

Merlot Aero Limited

Merlot Aero Suite Crew Payroll-User Guide



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Modified By	Date	Version	Changes
Darryl Horton	November 22 nd 2013	1.0	First Draft
Doug Buckmaster	November 25 th 2013	1.1	Spelling and Grammar
Cherie Elpel	February 5 th 2014	1.2	New Screenshots, Edit

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What are merlot's crew applications?

The merlot.aero suite is a complete organizational management solution offering all aspects of airline resource planning and control to ensure the safety, efficiency and quality of your crew and operational environment.

merlot.aero is a comprehensive suite of applications, covering all aspects of your airline needs. It has been developed with the entire business process in mind; including the customer process from the moment ticket sales are planned, until the point the passenger reaches their destination.

For your convenience, merlot applications can be divided into two main categories:

- Aircraft Applications
- Crew Applications

There are a number of applications under these two main categories. Crew applications include:

- CrewPlan
- CrewBuild
- CrewRoster
- CrewPortal
- CrewMonitor
- CrewFollow
- CrewPayroll

1) FrameWork Applications

The merlot.aero suite of applications eliminates the use of text commands by employing a Graphical User Interface (GUI). You are presented with the following options in all applications across the merlot.aero suite.



These are FrameWork applications that will follow you throughout the Merlot Suite.



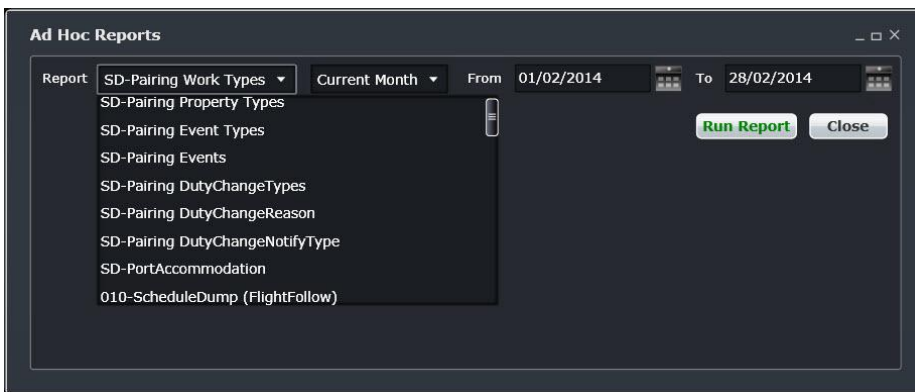
This icon is the Job Engine. If **red** this means the job engine has stopped. If **green** the job engine is running.



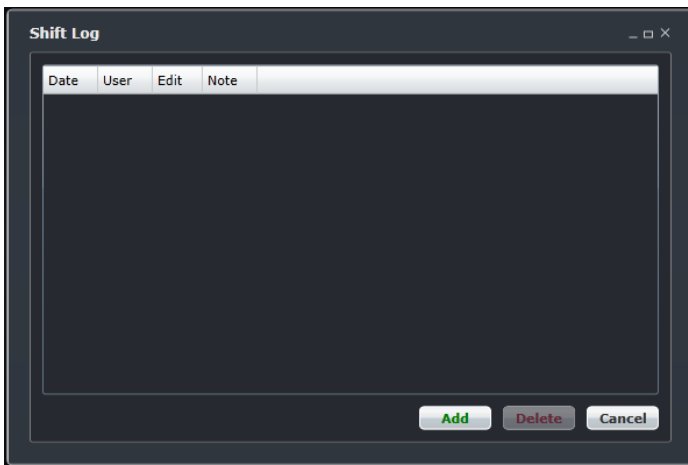
This icon is the signal strength of your connection to the Internet.



This icon is Ad Hoc Reports. Clicking this icon will give you a number of reports available within whatever module of the merlot.aero suite you are in. Ad-hoc reports are available in all the applications and modules across the merlot.aero suite while specific application reports are available in the Reports drop-down menu.



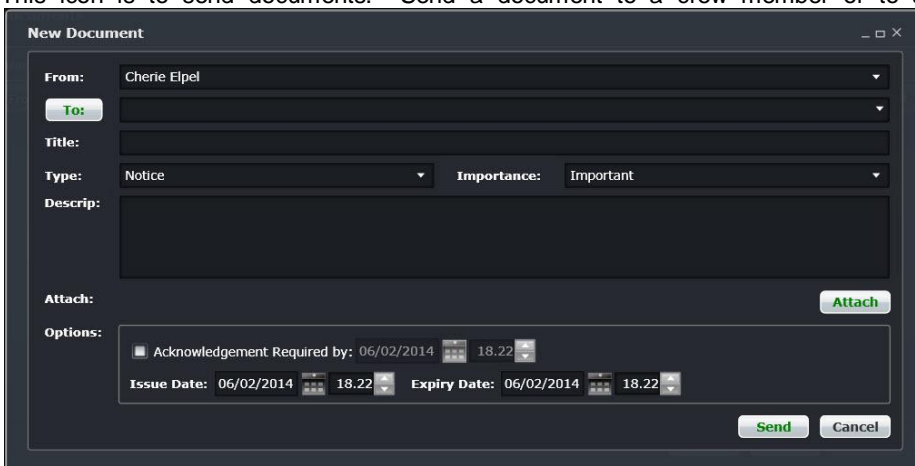
This icon is the Shift Log. You can add notes to the Shift Log for any system user to see.



