# How to Use GrandMaster Suite

# Earning Rate Tables

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## How to Use GrandMaster Suite - Earning Rate Tables

## Overview

Earning Rate Tables are an optional tool that may be used to define employee salaries and rates. When a Rate Table is used to its full capacity you never need to be concerned about an employee's rate change being missed.  The earning rate table may be assigned to employees directly or through the use of positions or templates.



Earning Rate Table (with three rates for Plant workers)

Junior employees earn Rate 1    Senior employees earn Rate 2    Job Foreman earns Rate 3
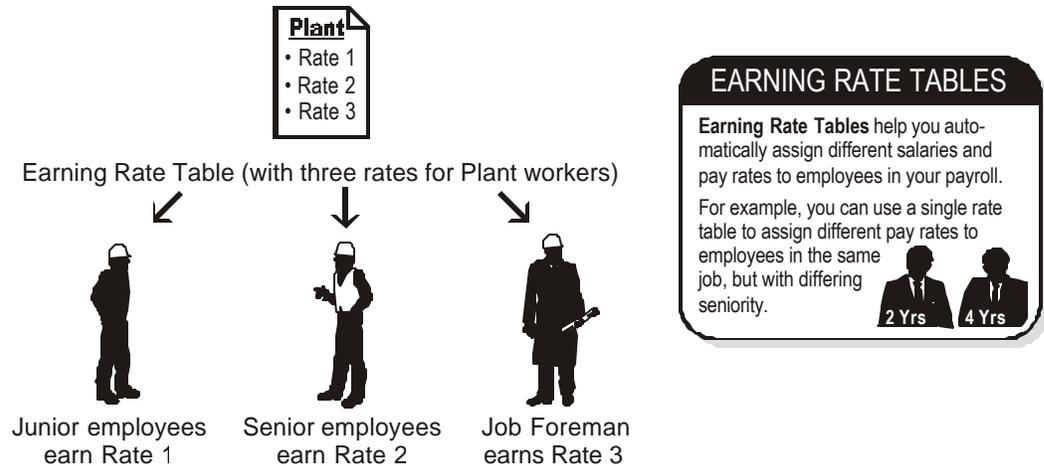
When you create an earning rate table, you can even assign it to a specific position and have the program determine the correct employee rate when the employee performs various positional tasks within a pay period.

## When should I use Earning Rate Tables?

- When you need to define a set salary or rate scale for employees that perform similar duties in union shop environments. The earning rate table would represent a particular earning scale that can conform to any union agreement.

- When you need to pre-determine an employee pay rate based on their position.  The program will automatically calculate the appropriate pay rate based on the type of job they perform.

## How does it work in GrandMaster Suite?

Earning Rate Tables are defined at the payroll level.  Once defined, you can apply them to your employees as you add the employee to the payroll.  You can even use the *Employee Template* feature to assign an Earning Rate Table to new employees automatically.

Each table allows you to specify its effective date using the Start and End date method.  Each table can contain up to 200 rows, with each row containing 10 further sub-steps.  You may define rates to be hourly, by pay period, annual, by piece or determined by the earning setting.

> **Optional Feature:** Earning Rate Tables are optional when defining an earning. Although they offer you great flexibility, you can still use the standard method of entering hours and setting pay rates manually.

## Earning Rate Tables and Positions

When you create a Position, a specific earning rate table may be assigned to the Position, including the table row and step. By utilizing an Earning Rate Table with a position you ensure that the employee will continue to be paid the correct pay rate regardless of the positional task performed within the pay period. When the rate table is tied to a Position the appropriate Distribution for the earning will also be assigned based on the positional task performed.



**Fig. 1**
*The PRODUCTION Earning Rate Table Associated with a Position*

Refer to *Assigning an Earning Rate Table to a Position* section of this document for more information.

## Earning Rate Tables and Templates

Employee Templates provide you with greater efficiency when performing common data entry tasks. The template may be used to apply an earning rate table to a group of like employees. If you need to update the template, the employees associated with the template will be updated automatically.
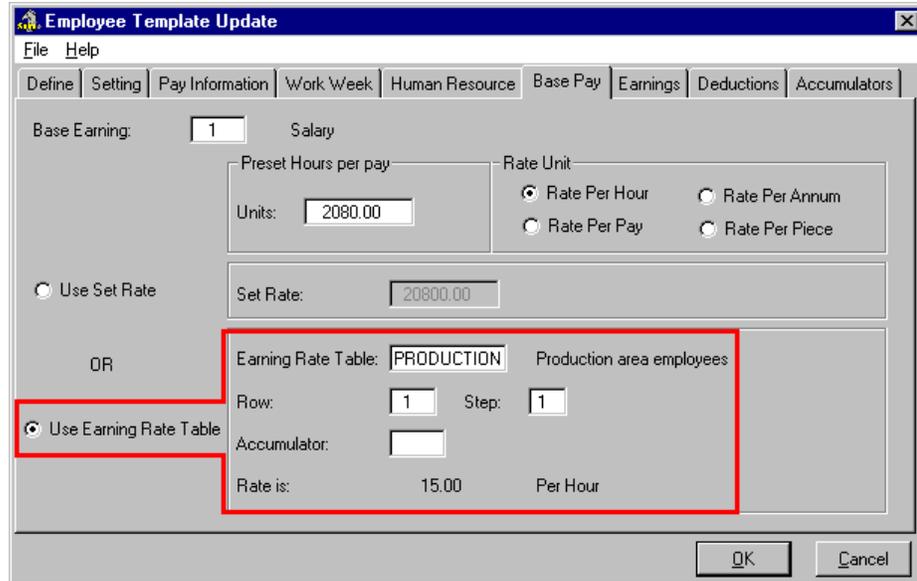
**Fig. 2**
*The PRODUCTION Earning Rate Table Associated with a Template*

Refer to *Assigning an Earning Rate Table using Templates* section of this document for more information.

## Earning Rate Tables and Groups

The Payroll Condition Group is a useful tool in dynamically selecting certain employee when performing various payroll tasks. Groups are available for use in all program modules. When you apply a conditional group that has an associated earning rate table the program will search the employee database and generate a group of employees who have been assigned the selected earning rate table.

In the example below, the Payroll Condition Group will search for and create the group based on all employees who are associated with the PRODUCTION Earning Rate Table. Once the group has been applied, the program will focus on only those employees who were found within the database with the PRODUCTION earning rate table.
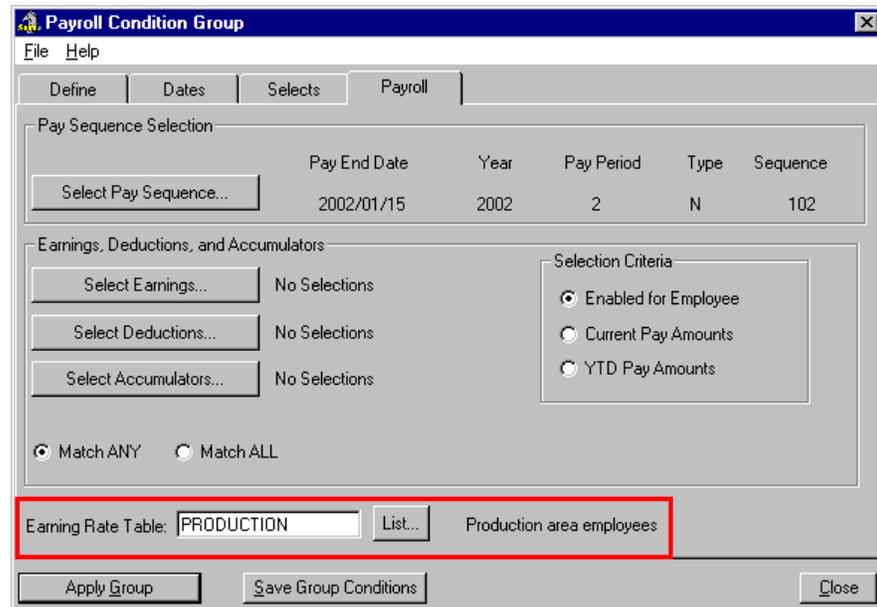
**Fig. 3**
*An Earning Rate Table Associated with a Payroll Condition Group*

Refer to *Assigning Earning Rate Tables* section of this document for more information.

# Working at the Payroll Level

When you begin working with Earning Rate Tables, you must start at the payroll level.  This is where you define the information for each table as its effective date, substitution rules, pay values, etc.  Later on once your table is created, you can move to the employee level to assign it to each employee.

## Creating Earning Rate Tables

Once you have determined that an earning rate table is necessary the Earning Rate Table can be created via commands under the *Payroll Module's* **Payroll** menu.

**TO CREATE AN EARNING RATE TABLE:**

1.   With a payroll selected, choose the ***Rate Tables - Earning*** command from the **Payroll** menu.
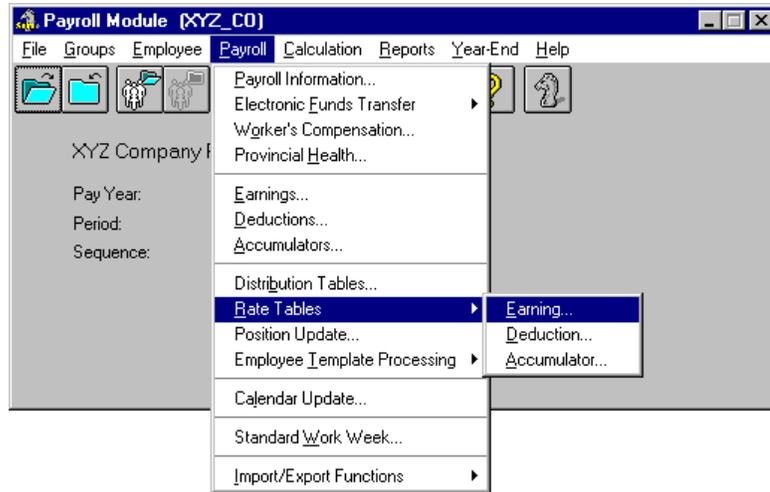
**Fig. 4**
*The Rate Tables - Earning Command*

This opens the *Global Earning Tables* dialog box that displays a list of tables that have been defined for the current payroll.
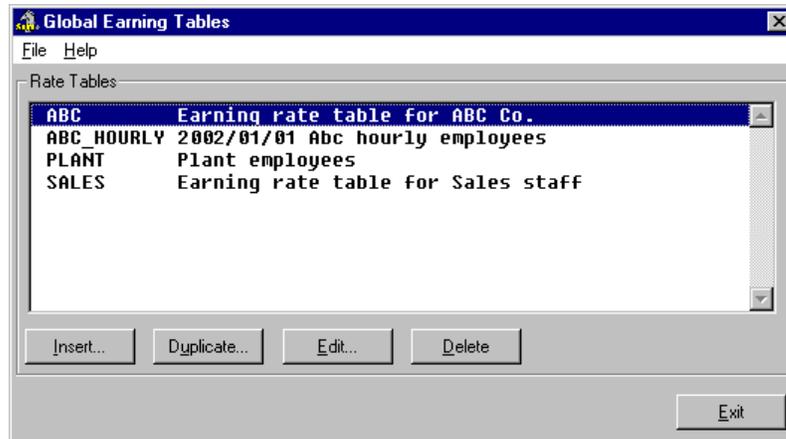


**Fig. 5**
*The Global Earning Tables Dialog Box With 4 Earning Tables*

**2.** Choose the *Insert* button and enter a unique name for the new table in the *Table Code* field. Define a name that will help you identify this table in the future.  For example, if your table is primarily for Production-based employees, you could name it "Production".



