



Microsoft Dynamics GP Web Client Employee Self Services



Keith Schmidt
Senior Customer Care Representative / Consultant



Integrity Data's leadership in human capital management for 20 years

- ➡ More than **8,000 organizations** worldwide use our technology to improve businesses processes, specifically for payroll
- ➡ Engaged by Microsoft to author **payroll and human resources** upgrades to the ERP system known as Microsoft Dynamics® GP

Original authors of:

- Core Payroll Extensions
 - Overtime Rate Manager
 - Deductions In Arrears
 - Payroll Integration to Payables
- HRP Extended Pack
 - PTO Manager
 - Advanced Payroll
 - Advanced HR
 - Benefit Self Service

MICROSOFT
DYNAMICS GP

PARTNER

20 YEARS!

Agenda

- Navigation
- Employee Profile
- W-4 selections
- Direct Deposit Information
- View W-2s (in GP 2016 - 2018)
- View Past Paystubs
- Benefits
- Employee Skills, Training, Licenses and Certification
- Integrity Data Comprehensive Leave Manager & Paycheck “What If” Calculator
- Manager’s My Team
- Future Webinar Topics: Timecards, Benefit Enrollments

A photograph of two women in business attire looking at a laptop screen. The image is dimmed and serves as a background for the slide. A large orange horizontal band is overlaid across the middle of the image, containing the title text.

Microsoft Dynamics GP Web Client Employee Self Services

Microsoft Dynamics GP Web Client Employee Self Services -> Home Page

Time Management ...

TIMECARDS

0	0	0	0	0.00	0.00
Saved	Rejected	Pending User Action	Approved	Vacation Balance	Sick Leave Balance

I NEED TO

- Enter Time for a Pay Period
- Recall a Submitted Timecard
- View my Paystubs
- View my Benefits
- View/Update my Skills and Training
- View/Update my Profile
- View/Print my W2

Microsoft Dynamics GP Web Client Employee Self Services

Microsoft Dynamics GP Fabrikam

HR & Payroll

Area Pages ^

- HR & Payroll
- Applicants

Cards ...

- Self Services
 - Benefits View
 - Employee Direct Deposit
 - Employee Profile
 - W4 Employee Withholding
 - Benefits View (enhanced)
 - Employee Skills, Training, Licenses and Certifications



Employee Profile – Personal information

Employee Profile ✕

Save ✖ Cancel ? Help

Actions Help

Employee ID: BARR0001
Name: Adam Barr

Personal | Emergency Contacts | Dependents | Position History

Name

First: Adam
Middle:
Last: Barr
Suffix:
Preferred Name:
Address ID: PRIMARY ▼
Street: 654 Elm Ave
City: Wauwatosa
State: WI
ZIP Code: 59923 County:
Country: USA

Personal Information

Soc Sec Number: 944-22-9198
Hire Date: 10/23/2022
Birth Date: 10/07/1986
Gender: Male ▼
Ethnic Origin: White ▼
Marital Status: Single ▼
Spouse's Name:
Contact Details
Home Phone 1: (414) 555-0120 Ext. 0000
Home Phone 2: (414) 555-0111 Ext. 0000
Home Phone 3: (414) 555-0199 Ext. 0000
Home Fax: (414) 555-0193 Ext. 0000
Email 1:
Email 2:
Messenger:

Employee Profile – Emergency Contacts

Employee Profile ✕

Save ✖ Cancel ? Help

Actions Help

Employee ID: BARR0001
Name: Adam Barr

Personal **Emergency Contacts** Dependents Position History

Names by State ?