This icon is to Add Task. Set a daily or one time reminder for everyday activities (i.e.: Accommodation Check).

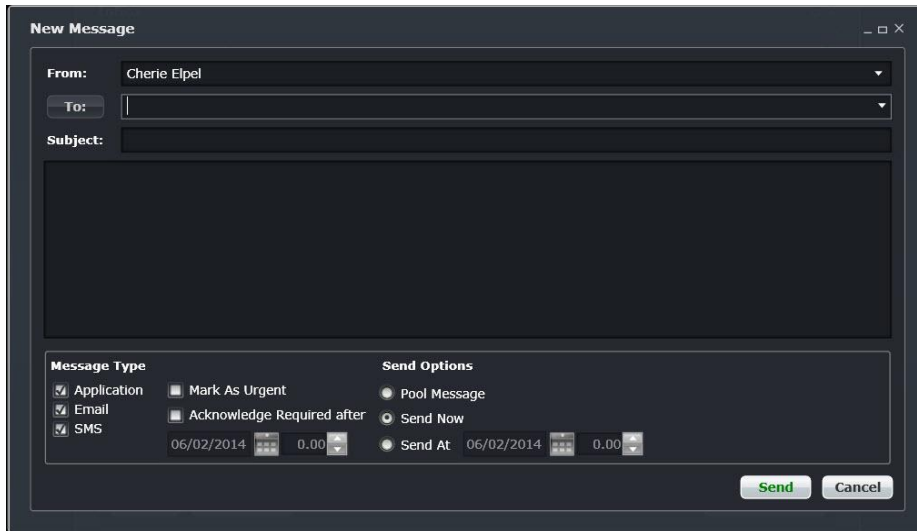


This icon is to send documents. Send a document to a crew member or to a fellow merlot.aero user.





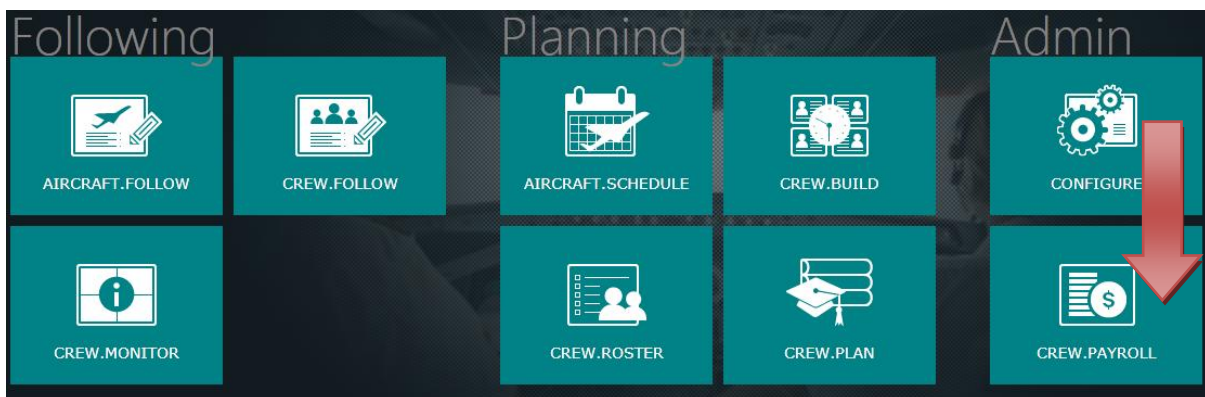
This is the mail icon. Send messages to crew members or co-workers via SMS, email or directly within the merlot.aero suite.



This icon allows you to navigate throughout the entire merlot.aero suite.

2) Logging into CrewPayroll

With your merlot.aero credentials simply log in and select CrewPayroll.