**Fig. 6**
*The Insert New Table Dialog Box with Name Added*

**3.** Click *OK* to assign the name to your new table.  This opens the *Global Earning Table Entry* dialog box where you can define the details for the new table.

**Fig. 7**
*The Global Earning Table Entry Dialog Box*

**4.** Use the *Description* field to enter a brief description that will help you identify this table in the future.  For example, if your table name is PRODUCTION, the description could read "Production area employees".

**5.** If your table is dependent on certain dates, enter these dates in the *From* and *To* fields.  For example, you could use this feature if your company has a union contract that specifies certain rates to be applicable for a pre-determined length of time.

Refer to the *Defining Earning Rate Tables to use Effective Dates* section of this lesson for further information.

**Note:** If your table is to be used at all times, you do not need to enter any Start or End dates.

**6.** In the *Search Handling* section, choose a radio button that corresponds to the method the program will use when searching the earning table for the applicable rate.  For example, you can instruct the program to verify that the employee works a set number of days or hours before they receive a pay rate increase.

The following figure shows a completed *Step Entry* dialog box and the table that follows outline each of the *Search Handling* methods and briefly describes how each one works.
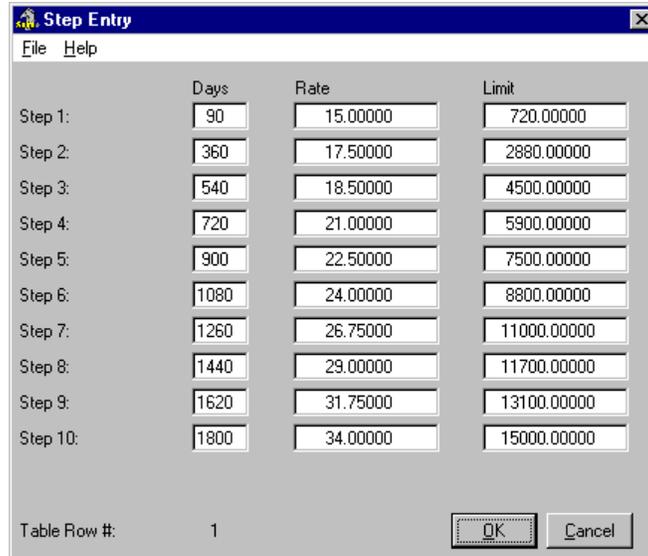
**Fig. 8**
*A Sample Step Entry Dialog Box for a Rate Table Row*

| Limit AND Days | When this option is selected the program will determine the correct rate based on both the Limit and Days. This option MUST assume the row that satisfies both conditions. |
|---|---|
| | **Limit** - Compares to a value, amount of units, hours, etc., in an accumulator to determine the row. You must define a specific accumulator that will accumulate the values to be used when searching the rate table to find the correct rate. |
| | For example, using the rate table shown above, we have defined the *Limit* column to be based on hours worked with the first step requiring an employee to have worked a minimum of 720 hours and 90 days before the program would step to the next rate level. When defining the accumulator to be used to track the *Limit* value or units, you would choose the *% of Hours* accumulator calculation method. You would define the % rate as 100% and choose the *Hourly* and *Overtime* earnings on which to evaluate. This accumulator will add 1 hour, or unit, to the accumulator balance for every hour worked as Hourly or Overtime. |
| | **Note:** For more detailed information on Accumulators, their use and how to set up an accumulator, please refer to the Accumulators online help topics. |
| | **Days** - Refers to the number of calendar days since the employee's Start Date. |
| | Since both conditions must be satisfied when using the Limit AND Days option, the table will take the lower position in the table of the two unless both conditions are met on the same row. |
| | Using this table, if an employee has been employed for 600 days and the accumulator tracking hours worked has reached 3500 hours, the table will assign a rate of 17.50 per hour to the earning. |

| Limit Only | This option (the program default) requires you to assign the rate table to an accumulator to determine the correct rate. |
|---|---|
| Limit OR Days | When you select this option, the rate table assumes the row that satisfies the higher of the two conditions. |
| | For example, using the above table, if the company had employed the employee for 600 days but had only worked 3000 hours, the program would assign 18.50 as the rate. In this case the Days employed were the higher of the two conditions. |
| Days Only | When you select this option, the correct rate will be determined by the user-defined number of calendar days since the employee start date. |
| Search Forward | When you select option, the program will search forward in the table from a specified cell (row and step) as the starting point for the search when resolving a pay rate. |
| | The search will also adjust the accumulator value passed to the program so that the limit tests for the search will reflect the starting point limits. The starting position for the rate table will be determined by the step and row defined in the earning update. This allows individual employees to have varying starting points within the rate table. |
| Not Searchable | You must define the Row and Step when this option is selected. |

**Note:** Any search handling option selected that includes Limit as a parameter MUST have an accumulator associated to it to track the limit values.

7. In the *Rate Unit* section, choose a radio button to determine the item that corresponds to the earning unit type. The following table provides a description of each of the available options

| Hour | When this option is selected the values defined in the rate table will be treated as hourly earnings. |
|---|---|
| | This setting will override the rate unit type settings at the employee or payroll levels if the rate table is assigned to the earning. |
| Pay Period | When the user selects this option the values contained in the rate table will be treated as a pay period rate. This option is most commonly used for employees who are salaried. |
| | This setting will override the rate unit type settings at the employee or payroll levels if the rate table is assigned to the earning. |
| Annual | This option will set the earning rate as an annual salary amount. |
| | The advantage to using this option is the user may define an employee's rate as a yearly and the program will determine the correct amount to process each pay period. |
| | This setting will override the rate unit type settings at the employee or payroll levels if the rate table is assigned to the earning. |
| Piece | If the earning is to be based on piecework the user should select this option. |
| | This setting will override the rate unit type settings at the employee or payroll levels if the rate table is assigned to the earning. |
| Earning Set | This option is the program default and when selected the rate unit type will be governed by the earning set up rather than the earning |

| | table. |
|---|---|

**8.** In the *Substitution Rules* section, choose a radio button to determine the item to which the rate table applies.  The following table provides a description of each of the available options

| **Full Table** | The Full Table rule is the program default and places a limitation on the earning to which the earning rate table may be applied.  When using this option, the entire table will be searched in order for the program to resolve a rate. |
|---|---|
| | You may apply a rate table to any of the 200 available earnings that the program supports. |
| **Base Earning Only** | Choose this option to restrict the earning table to be used only with an employee's Base Earning.  If you choose this option, you MUST Base Earning defined for the employee.  The employee Base Earning may be defined during the *Add Employee to Payroll* function, or by editing the employee's *Payroll Specific Information*. |
| **Row is Earning** | This option relates the selected or identified table row to the related earning number (of the available 200 earnings), this allowing each earning to have up to 10 steps. |
| | In the following example, when the earning table row is set to "1" the rate table will apply to the *Salary* earning.  When the earning table row is set to "10" the rates on that row will be used by the *Hourly* earning. |
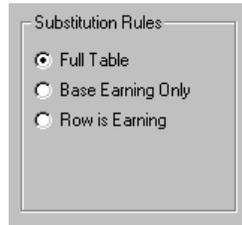


**Fig. 9**
*This Setting Will Use the Full Table to Resolve the Pay Rate*

Once you have applied the applicable Effective Date, Search Handling, Rate Unit, and Substitution Rules, you are ready to define the actual Rate Table.

**9.** Double-click on the first row in the *Rate Table* section.  This opens the *Step Entry* dialog box that is used to define the Rate Table with the appropriate *Days* (if the table search handling uses the days method), the *Rate* for the individual step, and the *Limit* value to be used by an accumulator to determine the step limit.

**Fig. 10**
*The Step Entry Dialog Box (complete with Days, Rate and Limit values)*

Using the above example you can see that this table steps up every 180 days or every 1400 hours worked depending on the *Search Handling* option selected.

**10.** When the *Step Entry* dialog box has been completed, click *OK* to save the changes and return to the *Global Earning Table Entry* dialog box. Rate Table Row 1 will now display the rates for the row that you defined.



**Fig. 11**
*The Updated Row Entry*

If additional rows require definition use the same process outlined above to define each row.

**Note:** The Earning Rate Table may have up to 200 rows, each having up to 10 steps.

**11.** Once the settings for the Earning Rate Table have been defined and you are satisfied with the settings, click *OK* to close *Global Earning Table Entry* dialog box.  This returns you to the *Global Earning Tables* dialog box where your newly defined rate table will appear.
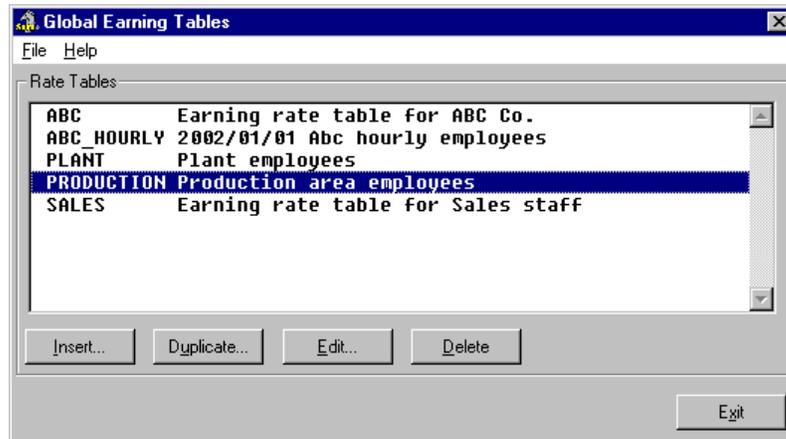


**Fig. 12**
*The New PRODUCTION Rate Table*

## Duplicating Earning Rate Tables

If you need to create an earning rate table that is very similar to an existing one you can create an exact copy instead of creating it from scratch.

**TO DUPLICATE AN EARNING RATE TABLE:**

**1.** With a payroll selected, choose the ***Rate Tables - Earning*** command from the **Payroll** menu.  This opens the *Global Earning Tables* dialog box that displays a list of tables that have been defined for the current payroll.