Contact	Relationship	Home Phone	Work Phone	Ext
Terry Adams	Cousin	(414) 555-0128	(414) 555-0189	65
Holly Holt	Sister	(414) 555-0146	(414) 555-0146	
		(000) 000-0000	(000) 000-0000	



Employee Profile – Dependents

Employee Profile ✕

Save ✖ Cancel ? Help

Actions ▼ Help

Employee ID:

Name:

Personal | Emergency Contacts | **Dependents** | Position History

Names by Date of Birth ⌵ ⌵

Relationship	First	Middle	Last	Date of Birth
Self	Adam		Barr	10/07/1986



Employee Profile – Position History

Employee Profile

Save Cancel Help

Actions Help

Employee ID: BARR0001
Name: Adam Barr

Personal Emergency Contacts Dependents **Position History**

Position By Date Effective

Date Effective	Position	Department	Supervisor
07/01/2024	Technician	Installation	
04/12/2027	Technician	Installation	Support Manager



W4 – Employee's Withholding Certificate

W4 - Employee's Withholding Certificate

Clear Help

Actions Help

Employee ID: BARR0001
Employee Name: Adam Barr
Federal Status: Married

Federal Withholding
Number of Allowances: 1
Additional Amount: \$0.00

History W-4

Form **W-4**
Department of the Treasury
Internal Revenue Service

Employee's Withholding Certificate Allowance
Whether you are entitled to claim a certain number of allowances or from Withholding subject to review by the IRS. Your employer may be required to send a copy this form to the

OMB No. 1545-0074
2027

1 Name: First name and middle initial. Adam . Last name Barr 2 Your social security number: XXXXXXXXX

Home address (number and street or rural route)
654 Elm Ave
City or town, state, and ZIP code
Wauwatosa, WI 59923

3 Single Married Married, but withhold at higher Single rate
Note. If married, but legally separated, or spouse is a nonresident alien, check "Single" box.

4 If your last name differs from that shown on your social security card check here.
You must call 1-800-772-1213 for a replacement card.

5 Total number of allowances you are claiming (from line H or from the applicable worksheet on page 5 1

6 Additional amount, if any, you want withheld from each paycheck 6 \$0.00

7 I claim exemption from withholding for 2027 and I certify that I meet BOTH of the following conditions for
(i) Last year I had a right to a refund of ALL federal income tax because I had no tax liability, AND
(ii) This year I expect a refund of ALL federal income tax because I expect to have NO tax
If you meet both conditions, choose Exempt here. 7 Not Exempt

Under penalties of perjury, I declare that I have examined this certificate to the best of my knowledge and belief, it is true, correct, and

Employee's signature: _____ Date: _____
Type your name as Adam Barr

The W-4 form displayed on this page is not necessarily an accurate representation of the federal form, but all the information required to this form a legal record of your tax withholding changes is included [Form W-4](#) on IRS.gov

Employee Direct Deposit

Employee Direct Deposit

Clear Stop Deposit **Save** Help

Actions Help

Employee ID: BARR0001
Name: Adam Barr

Direct Deposit Status: Active
Remainder Line Number: 1

Line	Bank Number	Account Number	Checking/Savings	Amount	Percent
1	123456780	9876	Checking	\$0.00	100%

Move Up
Move Down

Add Account Remove Account



W2 - Wage and Tax Statement

HR & Payroll

Area Pages ^

- ▶ Recruitment Reports
- ▶ Work Environment Reports
- ▶ Professional Development Reports
- ▶ Organizational Employment Reports

All Human Resources Reports List

Payroll Posting Accounts

Payroll Report List

Microsoft Dynamics GP Reports

Smartlist Favorites

Paystubs

W2 - Wage and Tax Statement

View Print

Actions Reports

W2 - Wage and Tax Statement (read only) ▾

Show results

+ Add Filter ▾

Apply Filter

<input checked="" type="checkbox"/>	▼ Year	Wages, Tips, Other Comp	Federal Income Tax Withheld	Social Security Wages	Social Security Tax Withheld	Medicare Wages & Tips
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Employee Paystubs

HR & Payroll

Area Pages ^

- Employee Reports
- Recruitment Reports
- Work Environment Reports
- Professional Development Reports
- Organizational Employment Reports
- All Human Resources Reports List
- Payroll Posting Accounts
- Payroll Report List
- Microsoft Dynamics GP Reports
- Smartlist Favorites
 - Paystubs**
 - W2 - Wage and Tax Statement
- Historical Timecards
- Current Timecards
 - My Saved
 - My Rejected
 - My Submitted
 - My Team
 - My Delegates
 - All