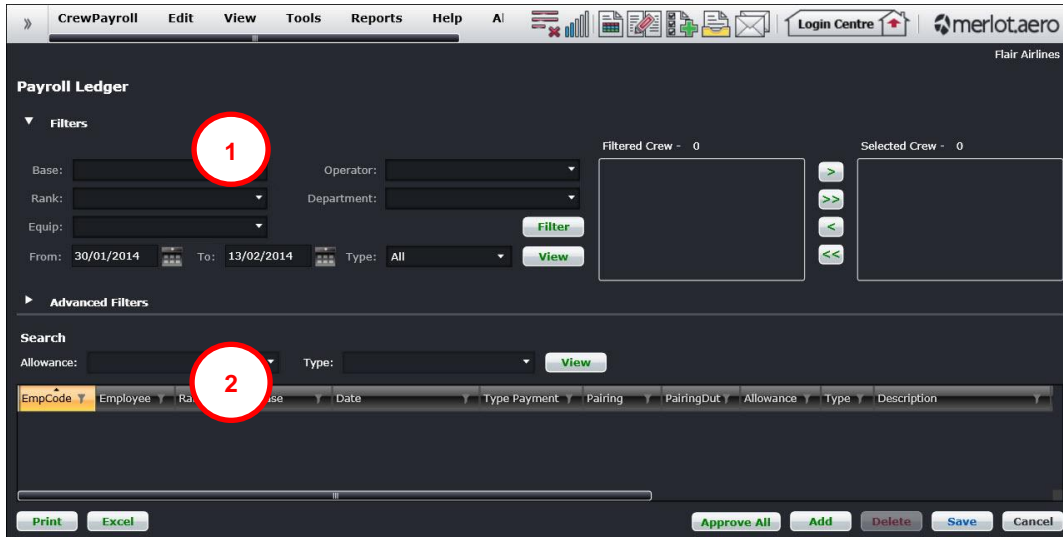
3) What is CrewPayroll?

The CrewPayroll application allows the user full control to manage pay periods, allowance types and allowance generation. The application has user security access options restricting access to finance and admin users. The user is able to set, view, edit, delete the allowance periods for each department.

CrewPayroll manages all the financial records and data related to salaries, wages, overtime, bonuses, allowances and deductions for the Crew members/employees during a specific time period.

4) The Graphical User Interface (GUI)

The merlot.aero suite of applications eliminates the use of text commands by employing a Graphical User Interface (GUI). Let's explore the CrewPayroll GUI:

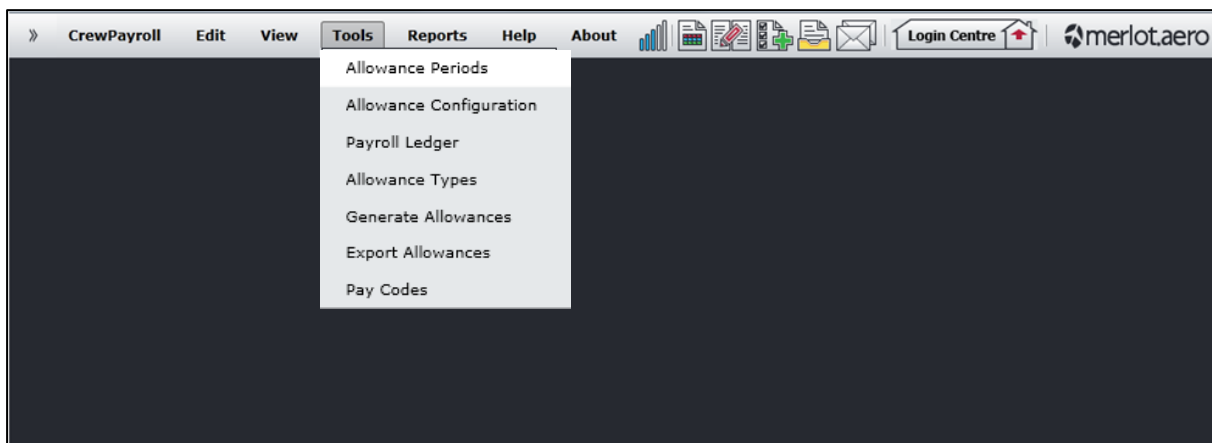


1. **Filter Panel:** Set your criteria for the crew members you wish to view
2. **Allowance Gantt:** Approve, edit, add and delete pending allowances

5) Using CrewPayroll

The main functionality of CrewPayroll can be found under the Tools menu in the GUI.

- Allowance Periods
- Allowance Configuration
- Payroll Ledger
- Allowance Types
- Generate Allowances
- Export Allowances
- Pay Codes



6) Allowance Periods

An allowance is money, given at regular intervals for a specific purpose, for example a travel allowance that covers hotel bills of a crew member. This amount of money is given or allotted usually at regular intervals for a specific purpose; these intervals are called Allowance Periods.

To access the Allowance Periods menu, click Tools in the menu bar and select Allowance Periods.

