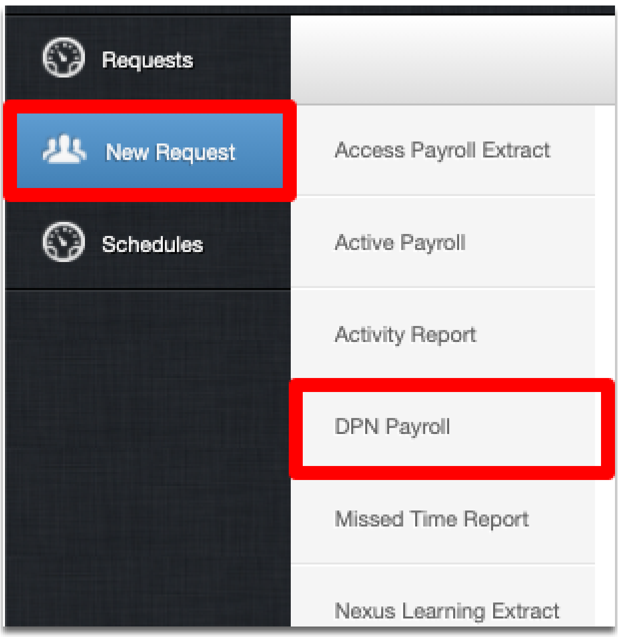
1. You'll first need to create an API key that includes access to Queries, Employee and Salary.

   You are able to just select this specific query if you wish. On how to create an API key, please see: http://help.peoplehr.com/integrations/creating-an-api-key

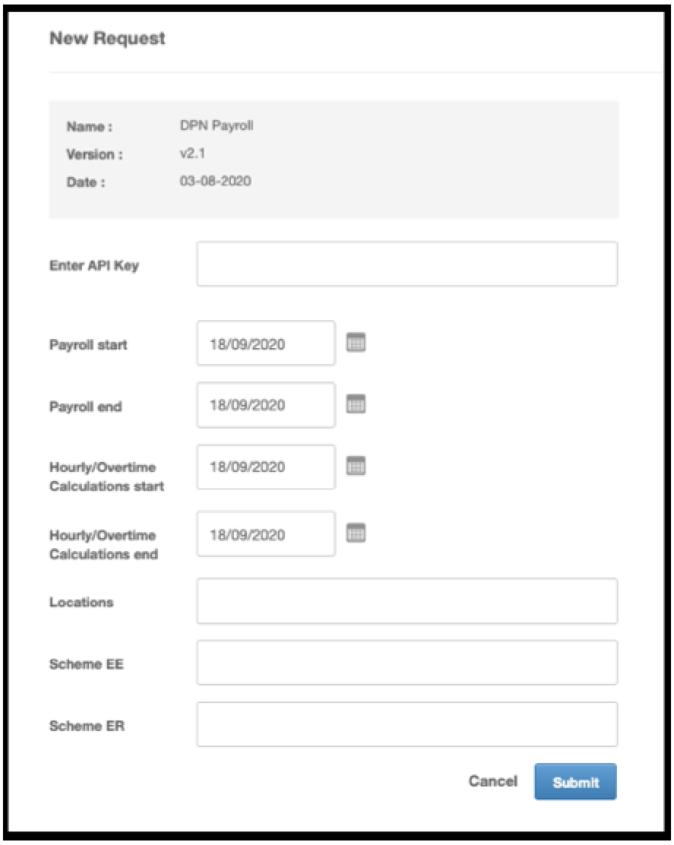
2. Once you have created the API key, click on the 'Plugins' tab:

3. Select the tab 'New Requests'

4. Select 'DPN Payroll'



5. You will be presented with this screen:



6. Paste in your API key in the API text box

7. **Select the Payroll start and end date -** These dates are used to define salary, payment and deductions along with any payments entered into the Ad-Hoc payments logbook.

8. **Payroll Start and End Date -** These dates are used to define salary, payment and deductions along with any payments entered into the Ad-Hoc payments logbook

9. **Hourly/Overtime Calculations Start and End date -** This is the date range we will pick up on overtime payments recorded under the Assignments section of the employees planner

10. **Locations -** Used to split/filter the report based on location, if left blank all employees will be populated under one export

