



# TCI Infor Infinium Customer Newsletter

Fall 2018

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## Welcome to Your Infinium Newsletter

TCI, the only Certified Infor Infinium Business Partner, is dedicated to providing you with a newsletter featuring tips and techniques for your Infor Infinium software systems along with interesting articles regarding TCI and Infor.

We felt that with such a large customer base, a newsletter could effectively provide you with useful information and links to valuable resources. Our goal is to grow this newsletter into a helpful, informative tool for you. We welcome all input for future issues. Jerry Daniel | JDaniel@tcipro.com | 502-314-3733

## Infinium in the Cloud - Finally Affordable

TCI is now offering affordable cloud-based, remote-hosting of Infinium in a world-class data center. All of your IBM and Infinium upgrades will happen automatically including all Infinium modifications retrofitted. Additionally featured is 24/7/365 Infinium and iSeries Daily Operational Support. The facility includes state-of-the-art security, N+1 redundancy in all critical systems. Experience extremely fast, low-latency internet bandwidth. Backups and Disaster Recovery are included. We customize solutions (as required) for every client to reduce cost and maximize return on investment. If you would like to discuss customized options, call me at 502-314-3733. I hope you enjoy the newsletter. Regards: Jerry Daniel | JDaniel@tcipro.com

## Infinium Payroll Tip from Mike Miller Payroll Preparation for Year End

For payroll departments across the country, the final 2 or 3 weeks of December and the first 2 or 3 weeks in January can be incredibly busy and stressful. In addition to closing the 2018 payroll year and kicking off 2019, the final 2018 tax reports and filing must be completed and submitted.



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If you have any questions regarding subject matter within this newsletter, please e-mail [jdaniel@tcipro.com](mailto:jdaniel@tcipro.com).

One way to reduce your stress level is to balance your payroll throughout the year. Many organizations include payroll balancing as part of their payroll quarter end process. This gives you time to find and correct any issues early in the year, before the year end rrush.

There are a number of standard Infinium reports that will help you with the balancing process. These include Year-to-Date Payroll Registers, Year-to-Date Supplemental Registers, Quarter-to-Date registers, Quarterly Audit reports, Quarterly Wage reports, and the W-2 review list. The Infinium Tax Liability reports are also valuable tools for your balancing process.

One very effective way to use these reports is to set up an annual balancing spreadsheet and then enter the appropriate quarterly totals into the balancing spreadsheet at the end of each quarter. Not only does this approach identify any out of balance situations early in the year, but it provides a running balance for all 4 quarters. This approach is helpful whether you report and file your own taxes or outsource the reporting and filing.

You can e-mail Mike regarding this at [MMiller@tcipro.com](mailto:MMiller@tcipro.com)

## Infinium Payroll Tip from Mike Miller

### Preventing Infinium Self Service Open Enrollment selection mistakes from Mike Miller

It's time to review your preparedness for the 2019 Open Enrollment process. Is your project team trained on the latest Infinium Benefits Self-Service releases? Have you reviewed the new Self-Service security enhancement, and the enhanced view of enrollment options for employees who have declined coverage in the current year? Are they prepared to make this Open Enrollment period more efficient and cost effective than in the past?

TCI's support of the Infinium Benefits Self-Service application has grown to include helping to configure many of the standard and effective, Infinium Self-Service edits that deal with potential enrollment mistakes that employees might make during their open enrollment process. These edits include:

- Confirming that only qualified Dependents may enroll in your Health plans.
- Setting the Age Limits for Dependents to be eligible to enroll in selected coverage.
- Ensuring that the selection of HSA coverage also includes selection of a High Deductible medical plan.



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- Ensuring that, if your plans include this type of restriction, an employee may not select Voluntary Life insurance for a Spouse or Child without also selecting Voluntary coverage for themselves.