**2.** Select the Earning Rate Table you wish to copy by clicking on it once with the mouse.  This highlights the row in the list.
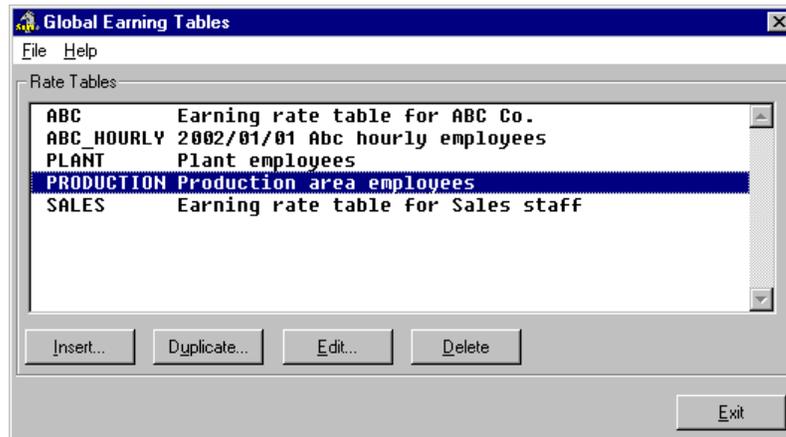


**Fig. 13**
*The PRODUCTION Table is Selected*

**3.** Choose the *Duplicate* button.  This opens the *Global Earning Table Entry* dialog box and populates the various fields with the information from the selected rate table.

**Fig. 14**
*The Duplicated Table with the Information Filled In*

**4.** Change the name of the table by entering a new name in the *Code* field.  For example, if you are duplicating the *Production* table, you could rename the copy *Production2*.  It is important to rename the duplicated table so that you can differentiate between its original counterpart.

**5.** Update the remaining data fields as required and click *OK* to close the dialog box.  This returns you to the *Global Earning Tables* dialog box where your new table appears.
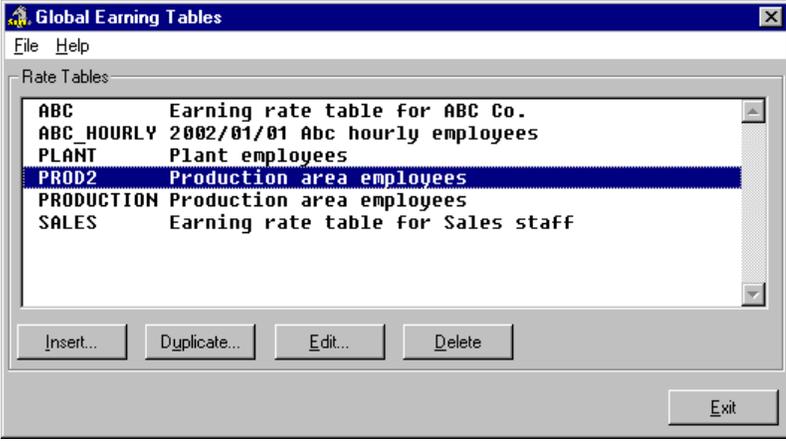


**Fig. 15**
*The Duplicated Table Entitled PROD2*

## Modifying Earning Rate Tables

If you need to change the information for an earning rate table you can do so at any time.  Any changes you make to an Earning Rate Table will automatically be applied to all employees who have the table assigned.

**TO MODIFY AN EARNING RATE TABLE:**

1. With a payroll selected, choose the *Rate Tables - Earning* command from the **Payroll** menu. This opens the *Global Earning Tables* dialog box that displays a list of tables that have been defined for the current payroll.

2. Select the Earning Rate Table you wish to modify by clicking on it once with the mouse. This highlights the row in the list.

3. Choose the *Edit* button. This opens the *Global Earning Table Entry* dialog box so you can view or edit the various data fields.

4. Modify the data fields as required and click *OK* to close the dialog box. As mentioned earlier, any employees who have this table assigned to them will automatically have the new settings applied.

> **Note:** If you modify the *Name* of an Earning Rate Table you will need to reassign it in various program locations based on the new name. For example, if you assigned the **Production** rate table to a Position record then renamed the rate table to **Prod**, the Position record would still be looking for the Production table (which no longer exists).

## Deleting Earning Rate Tables

If you no longer require an earning rate table you can remove it from the program completely. This will prevent other users from using it by mistake.

**TO DELETE AN EARNING RATE TABLE:**

1. With a payroll selected, choose the *Rate Tables - Earning* command from the **Payroll** menu. This opens the *Global Earning Tables* dialog box that displays a list of tables that have been defined for the current payroll.

2. Select the Earning Rate Table you wish to remove by clicking on it once with the mouse. This highlights the row in the list.

3. Choose the *Delete* button. This displays a prompt asking you to confirm the permanent removal of the table.
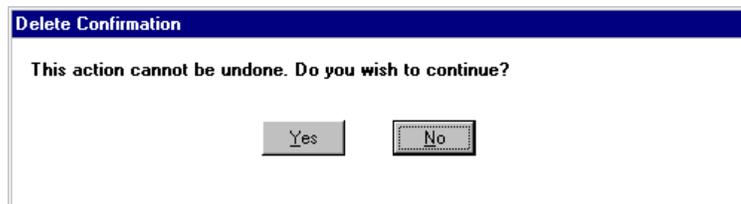


**Fig. 16**
*The Delete Confirmation Prompt*

4. Choose *Yes* to complete the procedure. The *Global Earning Tables* dialog box is updated as the earning rate table is removed.

## Assigning Earning Rate Tables

Once you have created an earning table you can employ it using a variety of methods.

- Assign it through the use of a Position

- Assign it through the use of a Template

- Assign it through the use of a Group

- Assign it directly to an employee

## Assigning an Earning Rate Table to a Position

Earning rate tables may be applied to your employees automatically through the use of the Positions feature.  Many companies use this "Positional Rate Table" method to override their employees' earnings.  This method can help ensure that the employees are paid the correct rate regardless of the positional task they perform within a given pay period.

**Note:** The following section assumes that you have created a position to which you can assign the earning rate table.  If you have not yet created a Position, refer to the *How To Use Positions* document.

**TO ASSIGN AN EARNING RATE TABLE TO A POSITION:**

1.  From the *Payroll Module*, choose the **Payroll *- Position Update*** command.
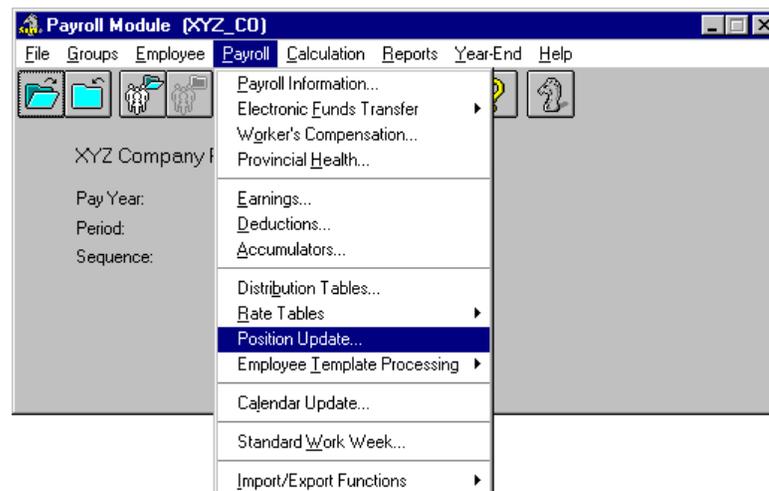


**Fig. 17**
*The Position Update Command*

This opens the *Employee Positions* dialog box that displays a list of Positions in the current payroll.
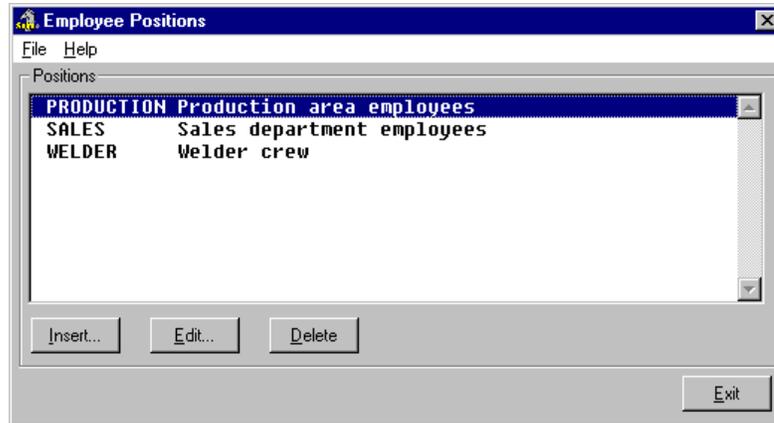
**Fig. 18**
*The Employee Positions Dialog Box with 3 Positions*

**2.** Select the Position to which you would like to assign the earning rate table (in this example, we will choose *PRODUCTION*) then click *Edit*. This opens the *Position Update* dialog box. You will edit the *Earning Rate Table* information to override the default earnings for Production-based employees.
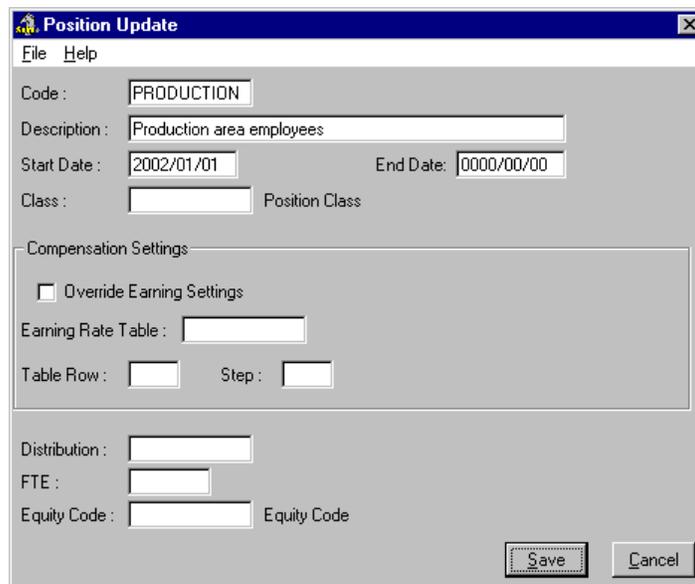


**Fig. 19**
*The Position Update Dialog Box*

**3.** Under the *Compensation Settings* section, place a check in the *Override Earning Settings* checkbox. This will require you to further define the earning table that will be used in place of the default earning.

