

SAFEGUARD GLOBAL

Payroll User Guide

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Introduction

WelcometothePayrollUserGuide!This guide is designed to help you make the most of the Payroll feature. Below, you can explore the keyfunctionalities and workflows designed to help you manage payroll efficiently.Guide!

What is the Payroll feature?

Payroll is a feature of the Safeguard Global Platform designed to simplify payroll management, ensuring accurate and timely payments for employees. It provides a streamlined interface for submitting payroll changes, tracking entitlements, and managing payroll cycles.

With Payroll, you can:

- Add new pay elements such as bonuses, salary adjustments, benefits and so on for individual employees.
- **Review past payroll** cycles to see what was submitted and ensure accuracy.
- Import payroll data using Bulk Uploads for efficient processing of multiple changes.
- Export payroll data for reporting, audits, and compliance needs.

Accessing Payroll

You can access Payroll through the following methods:

- 1. Access Payroll directly by clicking this link Payroll
- 2. Or navigate to Payroll through the Safeguard Global Platform
- Navigate to **Payroll** via the grid menu icon in the top left corner.

Upon accessing the portal, the login page will appear (Figure – 1)

		Login Register
Welcome to Safeguard		
Global's login page.		1082
Hire and Pay workers from anywhere and support them everywhere.	Log in to Global Unity	A Second
	your password	
	2	
	Forgot password 3	
	Copyright Terms of Use Privacy Notice 10 20	017-2025 Safeguard World International Ltd.

Figure 1 – Login page



Login Instructions

- If you are a registered user:
 - Enter your email address, enter your password, and click Log In (Point 1 & 2, Figure 1)
- If you do not have an account or need to reset your password:
 - Click **Forgot Password** and follow the instructions (Point 3, Figure 1)

Navigating Payroll

- If you are accessing Payroll via the <u>Safeguard Global Platform</u>:
 - After logging in, click the **Payroll** tile (Point 1, Figure 2) or select **Payroll** from the grid menu icon in the top left corner (Point 1, Figure 3).



Figure 2 – Safeguard Global Platform







Getting Started: A Typical Payroll Workflow

To help you navigate the Payroll feature, let's walk through a standard payroll processing scenario. Whether you need to update payroll details, submit changes, or review past payrolls, this guide will take you through the most common steps to ensure smooth payroll management.

1. Review Open Payrolls

- Check the **Open Payroll** tab to see upcoming payroll cycles where changes can still be made.
- Identify employees requiring updates and make necessary adjustments before the cut-off date.

2. Making Payroll Changes

- Use **manual payroll changes** for individual updates, such as salary adjustments or onetime bonuses.
- Use **bulk uploads** when making multiple changes across several employees to save time.

3. Finalizing and Exporting Payroll Data

- Once changes are complete, you can use the filters and search functionality to verify specific payroll records.
- You can export payroll data for deeper analysis or to integrate it with other tools and systems you use

4. Tracking Past Payrolls

- After the cut-off date, payrolls move to the **Closed Payroll** tab where they are processed and paid.
- Use the past payrolls section to review historical payroll data and generate reports for audits or compliance purposes.



Navigating Payroll Cycles

Payroll cycles are categorized into two tabs:

- **Open Payroll** → Payroll cycles where changes can still be made before the cut-off date. Cut-off dates for such payroll cycles are still in the future. You can see the number of days left to submit changes in the Timeline next to the date.
- **Closed Payroll** → Payroll cycles that have passed the cut-off date and are now being processed or paid. No further changes can be made.

- Payroll			Signed in as pay_uat_guar	dian@demo.com. PA
Open Payrolls Closed Pay	rolls	Bulk Upload Payroll Changes ①	Export Payroll Changes 🔄 🗛	dd New Payment 📀
	Q Search by worker name or ID	Show Only Changes	Filter T	
•	Fri Feb 28 2025 6 days to submit chang	ges March 2025		
	Lene Havas	0000020574	Changes	
	Nassim Marino	0000023521	Changes 🗐	
	Balveer Spapens	0000024220	No Changes 🔳	
	Mirta Albertus	0000014940	No Changes 🛛 🗐	
	Ernestina Lipičnik	0000024093	No Changes 🛛 🗐	

Payroll cycles are organized in a timeline view, sorted by cut-off date. Scroll to navigate through payroll periods.