Flair Airlines

Allowance Periods

Operator: Flair Airlines **a**

Department: Flight Crew **b**

Drag a column header and drop it here to group by that column

Period Name	Start Date	End Date	Active
July 2014	7/1/2014	7/31/2014	<input checked="" type="checkbox"/>
August 2014	8/1/2014	8/31/2014	<input checked="" type="checkbox"/>
September 2014	9/1/2014	9/30/2014	<input type="checkbox"/> c

e
 d
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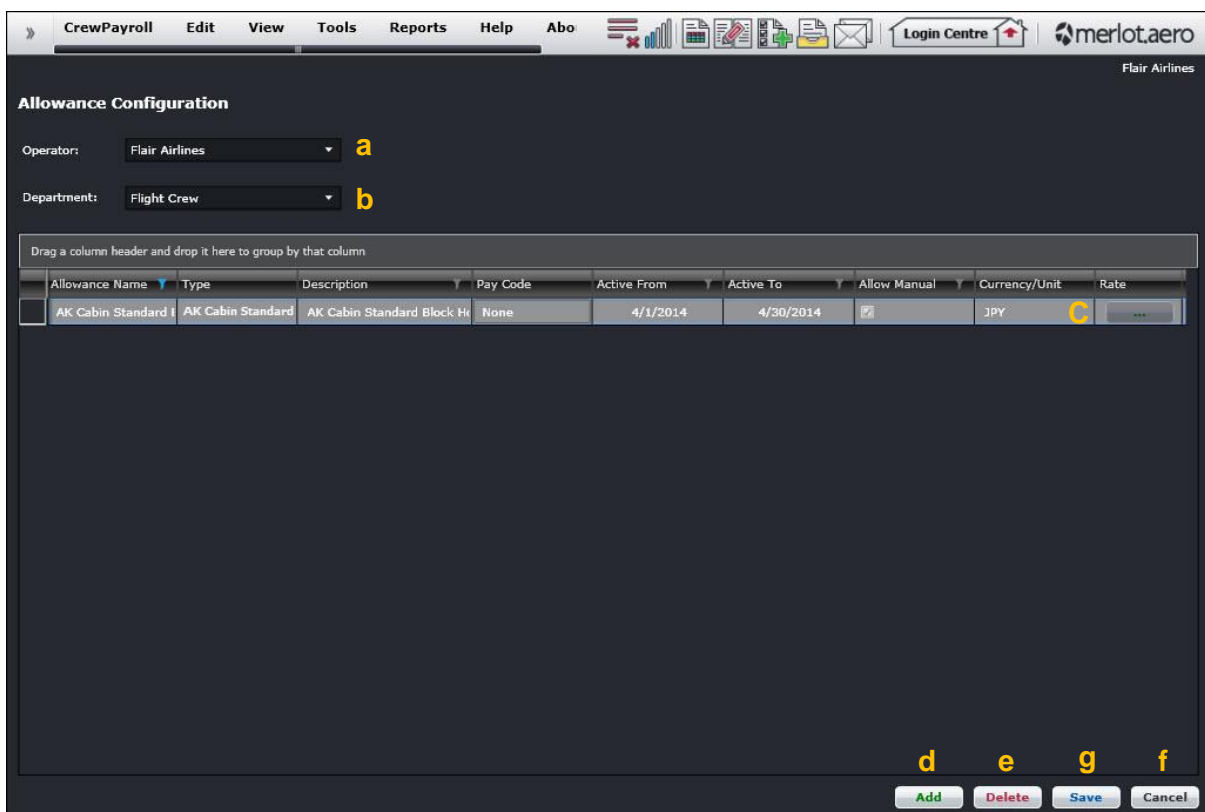
h
 g

- Select an **Operator** from the drop-down list. The drop-down menu filters the grid to show Allowance Periods for a select airline operator.
- Select a **Department** from the drop-down list. These departments are the areas within an airline that are tasked with providing services of a similar type. For example Flight Operations (i.e. the manning and operating of aircraft), Maintenance (ensure the aircraft are able to operate safely), and Ramp (the parking and coordination of aircraft resupply between flights).
- This grid is filled with contents based on your selection of operator and department. Here you can view all the existing Allowance Period records available in the system for that Operator and Department. To Edit an existing Allowance Period record, double-click on the selected row, that row will become an editable row, make changes as required, and then click on the **Save** button.
- To add (define) a new Allowance Period record, click on the **Add** button, it will insert a new blank row after the last record, where you can add data as required, then click the **Save** button when done.
- To replicate an Allowance Period record, click on the **Replicate** button. If an allowance period is selected and the Replicate button clicked, the same period name, start and end date will be copied, for each active department set up in the system.