11. **Scheme EE and Scheme ER -** You will need to enter the payment or deduction name (comma separated) for any payments/deductions you wish to be flagged with this status. If you're unsure on which payments/deduction names to

include under here please speak with your DPN representative

12. Click 'Submit' to submit your request.

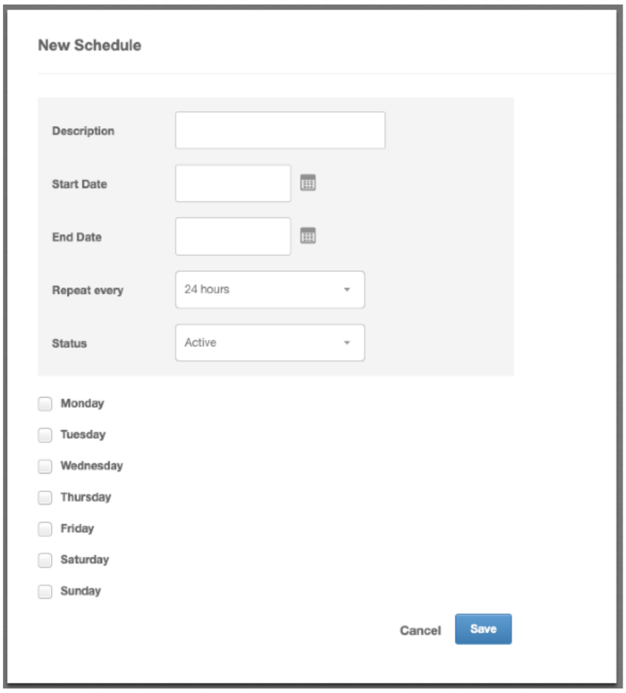
You will then find this in the 'Requests' tab - the most recent request will be at the top. It can take up to 2 minutes to be accepted.

Submitted Date	Completed Date	Status	Download	Repeat	
Thu, 20 Sep 2018	Thu, 20 Sep 2018	Completed	Download	Repeat	
Thu, 20 Sep 2018	Thu, 20 Sep 2018	Completed	Download	Repeat	
Wed, 19 Sep 2018	Wed, 19 Sep 2018	Failed	Download	Repeat	

If successful, you will be able to select the 'Download' button to download this report. If failed, select the red icon to view an error report - you can send this file over to our team at customerservices@peoplehr.com to review and assist.

5 Schedule to repeat automatically

Once you have made a plugin request, you can schedule this Plugin to run automatically. By clicking the 'Schedule' button on the 'Requests' page, you'll be directed to this screen:



Description - will be the name of the schedule, so you can see what it is set to at a quick look.

Start date - When you wish for the scheduling to start.

End date - You can leave this blank if you wish for this to be continuous.

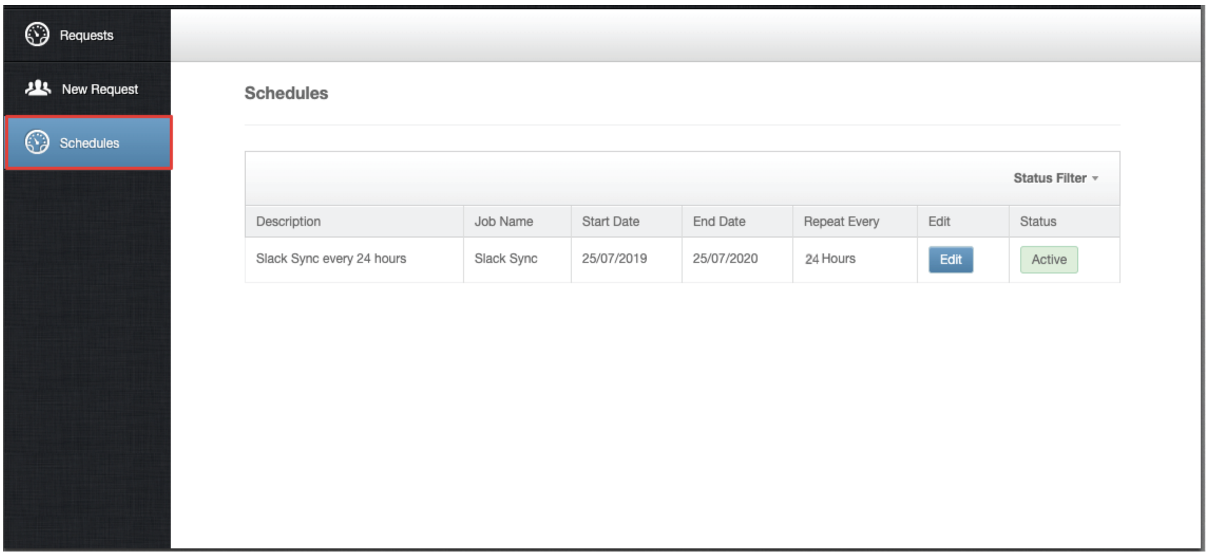
Repeat every - Select when you wish for this schedule to repeat.

Status - You can set this as inactive at any time.

Select the days you wish to run this on - you may not wish for notifications to push through on weekends for example.

Click 'Save'.

You can view all your schedules plugins in the 'Schedule' tab.



Thanks,

Customer Services Team.