**4.** To define the earning table, place the cursor in the *Earning Rate Table* field and press **<F8>**. This opens the *Global Earning Tables* dialog box that displays the existing earning tables available for use with this payroll.
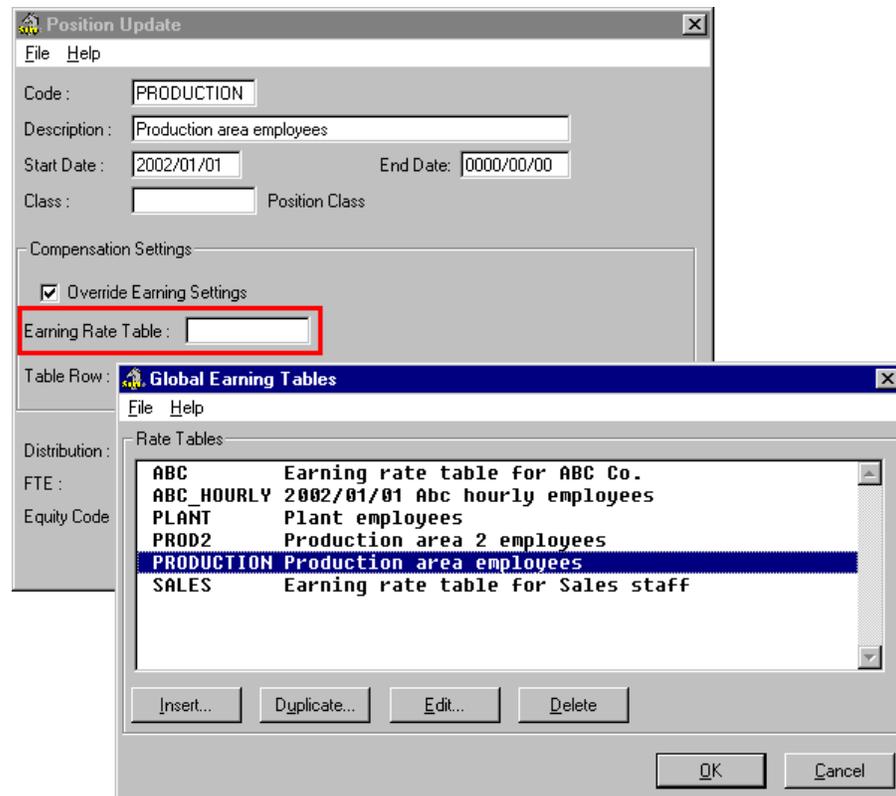
**Fig. 20**
*The Global Earning Tables Dialog Box with 6 Available Earning Tables*

**Note:** If there are no available earning tables in the list, refer to the *Creating Earning Rate Tables* section of this document.

**5.** Select the desired Earning Table from the list (in this example, we will choose *PRODUCTION*) then click *OK* to apply it to the current Position.  This closes the *Global Earning Tables* dialog box and adds the name to the *Earning Rate Table* field.
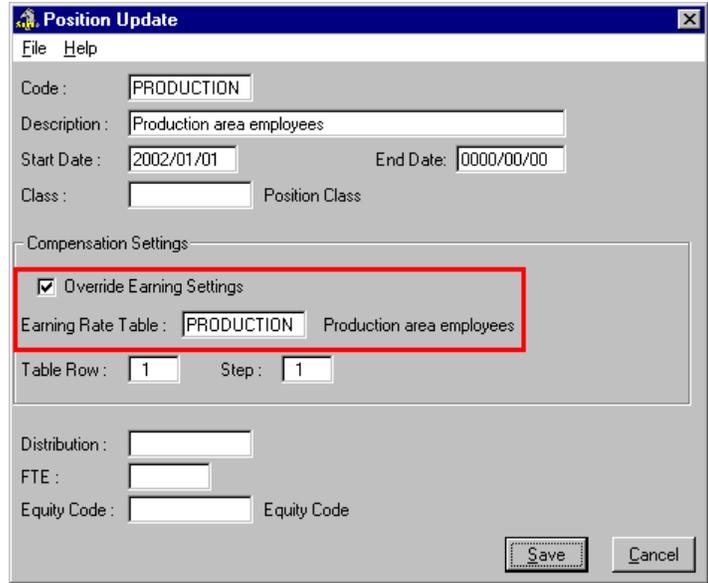
**Fig. 21**
*The Earning Rate Table Applied to the Position*

**6.** Enter the appropriate values in the *Table Row* and/or *Step* number fields that correspond to the assigned Rate Table.  Refer to the *Creating Earning Rate Tables* section of this document for more information on Table Row and Step settings.

**7.** Click *OK* to close the dialog box and save the change.  The Position will now operate based on the settings you specified.

All employees who are associated with the PRODUCTION Position will now have their earnings automatically generated using the values in earning rate table you have just assigned.

## Assigning an Earning Rate Table using Templates

Earning rate tables may be applied to new employees automatically through the use of the Employee Templates feature.  Templates can help you easily apply the table to groups of employees who perform the same tasks.

**Note:** The following section assumes that you have created a template to which you can assign the earning rate table.  If you have not yet created a template, refer to the *How To Use Templates* document.

**TO ASSIGN AN EARNING RATE TABLE USING A TEMPLATE:**

**1.** From the *Payroll Module's* **Payroll** menu choose the *Employee Template Processing - Employee Templates* command.
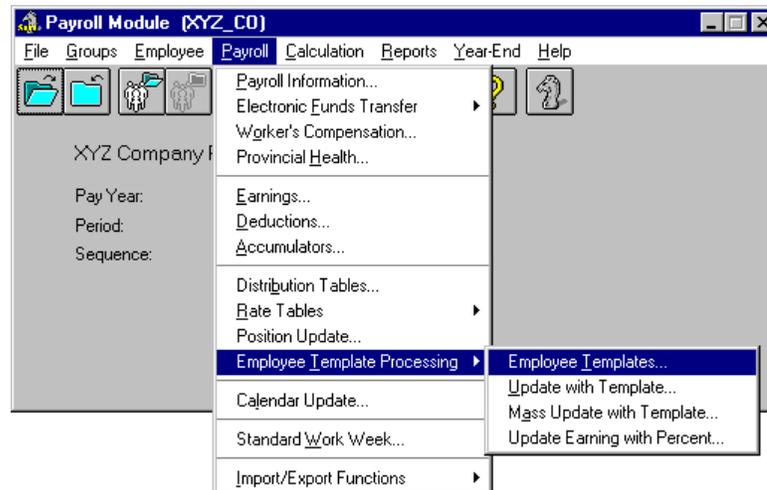
**Fig. 22**
*The Employee Templates Command*

This opens the *Employee Templates* dialog box that displays a list of templates in the current payroll.
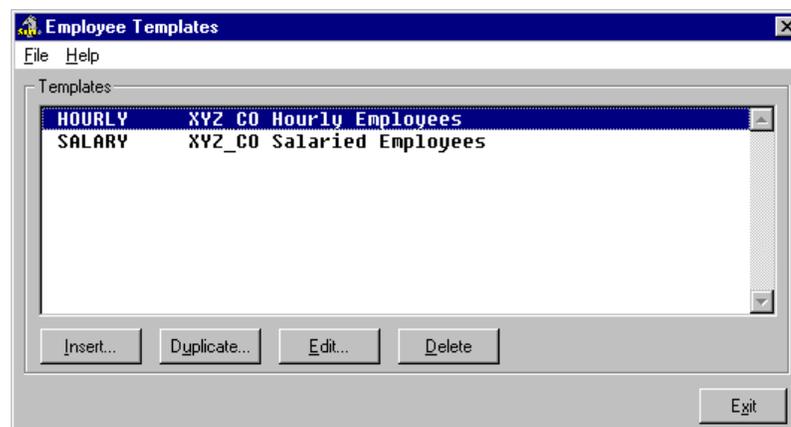


**Fig. 23**
*The Employee templates Dialog Box with 2 Templates*

**2.** Select the template to which you would like to assign the earning rate table (in this example, we will choose *HOURLY*) then click *Edit*. This opens the *Employee Template Update* dialog box. You will edit information under the *Base Pay* tab to override the default earnings for employees who are associated with the Hourly template.
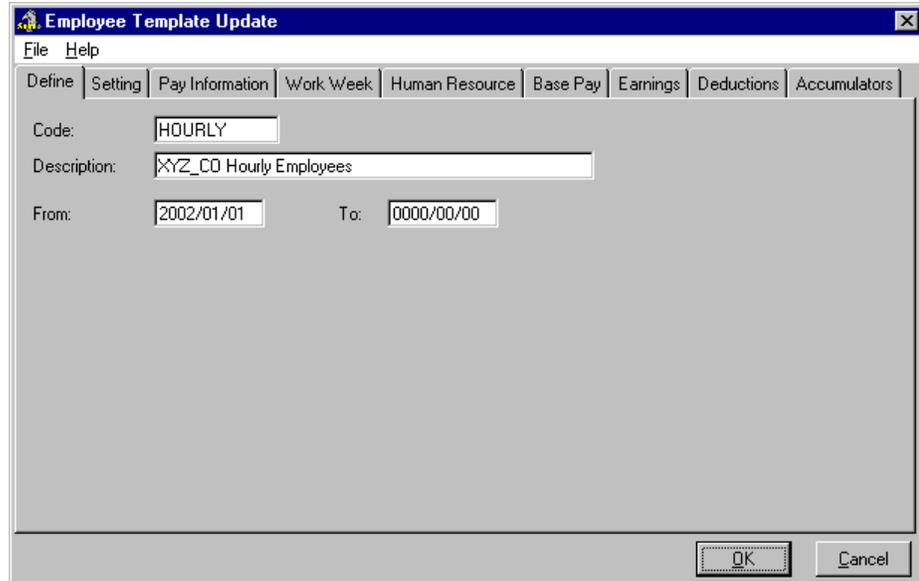
**Fig. 24**
*The Employee Template Update Dialog Box*

**3.** Choose the *Base Pay* tab to access information related to the base earning rates for new employees.
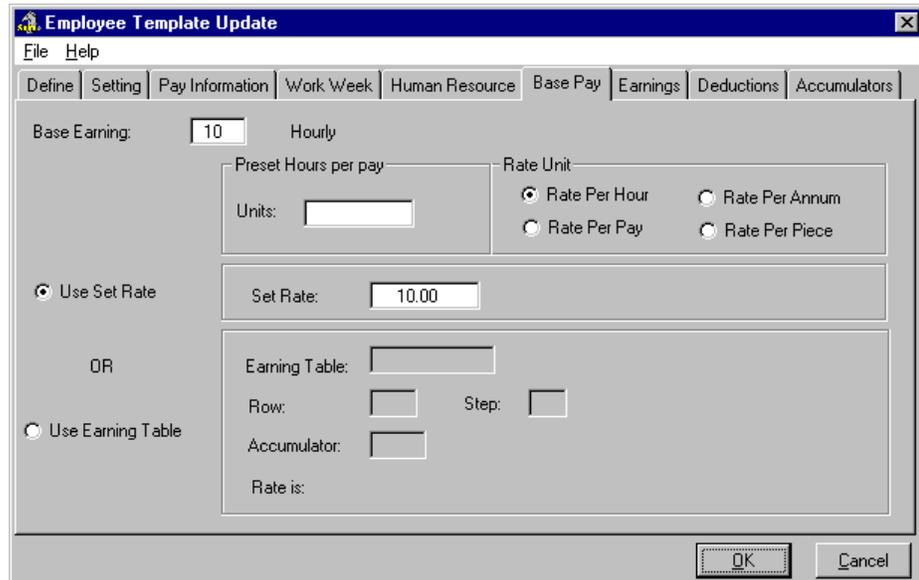


**Fig. 25**
*The Base Pay Tab*

**4.** On the left side of the dialog box, choose the *Use Earning Table* radio button. This action enables the edit fields that appear beside this option.  Now you must further define the earning table that will be assigned to new employees in place of the default earning.