- f. To delete a record, select the row, click on the **Delete** button present at the right corner of the screen. Be careful about deleting records. If you have deleted a wrong record accidentally, click on the **Cancel** button to undo your mistake; otherwise, if you are sure to delete that particular record, click on the Save button to make the changes permanent.
- g. To undo all the changes that you made in your session, click on the **Cancel** button. You can press the Cancel button to undo recently made changes. The Cancel button will undo any modifications to the data since the last save (or when the screen was opened), by refreshing the screen and reloading the previously saved data.
- h. To save changes permanently, click on the **Save** button. If you have closed the above screen without clicking on the Save button, your recently modified data or newly added records would NOT be saved for later access. Once you have clicked on the Save button, you cannot undo the recently made changes.

7) Allowance Configuration

Allowance Configuration allows the user to configure allowance types and rates per department and employee rank based on a date range. To access Allowance Configuration, click on Tools in the menu bar and select Allowance Configuration.



Operator: Flair Airlines **a**

Department: Flight Crew **b**

Allowance Name	Type	Description	Pay Code	Active From	Active To	Allow Manual	Currency/Unit	Rate
AK Cabin Standard	AK Cabin Standard	AK Cabin Standard Block H	None	4/1/2014	4/30/2014	<input checked="" type="checkbox"/>	JPY	C

d **e** **g** **f**

Add Delete Save Cancel

- a. Select an **Operator** from drop-down list. This drop-down menu filters the grid to show Allowances for a selected airline operator.
- b. Select a **Department** from the drop-down list. These departments are areas within an airline that are tasked with providing particular services of a similar type. For example there are Flight Operations (i.e. the manning and operating of aircraft), Maintenance (ensure the aircraft were able to operate safely), and Ramp (the parking and coordination of aircraft resupply between flights).

- c. This grid will be filled with the contents based on your selection of operator and department. Here you can **View** all the existing Allowance Configuration records available in the system for the Operator and Department you have filtered for. Basic allowance information is managed here, while all logic to define how allowances are earned and generated, are managed directly within Merlot's Rules Engine.

- Allowance Name
- Type: Drop down of configured allowance types in the system
- Description: Free text field
- Pay code: Select pay code, if applicable
- Active From/To fields: Validation ensures that Active To must be greater or equal to Active From
- Allow: Determines whether this allowance type can be manually added
- Currency: This is a dropdown of the Currencies configured in the Merlot data table
- Rate: Selecting this option displays the **Allowance Rates** form (as shown below)

Rank	Active From	Active To	Rate
FA	01-Jan-10	01-Jan-15	12.50000
SFA	01-Jan-10	01-Jan-14	12.50000

To Edit an existing Allowance Configuration record, double-click on the selected row, the row will become an editable row, make changes as required, and then click on the **Save** button.

- d. To add (define) a new Allowance Configuration record, click on the **Add** button, it will insert a new blank row after the last record, where you can add data as required, and then click on the Save button when done.
- e. To delete a record, select the row, and then click on the **Delete** button present at the right corner of the screen. Be careful about deleting records. If you have deleted a wrong record accidentally, click on the **Cancel** button to undo your mistake; otherwise, if you are sure you want to delete the record, click on the **Save** button to make the changes permanent.
- f. To undo all the changes that you made in your recent session, click on the **Cancel** button. You can press the Cancel button at any time to undo the recently made changes. The Cancel button will undo any modifications to the data since the last save.
- g. To save the changes permanently, you just made, click on the **Save** button. If you have closed the above screen without clicking on the Save button, your recently modified data or newly added records will NOT be saved for later access. Once you have clicked on the **Save** button, you cannot undo the recently made changes.

8) Payroll Ledger

Payroll Ledger allows the employer or payroll employee to view the amount of money that was paid out and to which crew/engineer/employee and it typically serves as backup documentation for tax purposes. The Payroll Ledger lists the employees' salaries and lists the transactions in the form of debits and credits.

To access the Payroll Ledger, click Tools in the menu bar and select Payroll Ledger.

- a. The Filter section defines the set of employees that will be displayed within the grid. It has following options:
 - Select the From and To date ranges from drop-down calendars
 - Select the Base, Operator, Rank, Department and Equip from the respective drop-down menus.
 Finally, click on the **Filter** button. The list of Filtered Crew will be displayed in a box as shown above.

- b. The set of potential employees is displayed in the box, you can choose from that set which employees should be displayed. Generally, you will only want to display a subset of the employees that match the results of the filter criteria. You have control of which employees you display, to do this two crew lists are included. The Filtered Crew list contains the employees that match the filter criteria, whereas the Selected Crew list contains the employees that the user has selected to display. Arrows (<, <<, >, >>) are provided to select or deselect employees.

Once you have moved the desired crews from your left hand box to the right hand box, click on the **View** button to display the list of filtered crew in the grid.

- c. This grid will be filled with the contents based on your selection of selected crew, here you can view all the existing Allowance records available in the system. These records contain all the basic information like allowance name, type, status, currency, amount etc.