View Custom Date Print

Actions Restrictions Reports

Screen Output - Reprint Pay Statement

Print Send To

Completed 1 Page Page 1

Paystubs (read only)

Show results

+ Add Filter

Apply Filter

<input type="checkbox"/>	Check Date	Check Number	Gross Wages	Federal Tax	FICA
<input checked="" type="checkbox"/>	12/1/2028	11529	\$1,395.39	\$115.81	
<input type="checkbox"/>	11/1/2028	11504	\$1,395.39	\$115.81	
<input type="checkbox"/>	10/1/2028	11479	\$1,395.39	\$115.81	
<input type="checkbox"/>	9/1/2028	11454	\$1,395.39	\$115.81	
<input type="checkbox"/>	8/1/2028	11429	\$1,395.39	\$115.81	
<input type="checkbox"/>	7/1/2028	11404	\$1,395.39	\$115.81	
<input type="checkbox"/>	6/1/2028	11379	\$1,395.39	\$115.81	
<input type="checkbox"/>	6/1/2028	11594	\$1,300.00	\$375.77	
<input type="checkbox"/>	5/1/2028	11354	\$1,395.39	\$115.81	
<input type="checkbox"/>	4/1/2028	11329	\$1,137.79	\$78.72	
<input type="checkbox"/>	3/1/2028	11304	\$1,395.39	\$115.81	
<input type="checkbox"/>	2/1/2028	11279	\$1,395.39	\$115.81	
<input type="checkbox"/>	1/1/2028	11254	\$1,395.39	\$115.81	
<input type="checkbox"/>	1/1/2028	11589	\$1,000.00	\$268.27	
<input type="checkbox"/>	12/1/2027	11229	\$1,395.39	\$115.81	
<input type="checkbox"/>	11/1/2027	11204	\$1,395.39	\$115.81	
<input type="checkbox"/>	10/1/2027	11179	\$1,395.39	\$115.81	
<input type="checkbox"/>	9/1/2027	11154	\$1,395.39	\$115.81	
<input type="checkbox"/>	8/1/2027	11129	\$1,395.39	\$115.81	
<input type="checkbox"/>	7/1/2027	11104	\$1,395.39	\$115.81	
<input type="checkbox"/>	6/1/2027	11079	\$1,395.39	\$115.81	
<input type="checkbox"/>	6/1/2027	11584	\$1,200.00	\$338.27	
<input type="checkbox"/>	5/1/2027	11054	\$1,395.39	\$115.81	

***** Employee Paystub *****

Fabrikam, Inc.

Barr, Adam
654 Elm Ave

Wauwatosa WI 59923

Employee ID: BAR

Check Number: 115

Check Date: 12/

Pay Period Start: 12/

Pay Period End: 12/

Current Amount

Hourly Pay Code \$16.10 86.67 \$1,395.39

GROSS PAY \$1,395.39

401K 401(k) Deduction \$55.82

MED Medical Flex \$5.00

TOTAL DEDUCTIONS \$60.82

Federal Tax \$115.81

Wisconsin \$71.88

FICA Social Security Tax \$86.21

FICA Medicare Tax \$20.16

TAXES WITHHELD \$294.06

NET PAY \$1,040.51

401K 401(K) \$2.79

INS Insurance Premium \$49.36

TOTAL BENEFITS \$52.15

Direct Deposit Information

Bank	Account	Amount	Time Off Ba.	Vacation Ba.	Sick Balance

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Benefits View

Benefits View

OK Help

Actions Help

Employee ID:

Employer Contributions All Benefits Active

Code	Description	Status	Frequency	Method	Amount or %
401K	Retirement Plan	Active	Semimonthly	Percent of Deduction	5.00%
INS	Insurance Premium	Active	Semimonthly	Fixed Amount	\$49.36