These and other features and edits are included within the Infinium Benefits Self Service application. However, we have found that sometimes staff turnover leads to a situation where your team isn't aware of these features and they spend excessive amounts of time in after-the-fact enrollment editing. We can help by providing refresher training and, if necessary, configuring and testing the edits on your 2019 Enrollment form

We have also been able to help some Infinium customers with other less standard edits. These have included:

- Requiring the employee to record their tobacco usage status. This information is used later during the enrollment process if your plans include a rate based on tobacco usage.
- Recording whether or not an employee's spouse could have elected to be covered by the spouse's employer. In cases where the spouse could have been covered by their employer, we added an edit to disallow the coverage of the Spouse under your employee's medical coverage.
- Recording whether or not an employee is enrolled in Medicare coverage and, if they are, not allowing them to enroll in your HSA plan.
- Adding an edit that requires employees to make a selection from every "Box" on their enrollment form. This provides a positive audit trail of the selections made by the employee. This has proven helpful in those cases where an employee claims to have made a selection but there is no enrollment record to support the claim.

You can e-mail Mike regarding this at [MMiller@tcipro.com](mailto:MMiller@tcipro.com)

## Infinium GL Tip from Dan Rabold

### Preparing for Infinium GL 2018 Year End Processing

TCI's Dan Rabold has a ten year history with Infor Infinium Technical Customer Support. Dan is offering some year-end tips in this quarter's newsletter.

Dan first suggests remembering to set up an accounting year code value (AYR) for the new year. Leaving the company blank creates an AYR that is valid for all companies to use. You can also set up the year for specific companies if you want, but you must have one file where you have left the company blank.

Set up period controls for the new year using the *Work With Period Controls* option. If you attempt to post in the new year without doing this step, you will receive an error message. You must set up period controls for each company. GL will copy the prior year period controls, and update the period end dates. \*\*\* Be sure to enter through the screen. If you use F12, you will exit without saving the period control.

Make sure all accounts have been assigned the correct Account Type: Asset; Liability; Income; or Expense. Balances for accounts classified as I and E will be offset by the year end journal with the net effect being posted to retained earnings. Balances for accounts classified as A and L will be rolled forward to the Starting Balance for the next year.

For more details regarding GL year end processing, you can e-mail Dan regarding this at [drabold@tcipro.com](mailto:drabold@tcipro.com).

## Infinium PL Tip from Dan Rabold

### Steps to Set Up a Calendar and Period Controls for a New Year in Infinium PL

1. Within Controls, select *Work with codes*. Select the AYR code with a 5. If a new year is not listed, use F6 to create it. If it is listed make sure it is active.
2. Within Controls select *Work with calendars*. Create a calendar for the new year using the same calendar name assigned at the company controls, page 2.

(If you use a different calendar name from year to year you must go into the base information of your company and change the default to the new calendar name.)

When creating the calendar, make sure you enter through the screen listing your period ending dates to fully save the new calendar. Also please note that all calendars with the same name need to remain Active.

3. Within the *Work with companies* option, select the company with a 15 to drill down to the division. Select the division with a 19 to create your period controls. Enter through the listing of the periods.
4. Change the period in *Division Controls*. Select the division with a 2 to change and enter to the 2nd page. On screen 2, change the default year and period to the correct values.

You can e-mail Dan regarding this at [drabold@tcipro.com](mailto:drabold@tcipro.com).

## Infinium HR/PY Tip from Brenda Bennett

### Position Default File

Have you capitalized on the Position Default file in Infinium HR/PY? This enhancement was brought in a few years back to help employers shortcut some manual entry. It is a big time saver for payroll departments as these fields are required on an employee's record before they can get paid.

Instead of populating payroll data on the employee record manually, the file defaults values for *Cycle*, *Auto Pay Group*, *Current State*, *SUTA state*, etc. This occurs at new hire and transfer transactions. There is a flag on employer control that initiates the use of this file.

Furthermore, the Position Default File (PRPDF) contains a lot of additional fields including what accrual codes for Vacation/Sick should be assigned to the employee in this position. Although these fields are not on the standard screen as there are no programs currently developed to populate basic data or the accrual audit file PRPTH, TCI could work with you on implementation. This way an employee's accrual codes would not be populated with the wrong code for his/her position or left blank. This causes the need for manual calculations to correct or adjust vacation or sick balances.

Tying default values to position is a great way to be sure the employee's data is accurate!

For more details you can e-mail Brenda at [BBennett@tcipro.com](mailto:BBennett@tcipro.com)

## For More Information



**Jerry Daniel**  
Director of Sales, Infor  
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