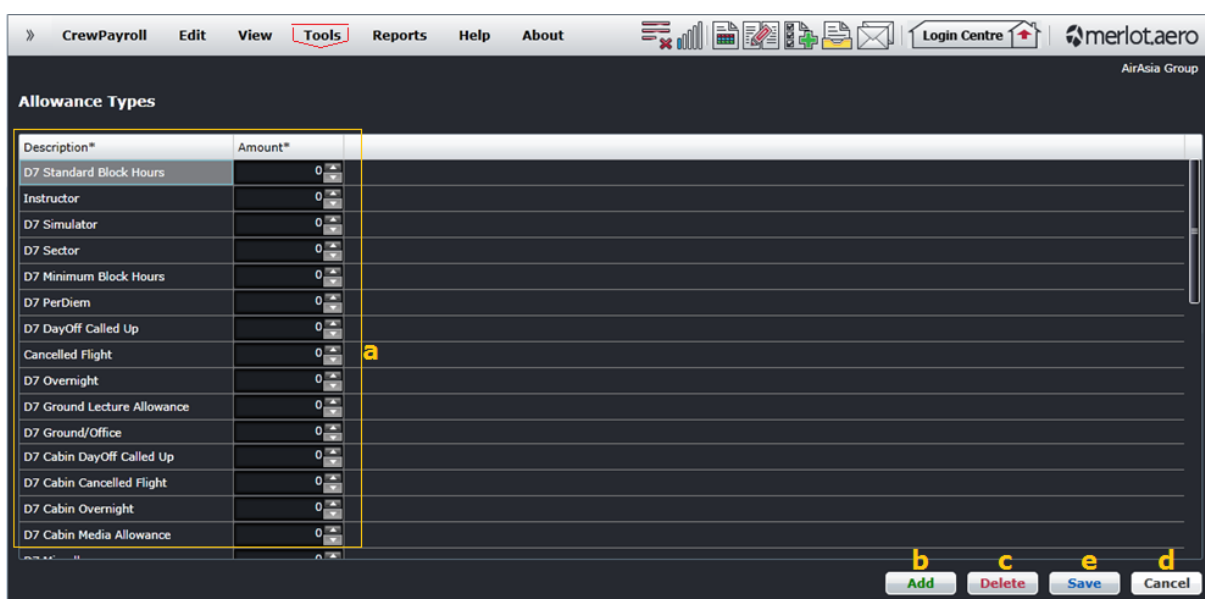
To **Edit** an existing Allowance record, double-click on the selected row, that row will become an editable row, make changes as required, and then click on the **Save** button.

- d. To print out this ledger for further analysis, click on the **Print** button.
- e. To generate a report, export this ledger to Microsoft Excel. Click on the **Excel** button to export to Excel. Once this ledger has been shifted to Excel, you can make changes or format the layout of this as required for reporting purposes.
- f. The Approve All button will change the status from Pending to Approved (not shown above). Click the **Approve All** button once you have spot checked and verified that allowances have been correctly calculated.
- g. To add (define) a new Allowance record, click on the **Add** button, it will insert a new blank row after the last record, insert all the information in that row such as Employee name, Allowance, Type, Description. Indicate pending under Status, select Currency and type the amount to pay crew for the particular allowance item that you have added, and then click on the **Save** button when done.
- h. To delete a record, first select the row, and then click on the **Delete** button present at the right corner of the screen. Be careful about deleting any record. If you have deleted a wrong record accidentally, click on the **Cancel** button to undo your mistake; otherwise, if you are sure you want to delete that particular record, click on the **Save** button to make the changes permanent.
- i. To undo all the changes that you made in the recent session, click on the **Cancel** button. You can press the Cancel button at any time to undo the recently made changes. The Cancel button will undo any modifications to the data since the last save (or when the screen was opened).
- j. To save the changes, you just made, click on the **Save** button. If you have closed the above screen without clicking on the Save button, your recently modified data or newly added records will NOT be saved for later access. Once you have clicked on the Save button, you can't undo the recently made changes.

9) Allowance Types

An allowance is money, given at regular intervals for a specific purpose, for example a travel allowance that covers hotel bills for a crew member. There could be several types of allowances for crew members/employees, for example overnight allowance, day off, called up allowance etc. Users can add or edit types of allowances in the screen shown below. Typically these types of allowances are pre-generated by the system and do not required user input.

To access the Allowance Types, please click Tools in the menu bar and select Allowance Types.