**5.** To define the earning table, place the cursor in the *Earning Table* field and press **<F8>**.  This opens the *Global Earning Tables* dialog box that displays the existing earning tables available for use with this payroll.
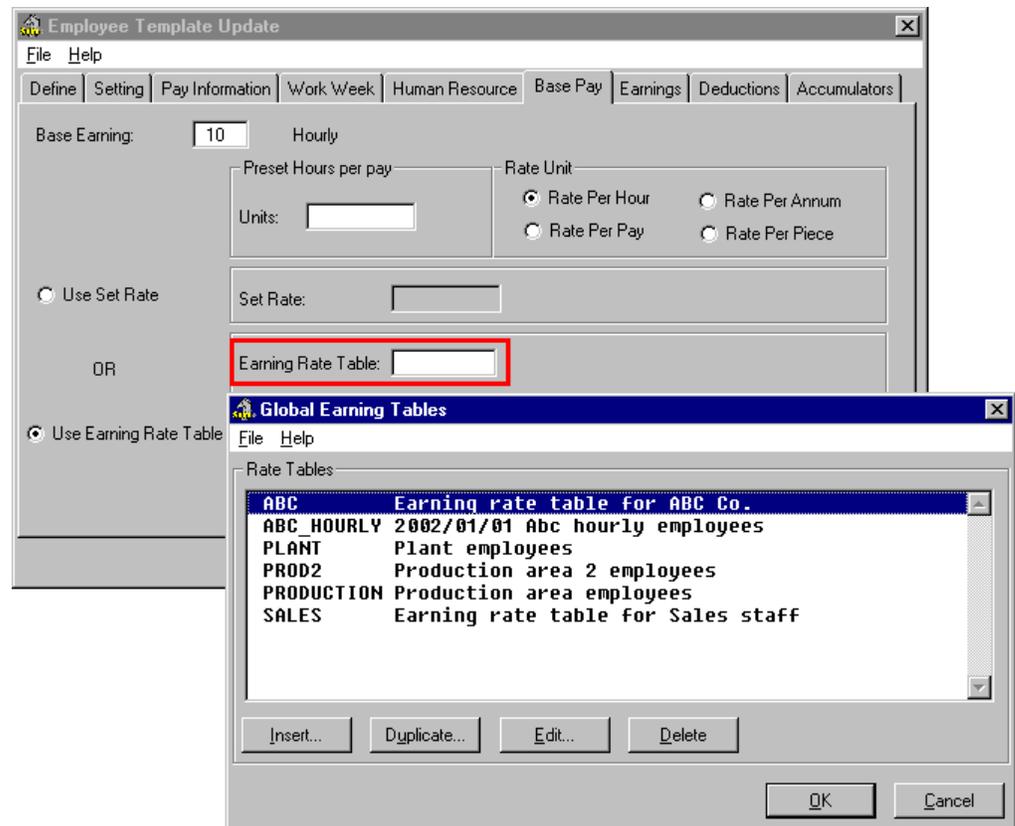
**Fig. 26**
*The Global Earning Tables Dialog Box with 6 Available Earning Tables*

**Note:** If there are no available earning tables in the list, refer to the *Creating Earning Rate Tables* section of this document.

**6.** Select the desired Earning Table from the list (in this example, we will choose *ABC_HOURLY*) then click *OK* to apply it to the current Template.  This closes the *Global Earning Tables* dialog box and adds the name to the *Earning Table* field.
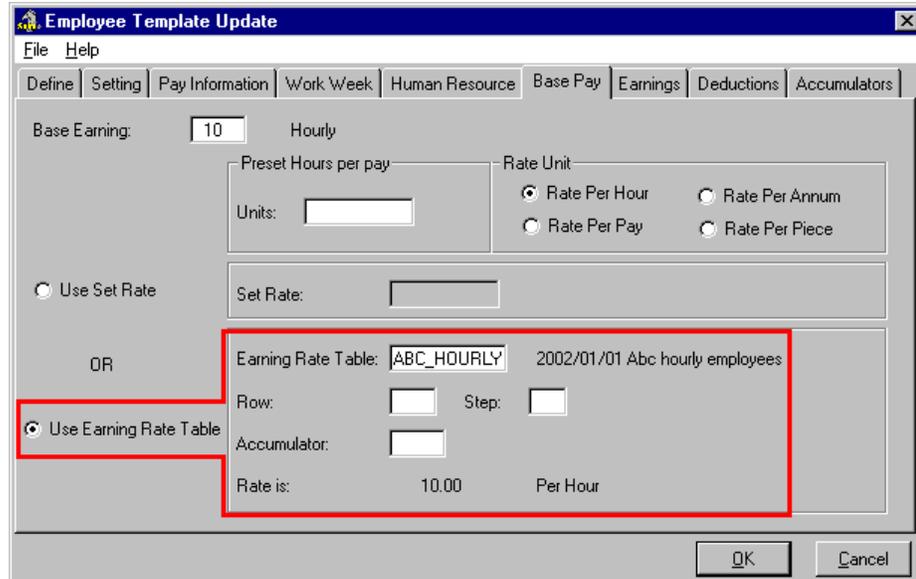
**Fig. 27**
*The Earning Rate Table Applied to the Template*

**7.** Enter the appropriate values in the *Table Row* and/or *Step* number fields that correspond to the assigned Rate Table. Refer to the *Creating Earning Rate Tables* section of this document for more information on Table Row and Step settings.

**8.** Click *OK* to close the dialog box and save the change. The template will now operate based on the settings you specified.

All subsequent employees who are added to the payroll using the HOURLY template will now have their earnings automatically generated using the values in earning rate table you have just assigned.

## Assigning an Earning Rate Table to a Group

Earning Rate Tables can be assigned to a Payroll Condition Group. This group can then be used to load any employees who are associated with the particular earning rate table.

The following section will discuss the creation of a basic Payroll Condition Group that has only one criteria -- those that are assigned a particular earning rate table. To learn more about Groups, refer to the *How To Use Groups* document.

> **Note:** The following section assumes that you have created an earning rate table. If you have not yet created a table, refer to the *Creating Earning Rate Tables* section of this document.

**TO ASSIGN AN EARNING RATE TABLE TO A GROUP:**

**1.** From the *Payroll Module's* **Groups** menu choose the *New - Payroll Condition* command.
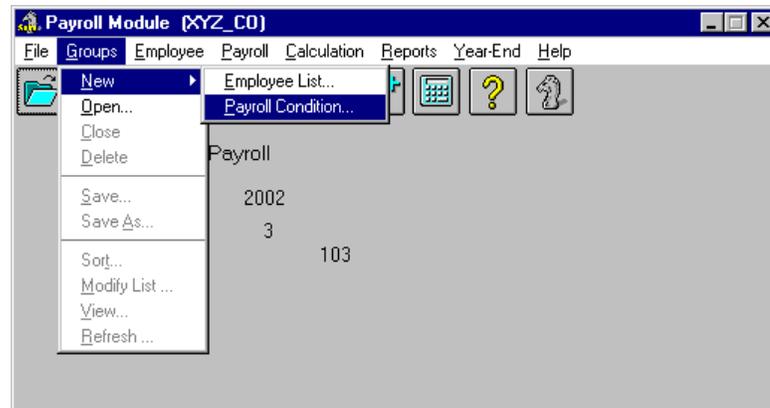
**Fig. 28**
*The New - Payroll Condition Group Command*

This opens the *Payroll Condition Group* dialog box that allows you to specify the conditions that an employee must meet before they can be included in a given group.

**2.** Enter a *Group Code* (name) for the new group along with a brief *Description* that will help you to identify this group in the future.
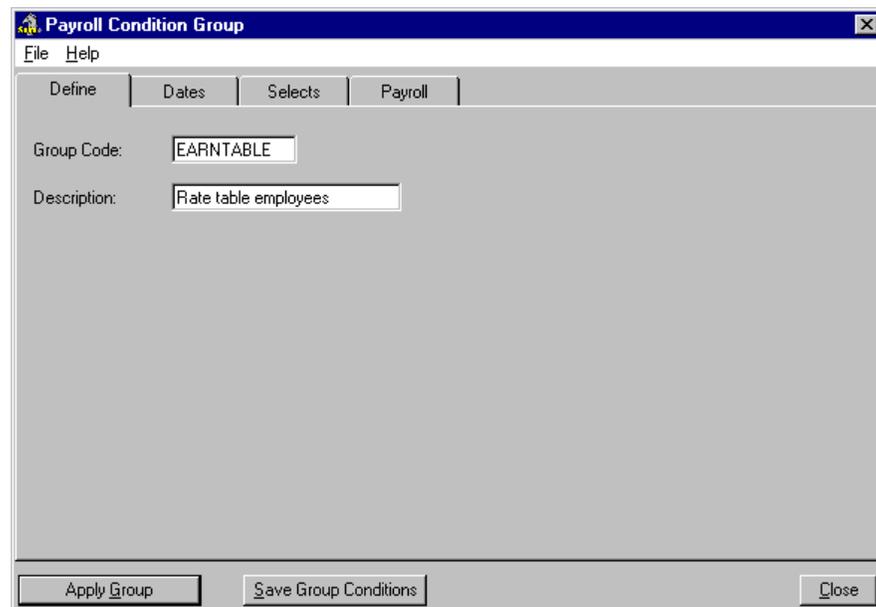


**Fig. 29**
*The Payroll Condition Group Dialog Box with Sample Name and Description*

**3.** Click on the *Payroll* tab.  This tab allows you to create groups that include a specific payroll run, employees that have a specific Earning, Deduction, and/or Accumulator or employees that earn amounts based on a specified Earning Table.
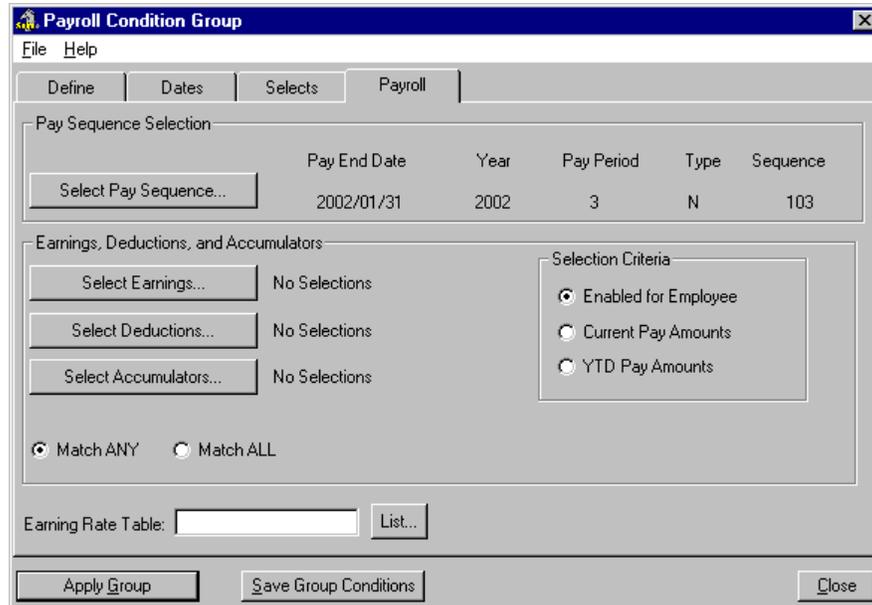
**Fig. 30**
*The Payroll Tab*

As mentioned earlier, this group will have only one criteria -- those employees who are assigned to a pre-existing earning rate table.