Employee Contributions

Code	Description	Status	Frequency	Method	Amount or %
401K	Retirement Plan	Active	Semimonthly	Percent of Gross Wages	4.00%
EPU	Employee Purchases	Active	Semimonthly	Fixed Amount	\$0.00
MED	Medical Flex	Active	Semimonthly	Fixed Amount	\$5.00



Benefits View (enhanced)

Benefits View ↗ ✕

OK Help Add Note

Actions Help

Employee ID: BARR0001 View: Current Pending
Name: Adam Barr Benefits: Active All

Code	Description
401K	Retirement Plan
EPU	Employee Purchases
INS	Insurance Premium
INS1	Insurance (+1 dependent)
MED	Medical Flex

Benefit Type: Retirement

Benefit Description: Retirement Plan

Benefit Effective Date: 06/18/2023

Benefit End Date:

Frequency:

Percent of Deduction: 5.00%

Inactive

Frequency: Semimonthly

Fixed Amount: \$0.00

Inactive

Last Changed User:

Last Changed Date:



Employee Skills, Training, Licenses and Certification

Employee Skills, Training, Licenses & Certifications

Save Cancel Help

Actions Help

Employee ID: BARR0001
Name: Adam Barr

Education	Tests	Skills	Training History	Certifications	Licenses
License	Type	Issued By Agency	Issued By State	Original Issue Date	Date Renewed
User-Defined 1	User-Defined 2	User-Defined 3	User-Defined 4	Expiration Date	Status



Integrity Data Comprehensive Leave Manager Employee Leave Summary

Employee Leave Summary

OK Clear Redisplay Print Go To Print Help Add Note

Actions Options Go To File Help

Employee ID: BARR0001
Name: Barr, Adam
Method: Calendar
Year: 2027
Transaction Dates From:
To:
View: All Balances Only

Leave Code	Description	Inactive	Leave Amounts				
			Earned	Taken	Adjusted	Remain	Pending
PTO	PTO Plan	<input type="checkbox"/>	6.16	0.00	80.00	86.16	0.00
Totals:			6.16	0.00	80.00	86.16	0.00

by Employee ID



Integrity Data Comprehensive Leave Manager Employee Leave Transactions

Employee Leave Transactions
↗ ✕

OK
Redisplay
Clear
Print
Help
Add Note

File
Help

Employee ID:

Leave Code:

Leave Type:

Method: Transaction Dates From: To: Show 0.00 Transactions

Year:

Total Earned: 6.16

Total Taken: 0.00

Total Adjusted: 80.00

Current Balance Remaining: 86.16

Current Balance Pending: 0.00

Seq	Created	Taken From	Taken To	Source	Audit Trail Desc	Check #	Transaction Amounts				Balance	Created By
							Earned	Taken	Adjusted	Pending	Remaining	
3	04/12/2027	0/0/0000	0/0/0000	Accrued	UPRCC00000082	11656	3.08	0.00	0.00	0.00	86.16	sa
2	04/12/2027	0/0/0000	0/0/0000	Accrued	UPRCC00000081	11635	3.08	0.00	0.00	0.00	83.08	sa
1	01/01/2027	1/1/2027	1/1/2027	Adjusted	Converted Balance		0.00	0.00	80.00	0.00	80.00	sa



Integrity Data Paycheck "What If" Calculator

Paycheck 'What If' Calculator

OK Clear **Calculate** Help Add Note

Actions Help

Employee ID: BARR0001 Mass Gross Up

Name: Barr, Adam

Batch ID:

Batch Comment:

Pay Information

Include	Code	Hours	Rate	Begin Date	End Date	Gross Up
<input checked="" type="checkbox"/>	HOUR	80.00	\$16.10	04/12/2027	04/12/2027	<input type="checkbox"/>
<input type="checkbox"/>	HOUR2	80.00	\$16.50	04/12/2027	04/12/2027	<input type="checkbox"/>
<input type="checkbox"/>		0.00	\$0.00			<input type="checkbox"/>