Description*	Amount*
D7 Standard Block Hours	0
Instructor	0
D7 Simulator	0
D7 Sector	0
D7 Minimum Block Hours	0
D7 PerDiem	0
D7 DayOff Called Up	0
Cancelled Flight	0
D7 Overnight	0
D7 Ground Lecture Allowance	0
D7 Ground/Office	0
D7 Cabin DayOff Called Up	0
D7 Cabin Cancelled Flight	0
D7 Cabin Overnight	0
D7 Cabin Media Allowance	0

- This grid will be filled with the allowance types, here you can View all the existing Allowance types available in the system. To Edit an existing Allowance type, double-click on the selected row, that row will become an editable row, make changes as required, and then click on the **Save** button.
- To add (define) a new Allowance Type, click on the **Add** button, it will insert a new blank row after the last record, where you can type the description, and add an allowance amount by clicking on the arrows. When finished, click on the **Save** button.
- To delete a record select the row, and click on the **Delete** button present at the right corner of the screen. Be careful about deleting records. If you have deleted a record accidentally, click on the **Cancel** button to undo your mistake; otherwise, if you want to delete the record, click on the **Save** button to make the changes permanent.
- To undo all the changes that you have made in your recent session, click on the **Cancel** button. You can press the Cancel button at any time to undo the recently made changes. The Cancel button will undo any modifications to the data since the last save (or when the screen was opened).
- To save changes permanently, click on the **Save** button. If you have closed the above screen without clicking on the Save button, your recently modified data or newly added records will NOT be saved for later access. Once you have clicked on the Save button, you can't undo the recently made changes.

10) Generating Allowances

Generate Allowances renders a form which allows the user to publish pay and allowance data for crew members for a specific date range. To access the Generate Allowance feature, click Tools from the menu bar and select Generate Allowance.

- The Filter section defines the set of employees that could be displayed within the published allowances. It has following options:

Select the From and To date ranges from drop-down calendars

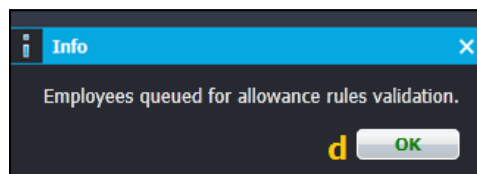
Select the Base, Operator, Rank, Department and Equip from the respective drop-down menus.

Finally, click on the **Filter** button. The list of Filtered Crew will be displayed in a box as shown above.

- b. The set of potential employees is displayed in the Filtered Crew box, you can choose from that set which employees should be displayed in the final published allowance list. Generally, you will only want to display a subset of the employees that match the results of the filter criteria. You have control of which of those employees you want to display on two different crew lists, the Filtered Crew list and the Selected Crew list. The Filtered Crew list lists the employees that match the filter criteria, whereas the Selected Crew list contains the employees that the user has selected to display. Arrows (<, <<, >, >>) are provided to select or deselect employees.

If the Run Reconciliatory Allowances checkbox is selected, allowances will be corrected for a roster period. However, keep in mind that reconciliatory allowances will only be corrected if the allowances are tagged as reconciliatory in the database.

- c. Once you have moved the desired crews from the left hand box to the right hand box, click on the **Publish** button to generate the crew allowances based on your filter selection. To undo all the selections that you made in your recent session, click on the **Cancel** button.
- d. Once you click the **Publish** button, you will get a pop-up notification as shown below; click on the **OK** button to acknowledge this information.



Once you have generated the allowances you should wait a few hours until the job process is showing success, then you can view your allowances.

Note: *If you need to re-generate a specific crew member due to duty changes made after your first publish, you do not need to send all the crew again, you can generate the allowance based on your selected crew.*

11) Exporting Allowances

Export Allowances renders a form which allows the user to export pay data to a flat file, for processing in the airline's payroll system. To access the Export Allowances feature, click Tools in the menu bar and select Export Allowances.

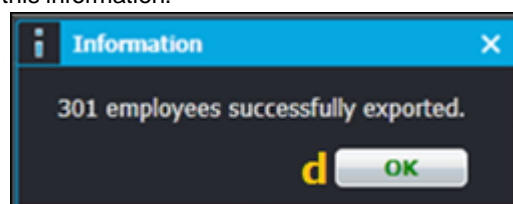
- a. The Filter section defines the set of employees that could be displayed within the exported copy. It has following options:
 Select the From and To date ranges from drop-down calendars
 Select the Base, Operator, Rank, Department and Equip from the respective drop-down menus.

Finally, click on the **Filter** button. The list of Filtered Crew will be displayed in a box as shown above.

- b. The set of potential employees is displayed in the Filtered Crew box, you can choose from that set which employees should be displayed in the final exported file. Generally, you will only want to display a subset of the employees that match the results of the filter criteria. You have the control which of those employees you want to display, to do this two crew lists are included. The Filtered Crew list contains the employees that match the filter criteria, whereas the Selected Crew list contains the employees that the user has selected to display. Arrows (<,<<, >,>>) are provided to select or deselect employees.
- c. Once you have moved the desired crews from your left hand box to the right hand box, click on the **Export** button to generate the exported file.