**4.**   To define the earning table, choose the *List* button (or place the cursor in the *Earning Table* field and press **<F8>**).  This opens the *Global Earning Tables* dialog box that displays the existing earning tables available for use with this payroll.
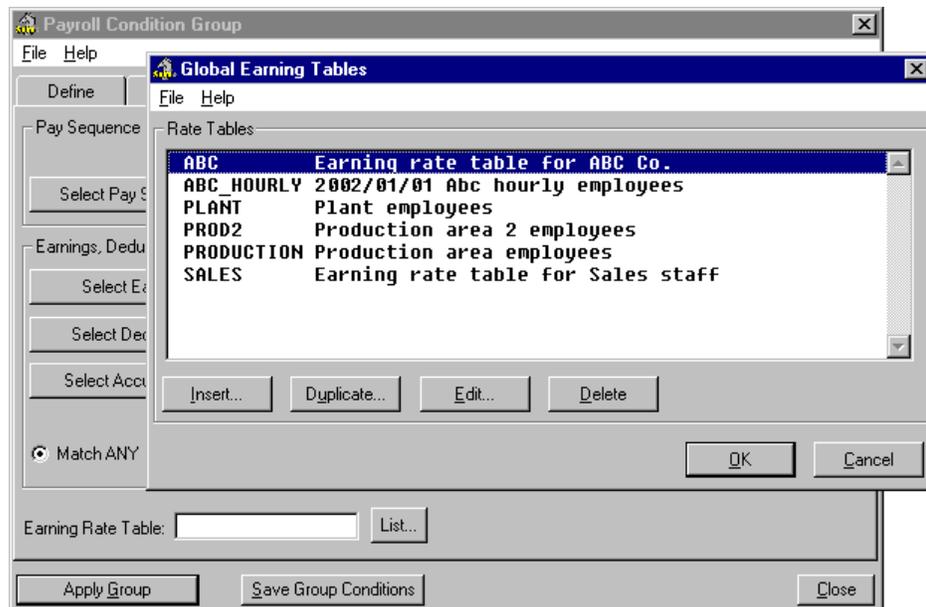


**Fig. 31**
*The Global Earning Tables Dialog Box with 5 Available Earning Tables*

**Note:** If there are no available earning tables in the list, refer to the *Creating Earning Rate Tables* section of this document.

5. Select the desired Earning Table from the list (in this example, we will choose *PRODUCTION*) then click *OK* to apply it to the current Group.  This closes the *Global Earning Tables* dialog box and adds the name to the *Earning Rate Table* field.
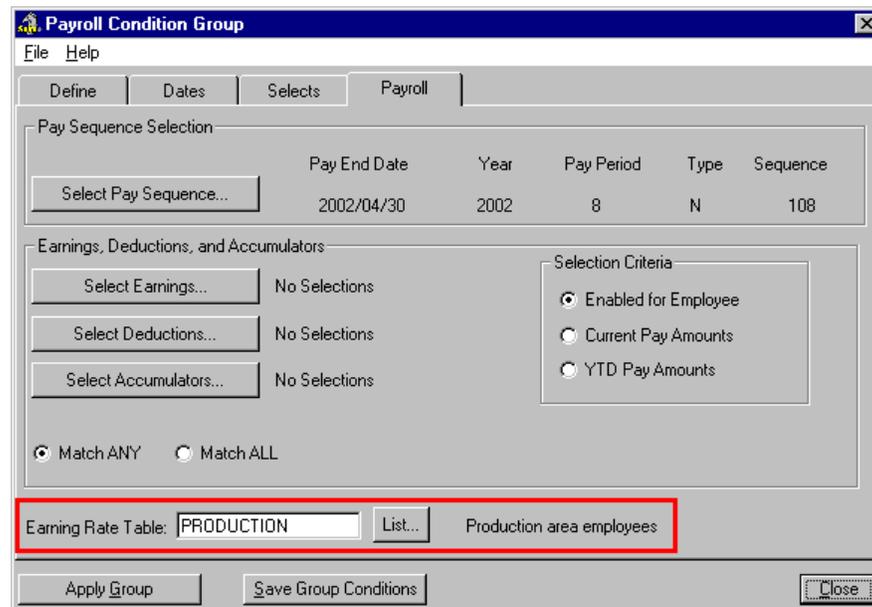


**Fig. 32**
*The Earning Rate Table Assigned to the Group*

6. Choose the *Apply Group* button from the bottom of the *Payroll Condition Group* window.  This enables your Group for the current payroll session and applies each of the defined settings.

   Once the group has been applied, a message appears showing the number of employees that are included in the group, based on your defined condition.

7. Choose the *Close* button to exit the dialog box.  You group is now in use and only those employees who are associated with the PRODUCTION earning Rate Table are loaded.

---

**Note: Saving the Group** - If you plan to use this group in a later session remember to save it before you close the *Payroll Condition Group* dialog box.

## Working at the Employee Level

Earlier at the Payroll level, you assigned Earning Rate Tables using *Positions* and *Templates*.  These methods are best used when working with multiple employees or groups of employees.

However, there are times when you may need to assign an earning rate table on an employee by employee basis.  The *Employee Module* allows you to access the employee-specific data you require to work with Earning Rate Tables on an individual employee basis.

## Rate Table Hierarchy

GrandMaster Suite allows you to assign an earning rate table in several employee-level locations. Therefore is important to know the program's hierarchy when processing an employee's pay according to an assigned table.  The program applies earning rate tables in the following order:

1.  **Hours Entry** - If you assign an earning rate table via the *Positions* field in the *Hours Entry* dialog box, the program will use this rate table in all cases.  For example, if the employee has a different rate table attached to their Salary earning, the program will disregard that earning-based rate table and use the one defined in the *Hours Entry* dialog box.

2.  **Earning Based** - If you attach an earning rate table to an employee earning (e.g. a Salary earning type), the program will use this rate table as long as no other rate table is assigned in the *Hours Entry* dialog box (see above).

3.  **Payroll Specific Information** - If you assign an earning rate table to an employee in the *Payroll Specific Information* dialog box, the program will use this rate table as long as no other tables are assigned (whether in the *Hours Entry* dialog box or attached to any of the employee's earnings).  For example, if you assign the PRODUCTION earning rate table in this dialog box then move to the *Hours Entry* dialog box and specify a different rate table, the table you defined in the *Hours Entry* dialog box will take precedence.

## Assigning an Earning Rate Table During Hours Entry

Earning Rate Tables can be assigned to an employee while you are entering their hours each pay period.  While this method is less automated, your particular payroll needs may necessitate this approach.

As mentioned earlier, when you assign an earning rate table in the *Hours Entry* dialog box, you assure that the assigned table will take precedence over any other table that may be assigned elsewhere.

The only method for defining an earning rate table during the hours entry procedure, is to assign a table that is attached to an existing Position.

> **Note:** The following section assumes that you have created a position to which you have assigned an earning rate table.  If you have not yet created a Position with an attached earning rate table, refer to the *How To Use Positions* document.

**TO ASSIGN AN EARNING RATE TABLE DURING HOURS ENTRY:**

1.  From the *Payroll Module* choose the **Employee- *Hours Entry*** command.

**Fig. 33**
*The Employee - Hours Entry Command*

This opens the *Employee Hours Entry* dialog box that allows you to select a pay sequence and employee so you can begin entering the hours they have worked.
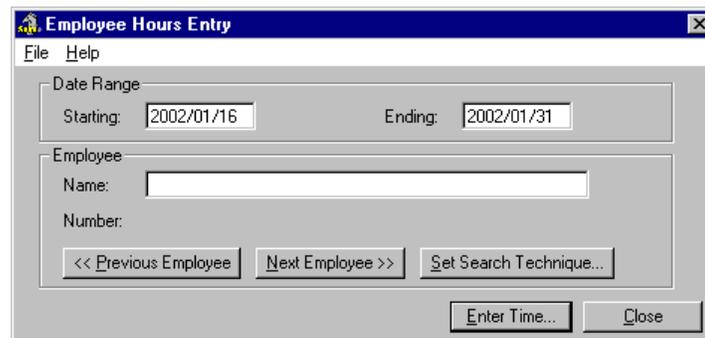


**Fig. 34**
*The Employee Hours Entry Dialog Box*

2.  In the *Starting* and *Ending* fields, define the first and last days of the current pay period.  If you do change these fields, the program will assign the values based on the period after the last closed pay period.

3.  Choose the *Next Employee* button to load the information for the first employee in your list. Depending on the Search Technique you have defined, this may be on a Surname basis (alphabetically) or by their Employee Number or Badge Number (if defined).

    Regardless of the Search Technique defined, an employee's name will appear in the *Name* field.  You are now ready to enter their hours.
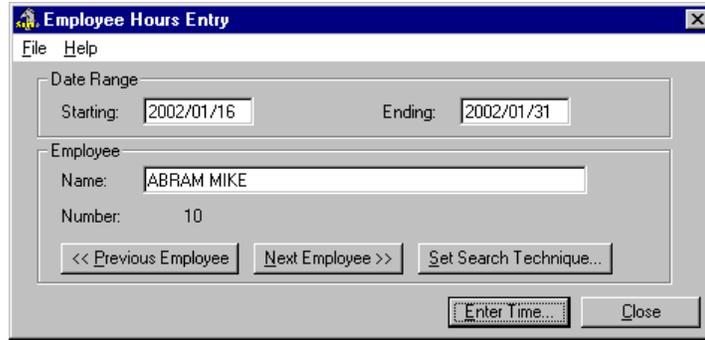
**Fig. 35**
*The Employee Hours Entry Dialog Box with an Employee Loaded*

**4.** Choose the *Enter Time* button to open the *Hours Entry* dialog box.  This is where you can begin entering the actual time your employee has worked during a given pay period.