For each payroll cycle, you will see a list of workers that will get paid when the payment date comes.



Add a New Payroll Change

To make individual payroll changes:

• Click "Add new payroll change".

Sigr	ied in as clientexperiencedemo@safeguardglobal.com .
Bulk Upload Payroll Changes 🙏	Export Payroll Changes 🕑 Add New Payment 🔸
Show Only Changes	Filter Y

• Select the worker to which you want to add a payroll element.

	Add new payment		×
Bulk Upload Payroll	Select a wo	orker to receive a new payment	
Show On	Q Search by name or ID		
	Matthew Martin	dog_011	>
	Andrew Hart	dog_006	>
	Brandon Howard	dog_004	>
008	Gyorgy Bahringer	dog_008	>

• Select the payroll element you would like to add.



Bulk Upload Payroll	Add a new dog_011 Back	pa;	yment for Matthew Martin >
Chan On	Pay Element		
and on			\odot
	Benefit Other	>	Commission Earnings based on sales or performance, often a percentage of the revenue generated by the employee. Commission is a type of pay element that is often used in sales positions. It is a form of variable pay that is paid in addition to the monthly callor.
	Salary	>	Bonus
dog_008	Incentive	>	Additional compensation given to employees as a reward for performance or as a discretionary benefit. A bonus refers to a one-time payment made to an employee in addition to their regular salary or wages.
dog_001	Time off	>	Compensation For Time Of Service/Exit Bonus Payment made to employees upon leaving the company.
dog_009			which may reward their years of service.

• Enter **details** (effective dates, amount, etc.).

Add a new payment for Matt	thew Martin ×
Back	
Pay Element	
Bonus	×
Amount	
300	€ EUR ■
Date range From (optional) 03 May 2025	
Comment (optional)	
Add an optional comment	
Cancel	Submit

• Click "Submit".

Now your payroll change is added to the worker's payroll, and you will be able to see it in the corresponding payroll cycle in the Timeline view.



View and Modify Existing Payroll

To view and edit payroll for a worker:

1. Find the worker in the **Timeline view** using filters or search.

Open Payrolls Closed Payrolls		Bulk Upload Payroll Changes 🛧	Export Payroll Changes 🔄 Add New Payment 🔹
Q Sea	arch by worker name or ID	Show Only Changes	Filter 🖤
 Thu 16:00 	Feb 27 2025 7 days to submit changes 0 GMT+1 Australia 🏭 February 2025		
	Gyorgy Bahringer do	og_008	Changes
4	Nicholas Barnett do	og_001	Changes
4	Allison Fletcher de	og_009	No Changes
4	Tristan Khan da	og_005	No Changes
🔶 Fri F	eb 28 2025 8 days to submit changes		
• 16:00	0 GMT+1 Bulgaria February 2025		

2. Click the **blue button** next to the worker to access their payroll details.



3. Modify payroll by deleting, editing, changing the effective date, or adding a new payroll change.



Bulk Upload Payroll	Gyorgy Bahr	inger		
	Payroll Cycle February 2025	Cut-off Date Thu Feb 27 2025	Next Payment Dat	e
в	✓ 6 Permar	ent Entitlements		
	Childcare Allow	ance		1
	Amount			
9	300			\$ AUD 🏜
5	From		To (optional) 🛛	
	01 February 20	25	- Ongoing	
	Comment (optio	nal)		
	Add an optiona	I comment		
3	General Allowar	nce		
2	Amount			
	Add payment to	o this payroll cycle	Save C	hanges

4. Click **"Save"** to confirm the changes.

You can view payroll records for both past and future payroll cycles, but modifications can only be made to **Open Payrolls** with a cut-off date in the future.



Bulk Payroll Changes

For updating multiple workers at once:

1. Click "Bulk Uploads" in the menu.



2. Download the **Bulk Upload Template**, either as a blank file or pre-filled with all your workers and their worker IDs.