Federal Tax Information

Filing Status: Married

Exemptions: 1

Addl. Withholding: \$0.00

Est. Withholding: \$0.00

State Tax Information

State: WI

Filing Status: Married

Dependents: 0

Addl. Allowances: 0

Addl. Withholding: \$0.00

Est. Withholding: \$0.00

Personal Exemptions

Self

Spouse

Blind

Blind Spouse

Over 65





Spouse Over 65

Special Allowance


Deduction Information

Include	Code	Description	Percent	Amount	Gross Up
<input type="checkbox"/>	EPU	Employee Purchases	0.00%	\$0.00	<input type="checkbox"/>
<input type="checkbox"/>	INS1	Insurance (+1 dependent)	0.00%	\$47.95	<input type="checkbox"/>
<input type="checkbox"/>	MED	Medical Flex	0.00%	\$5.00	<input type="checkbox"/>
<input type="checkbox"/>			0.00%	\$0.00	<input type="checkbox"/>

My Team (Managers)

 Employee Profile  Summary
 Skills and Training  Transactions

Employee Leave

 My Team (read only) ▼

<input type="checkbox"/>	Group ▲	Employee ID ▲	Last Name	First Name	Level ▲	Supervisor
<input type="checkbox"/>	0	BARR0001	Barr	Adam	0	FLOO0001
<input type="checkbox"/>	1	BARB0001	Barbariol	Angela	1	BARR0001
<input checked="" type="checkbox"/>	2	DIAZ0001	Diaz	Brenda	1	BARR0001
<input type="checkbox"/>	3	HARU0001	Harui	Roger	1	BARR0001
<input type="checkbox"/>	4	TIAN0001	Tiano	Mike	1	BARR0001



Timecards

- ▲ Historical Timecards

 - My Team

 - My Delegates

 - All

- ▲ Current Timecards

 - My Saved

 - My Rejected

 - My Submitted

 - My Team

 - My Delegates

 - All

Timecards Pending Approval

HRP Workflow Pending Approval



Benefit Enrollment

- ▲ Benefit Enrollments

 - All

- ▲ Administer Benefit Enrollments

 - All



#PayrollAndAfraid #GPUGSummit

CC

DAN NEEDS **YOUR** HELP!

#GPUGSummit is just around the corner and Dan needs your help to get there.

You can help whether you're attending Summit or not.

Just fill out the form to help Dan find his way to Phoenix and get entered to win our Payroll Survival Kit!

integrity-data.com/helpDan

**PAYROLL
AFRAID &**

Next Session

[Tuesday, November 13 @ 1:30 PM](#) – full hour session

Integrity Data's Payroll Year-End for Dynamics GP

In one information-packed session, get the latest year-end content for:

- Dynamics GP Payroll: What changed? What's coming? Payroll Tasks, Checklist and Troubleshooting year-end discrepancies
- Integrity Data's GP Payroll Solutions
- Integrity Data's ACA Compliance Solution and ACA in GP

Resources

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integrity-data.com/software/comprehensive-leave-manager/



Read our
blog



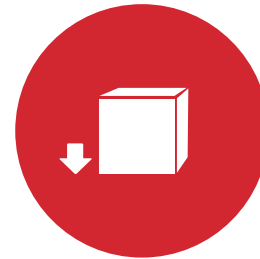
Watch
videos



Customer
stories



Check the ROI
for YOU



Download
software



Download
documentation

Follow us   

ACA Compliance and Reporting

Payroll Processing

- Negative Payroll Transactions
- Negative Deductions
- Mid Pay Period Rate Changes
- Overtime Hours Rules

Payroll Accounting

- Employee Accounts and Splits
- FTE Manager

Benefits Management

- Leave Management
- Enhanced Retirement Plans
- Life Insurance Tax Calculator

Payroll Productivity

- Employee E-mail Suite
- Paycheck "What If" Calculator

Tailor-made Solutions

Stellar Support



Thank you

Learn more

integrity-data.com/
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Your people. Our priority.®