**Note: Accessing Hours Entry** - The preceding four steps showed how to access the *Hours Entry* dialog box from within the *Payroll Module*.  You can also access the *Hours Entry* dialog box directly from the *Employee Module* by choosing the **Data - *Enter Hours*** command.
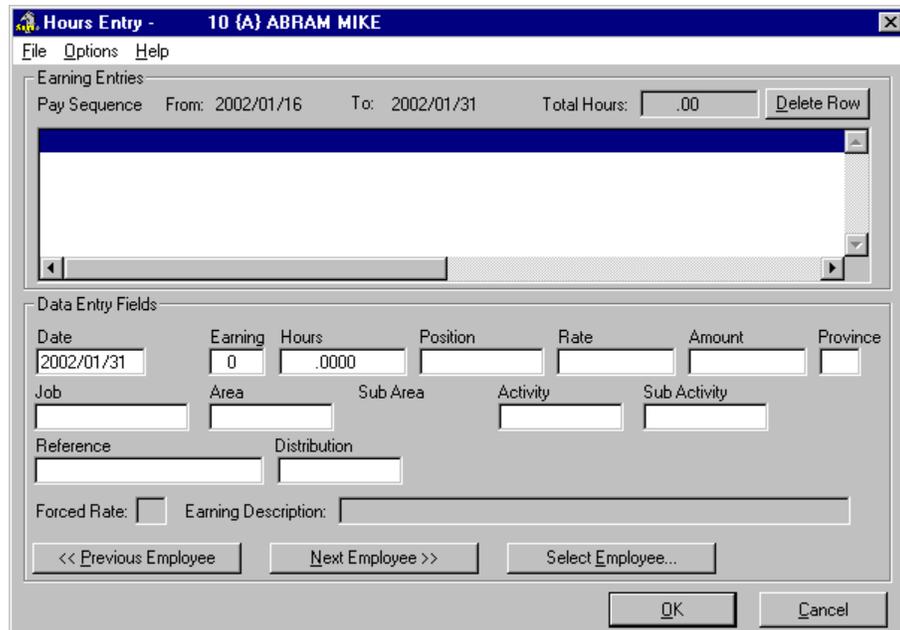


**Fig. 35**
*The Hours Entry Dialog Box*

**Note:  Display Fields** - The *Hours Entry* dialog box shown above may display more edit fields than you have showing in your dialog box.  In most cases, you only need to access a few of the data entry fields when entering your employee hours (thus the other data fields are not required).  You can specify which edit fields to show or hide by choosing the ***Fields to Use*** command from the **Options** menu.

As mentioned earlier, you can only define an earning rate table in this dialog by assigning one that is attached to an existing Position.

**5.** To assign the Position, place the cursor in the *Position* field and press **<F8>**. This opens the *Employee Positions* dialog box that displays the existing Positions available for use with this payroll.
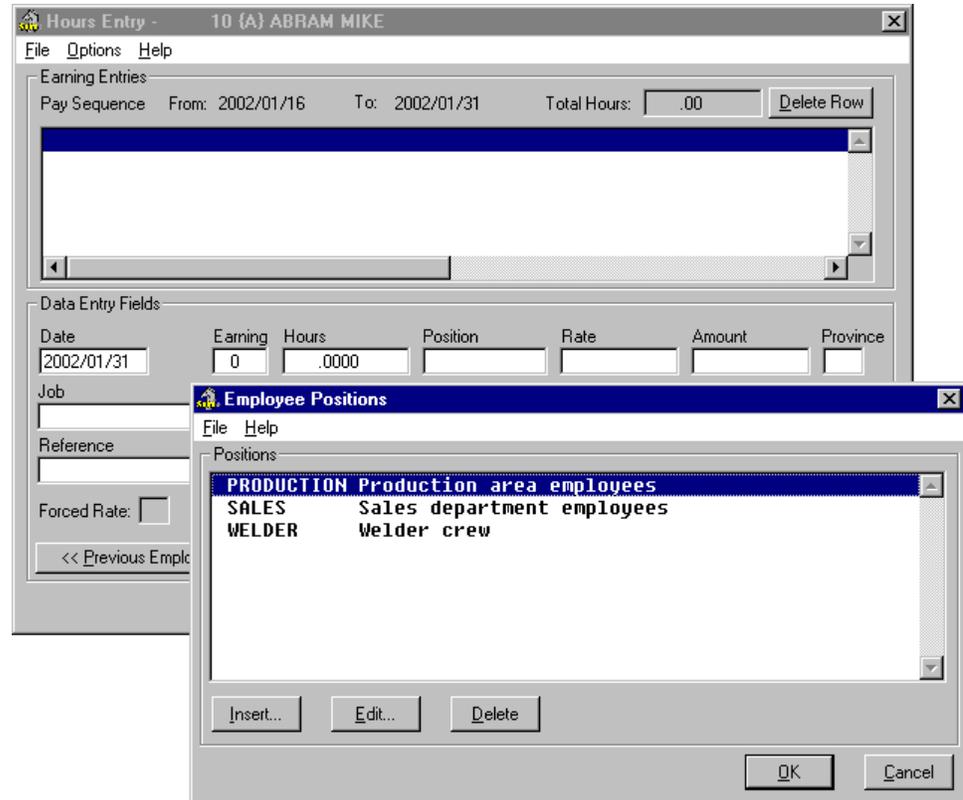


**Fig. 36**
*The Employee Positions Dialog Box with 3 Available Positions*

**Note:** If there are no available positions in the list, refer to the *How to Use Positions* document.

**6.** Select the desired Position that already has an earning rate table assigned (in this example, we will choose *PRODUCTION*) then click *OK* to close the *Employee Positions* dialog box. The selected Position name is now added to the *Position* field.
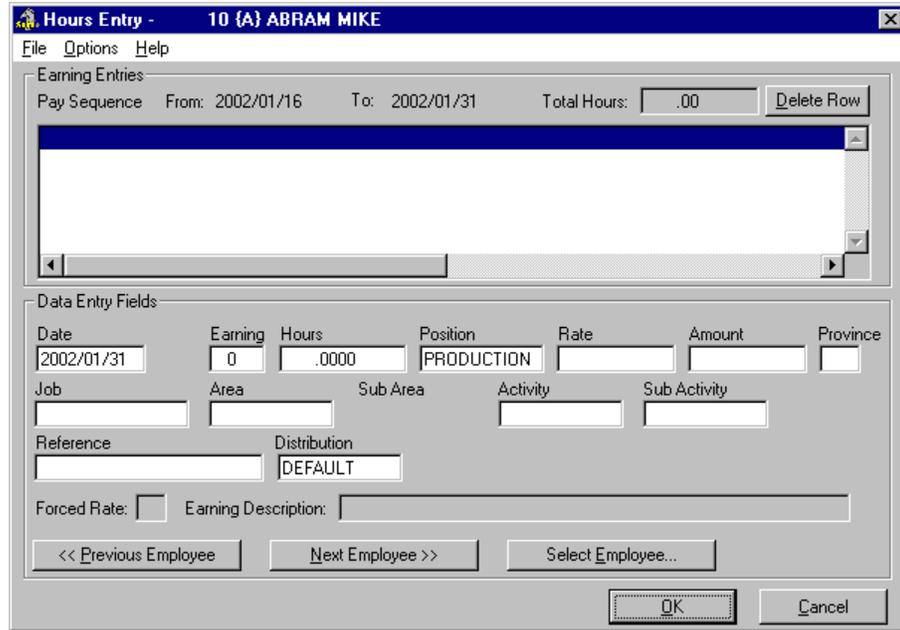
**Fig. 37**
*The Earning Rate Table Applied to the Employee via the Attached Position*

Because the Position has an earning rate table assigned to it, this employee will now have their earnings processed based on the attached rate table.

## Assigning an Earning Rate Table to an Earning

Earning Rate Tables can be assigned directly to an employee earning. This method allows you to override the earning's set rate while still taking advantage of regular earning functions.

This section describes the necessary steps to modify the earning's settings on an employee-by-employee basis.

**TO ASSIGN AN EARNING RATE TABLE TO AN EARNING:**

1.  From the *Payroll Module* choose the **Employee-** *Employee Menu* command.
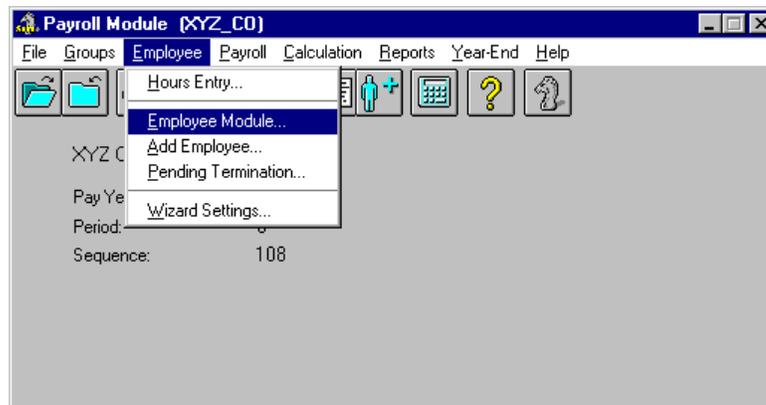


**Fig. 38**
*The Employee Menu Command*

This opens the *Employee Module* where you can update an individual employee's payroll-related information.
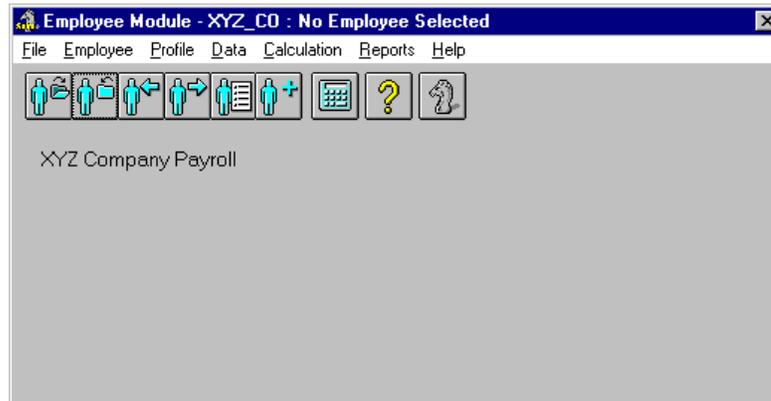


**Fig. 39**
*The Employee Module*

2.  Choose the *Next Employee* icon to load the information for the first employee in your list. Depending on the Search Technique you have defined, this may be on a Surname basis (alphabetically) or by their Employee Number or Badge Number (if defined).