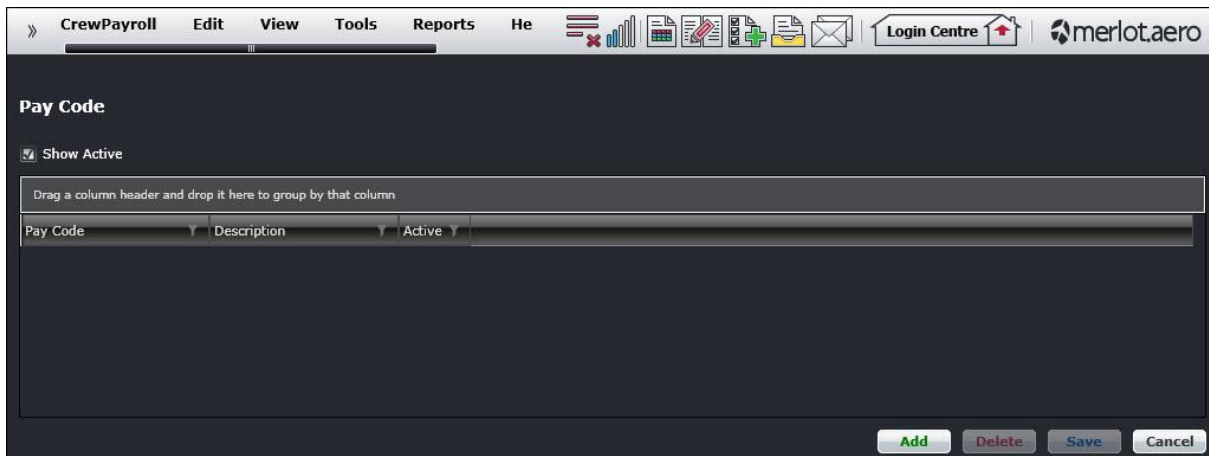
To undo all the selections that you made in your recent session, click on the **Cancel** button.

- d. Once you have clicked the Export button, you will get a pop-up notification as shown below; click on the **OK** button to acknowledge this information.



12) Pay Codes

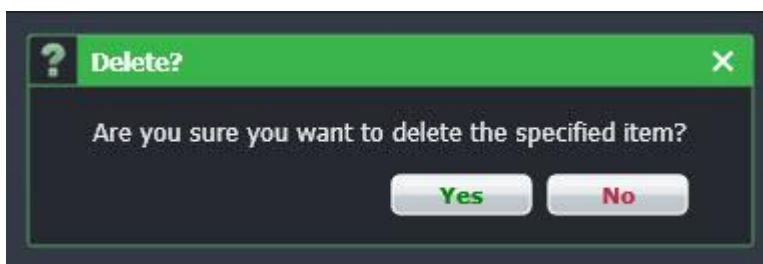
To access the pay codes feature, click Tools from the menu bar and select Pay Codes. This feature enables users to view pay codes as well as to add and delete pay codes.



When the Show Active check box is selected, active pay codes will be displayed in the drop-down menu under the Pay Code column with the corresponding pay code description in the Description column.

To add a pay code, click on the **Add** button and enter the Pay Code and the Pay Code Description under the applicable column. If the pay code is an active pay code, select the Active check box in the Active column. Save your entry by clicking on the **Save** button. When you expand the Pay Code column, the new pay code will be visible.

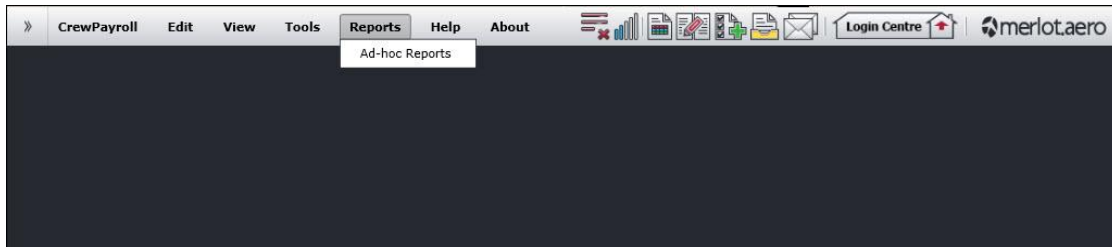
To delete a pay code, select the pay code from the Pay Code drop-down menu and click the **Delete** button.



Once you have verified the pay code for deletion, click the **Yes** button to delete.

13) Reports

To view Reports within CrewPayroll, select the Reports tab and choose a report from the drop-down menu.



The Reports menu houses CrewPayroll application specific reports including:

- Ad-hoc Reports

These reports can be customized to meet specific customer requirements.