Bulk Upload Payroll	Bulk Upload Payroll Data Upload payroll changes using the Safegua	rd Payroll Upload Template
	Download empty template	Download template with workers
dog_008		
dog_001	Upload Payrol Click to browse or	I Upload Template file drag and drop the file here.
dog_009		

3. Enter the payroll changes in the template.

	В	С	D	E	
	Employee Name	Pay Element	Amount	Effective From	Effective [•]
5	e.g. Juan Pérez (optional)	e.g. Monthly Salary	e.g. 12.34	e.g. 01 October 2024	e.g. 02 Oc
	Matthew Martin	Food Voucher	100	01 May 2025	
	Andrew Hart	Food Voucher	100	01 May 2025	
	Brandon Howard	Food Voucher	100	01 May 2025	
	Gyorgy Bahringer	Food Voucher	100	01 May 2025	
	Michael Paul	Food Voucher	100	01 May 2025	
	Tara Miller	Food Voucher	100	01 May 2025	
	Scott Brown	Food Voucher	100	01 May 2025	
	Tanya Hodges	Food Voucher	100	01 May 2025	
	Nicholas Barnett	Food Voucher	100	01 May 2025	
	Ronald Green	Food Voucher	100	01 May 2025	
	Tristan Khan	Food Voucher	100	01 May 2025	
	Allison Fletcher	Food Voucher	100	01 May 2025	



4. Upload the completed file back into the Payroll Application.



5. Review the payroll changes that were found in your template file.

Bulk Upload Payroll Changes Review Upload	d Changes	Discard and Close 🕢 Confirm and Submit Changes 🗦
SG_Payroll_Upload_Template_with_workers-2.xlsx	Number of Workers Entitlement Changes 12 12	
	Please review the changes below, and submit wh	en ready.
• •	Thu May 29 2025 98 days to submit changes	
	Matthew Martin dog_011 1 Cł	nanges 🗧
	Andrew Hart dog_006 1 Cr	nanges
	Brandon Howard dog_004 1 Cr	nanges
	Ronald Green dog_007	nanges

6. Click "Confirm and Submit Changes" when you are ready.



Exporting Payroll Changes

To export payroll changes:

1. Click **"Export Payroll Changes"** in the top-right corner.

ulk Upload Payroll Changes 🙏	Export Payroll Changes 🕁	Add New Payment 🔸

2. Select whether to export only changed entitlements or all payroll entitlements.



3. Select the date range for the payroll data you want to export.

rom				То			
20 Aug	ust 202	4	- 1	20	20 February 2025 👘		
						Clear	
<		Au	gust, 20	024		>	
Мо	Ти	We	Th	Fr	Sa	Su	
29	30	31	1	2	3	4	
5	6	7	8	9	10	11	
12	13	14	15	16	17	18	
19	20	21	22	23	24	25	
26	27	28	29	30	31	1	

4. Click **"Export Data"** to download the file.



Types of Payroll Entitlements

Payroll entitlements are categorized into several types based on their nature and purpose. Below is an overview of the key categories:

1. Salary Entitlements

- These represent recurring salary payments such as:
 - Annual Salary
 - Monthly Salary
 - Hourly Wage
- These payments are typically ongoing and repeat each payroll cycle.

	(
5	Annual Salary
~	The total amount of money an employee earns in a year,
>	deductions. Annual Salary refers to the Total gross
	additional allowances.
>	Monthly Salary
	The total compensation an employee earns each month,
>	typically expressed as a gross amount before taxes and deductions.
	Hourly Salary
1	Compensation calculated based on the number of
	> > > >

2. Incentive Payments

- One-time or performance-based payments, including:
 - Commissions
 - Bonuses (e.g., sign-on bonuses, performance bonuses)



• These are usually awarded based on performance criteria or agreements.

Bonus		
Benefit	>	Commission
Denent		Earnings based on sales or performance, often a percentage of the revenue generated by the employee.
Other	>	Commission is a type of pay element that is often used in sales positions. It is a form of variable pay that is paid in addition to the monthly salary.
Salary	>	Bonus
Incentive	>	Additional compensation given to employees as a reward for performance or as a discretionary benefit. A bonus refers to a one-time payment made to an employee in addition to their require salary or wages
Time off	>	employee in addition to their regular salary or wages.
	ć	Compensation For Time Of Service/Exit Bonus Payment made to employees upon leaving the

3. Benefits

- Non-cash or additional financial benefits provided to employees, such as:
 - Vouchers
 - Allowances
 - Insurances
- These may be ongoing or provided under specific conditions.

Restaurant Voucher					
Benefit	>	Wellness Allowance Financial support provided for health and wellness			
Other	>	activities or products, such as gym memberships or fitness classes.			
		Transportation Vouchers			
Salary	>	Coupons or cards that can be used for public transportation or other travel expenses.			
Incentive	>	Restaurant Voucher			
		Coupons or cards redeemable at restaurants, often provided as part of a benefits package.			
Time off	>	Accommodation Allowance			
		Money provided to cover the cost of housing or rent			

4. Time Off Pay Elements

- Payments related to employee leave and overtime, including:
 - Sick Leave Days
 - Vacation Days
 - Paid Time Off Days
 - Overtime Hours



• These elements help track compensated time off and extra work hours.

Paid Time	Off D	aya	×
Benefit	>	Sick Leave Days	
Other	>	they are ill or injured, without losing pay. Sick leave is often mandated by law or provided as part of an employer's benefits package.	
Salary	>	Vacation Days	
Incentive	>	Predefined days off from work that employees are entitled to for relaxation, travel, or personal time. These days are usually part of the benefits package offered by employers and may accrue over time based on years of service	
T : ((based on years of service.	

5. Other Entitlements

- Additional payroll elements that do not fit into the above categories, such as:
 - Pension Contributions
 - Wage Garnishments
 - Expenses
 - Other Variable Pay

These can be one-time payments or recurring, depending on policy.

Expenses		
Benefit	>	Pension Contribution Employer contributions to an employee's retirement fund or pension plan.
Other	>	Recovery / Salary Adjustment
Salary	>	Adjustments made to correct or align salary amounts, possibly due to errors or changes in compensation structure.
Incentive	>	Wage Garnishment A legal process where a portion of an employee's wages is withbald by an employer to pay off a debt or
Time off	>	obligation.
		Other Variable Pay
		Compensation that varies based on performance,



Types of Entitlement Behavior

All payroll entitlements fall into one of the following categories based on their duration and recurrence:

1. Permanent Entitlements

- These are **ongoing payments** that automatically repeat each month unless manually removed or changed.
- Example: A fixed **monthly salary** or **recurring benefits** like insurance.

2. Temporary Entitlements

- These apply for a specific payroll cycle and **do not carry over** to the next month.
- Example: A one-time bonus or a temporary allowance provided for a single payroll period.

3. Unit Entitlements

- These are a special type of **temporary entitlement**, measured in **time-based units** (e.g., hours or days).
- Example: Sick leave days, overtime hours, or vacation days that determine pay adjustments based on time worked or taken off.

This classification ensures payroll elements are structured and managed efficiently, allowing for accurate calculations and payments.





Frequently Asked Questions (FAQ)

1. When will payroll changes take effect?

• Payroll changes take effect based on the selected "effective from" date and the cut-off date for the payroll cycle.

2. Can I make changes to a payroll cycle after the cut-off date?

• No, once the cut-off date has passed, the payroll moves to the Closed Payroll tab and no further changes can be made.

3. How can I update payroll details for multiple employees at once?

• Use the Bulk Uploads feature to submit payroll changes for multiple employees in a single action.

4. What should I do if an upcoming payroll contains incorrect data?

• You can still make changes to the upcoming (open) payroll cycles before the cut-off date comes.

5. Can I retrieve past payroll records?

• Yes, all processed payrolls are stored in the Closed Payrolls tab, where you can review and export historical payroll data.

Support and Assistance

For any issues or questions refer to the <u>Help Center</u>.