    Regardless of the defined Search Technique, an employee's name will appear in the dialog box's title bar.
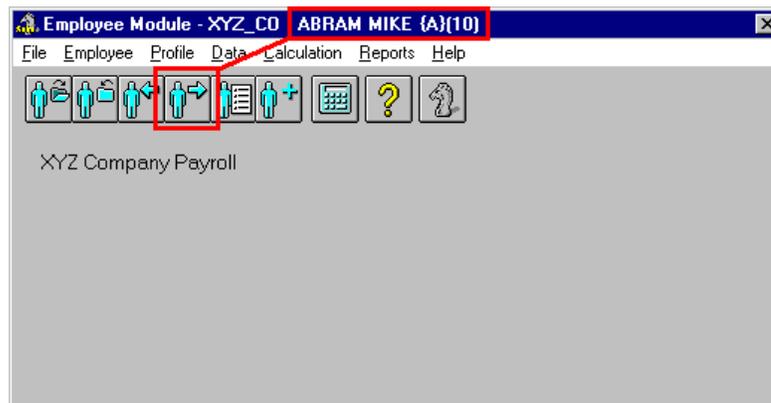


**Fig. 40**
*The Next Employee Icon Loads the Employee's Information*

3.  Choose the **Data - *Earnings*** command.  This displays the *Earnings for <Employee>* dialog box where you can work with existing earnings.
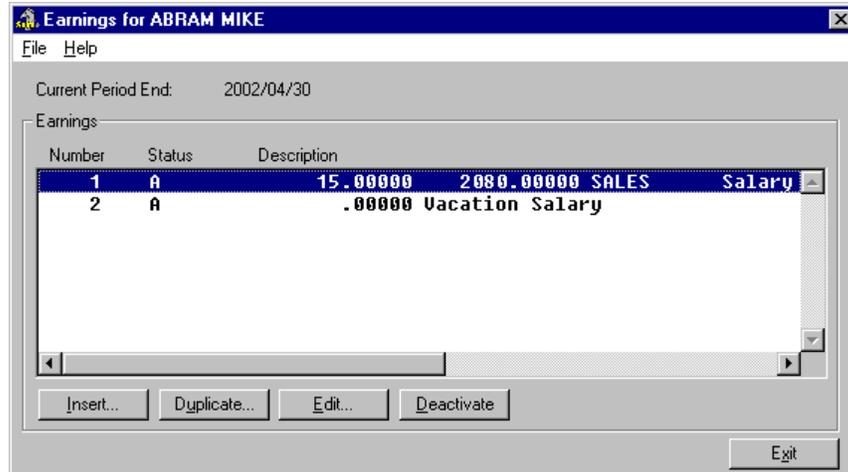
**Fig. 41**
*The Earnings for <Employee> Dialog Box*

4.  Select the earning you wish to modify by clicking on it once with the mouse.  This highlights the row in the list.  In our example we will choose the *Salary* earning.

5.  Choose the *Edit* button.  This opens the *Employee Earning* dialog box so you can view or edit the various data fields.  You can also double-click on the earning to open this dialog box.
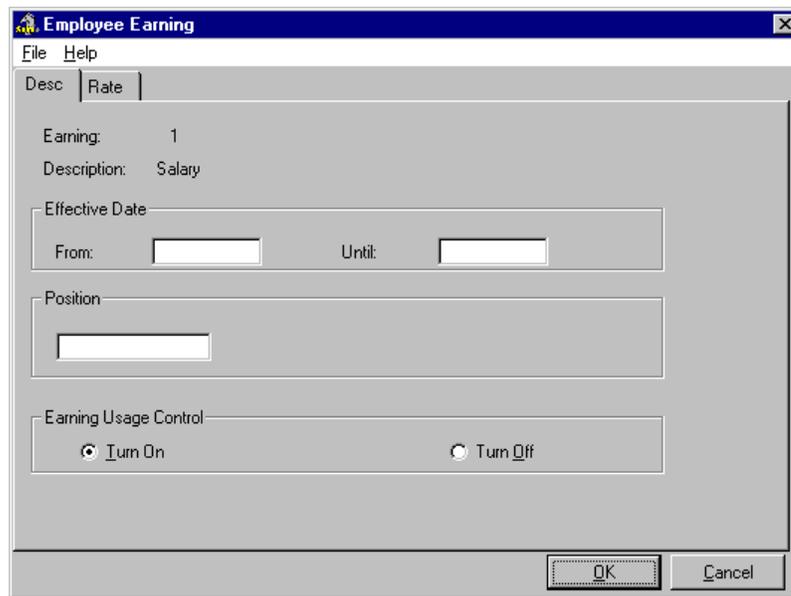


**Fig. 42**
*The Employee Earning Dialog Box*

The *Description* tab displays basic information for the earning such as the name, effective dates and any Positions that may be assigned.  Depending on the settings for your earning, your dialog box may display other settings.

The *Rate* tab contains the editing fields that will instruct this earning to use an earning rate table instead of its *Set Rate* value.  If this dialog box does not contain a *Rate* tab, please view the **Note** below.

---

**Note:  The Rate Tab** - If your *Employee Earning* dialog box does not contain a *Rate* tab, you will have to activate a Payroll-level option for the specific earning as follows:

**1.**  Open the *Payroll Module* and choose the **Payroll - *Earnings*** command.
**2.**  Double-click the desired earning then choose the *Control* tab in the dialog box that appears.
**3.**  Place a check in the *Allow Modification at Employee Level* checkbox.
**4.**  Click *OK* to accept the change then close the dialog boxes.

The *Rate* tab will now be visible and you can make changes to this earning at the employee level.

---

**6.**  Click on the *Rate* tab then select the *Rate Table* radio button near the top of the dialog box. This enables the edit fields in the *Rate Table Parameters* section near the bottom of the tab.
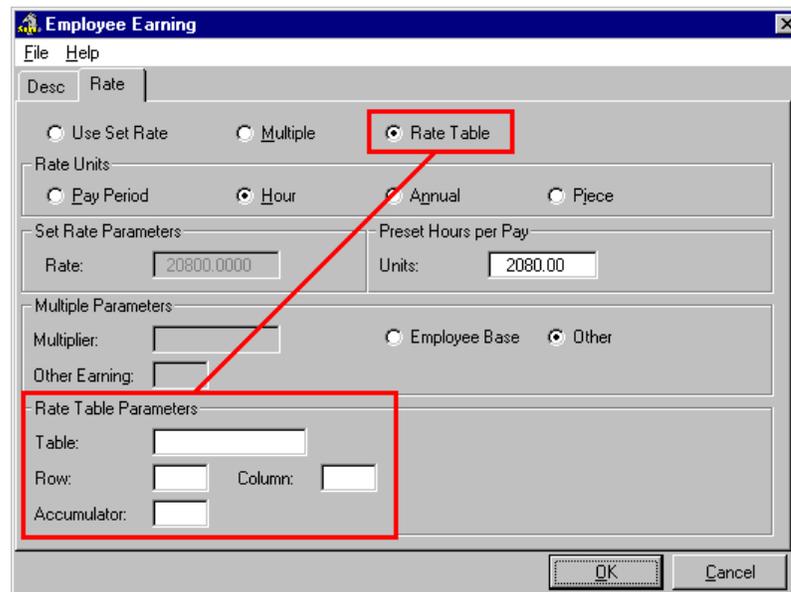


**Fig. 43**
*The Rate Table option enables the edit fields in the Rate Table Parameters section.*

**7.**  To define the earning table, place the cursor in the *Table* field and press **<F8>**.  This opens the *Global Earning Tables* dialog box that displays the existing earning tables available for use with this payroll.
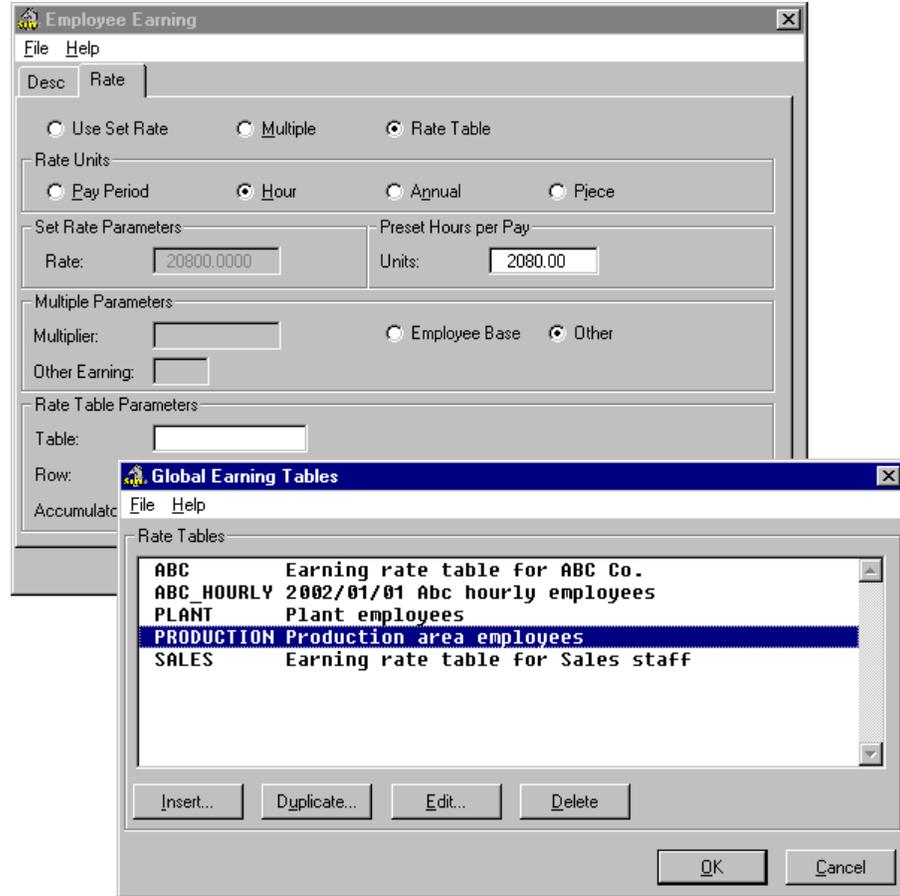
**Fig. 44**
*The Global Earning Tables Dialog Box with 5 Available Earning Tables*

> **Note:** If there are no available earning tables in the list, refer to the *Creating Earning Rate Tables* section of this document.

**8.**   Select the desired Earning Table from the list (in this example, we will choose *PRODUCTION*) then click *OK* to apply it to the current earning for this employee only.  This closes the *Global Earning Tables* dialog box and adds the name to the *Table* field.

**9.**   Enter the appropriate values in the *Table Row* and/or *Step* number fields that correspond to the assigned Rate Table.  Refer to the *Creating Earning Rate Tables* section of this document for more information on Table Row and Step settings.

**Fig. 45**
*The Earning Rate Table Applied to this Employee's Earning.*

**10.** Click *OK* to close the dialog box and save the change. The earning will now operate based on the updated settings you specified.

When the pay is calculated for this employee, the set rate will no longer apply, but rather the attached earning rate table will be used.

## Assigning an Earning Rate Table While Adding an Employee to the Payroll

GrandMaster Suite allows you to assign an earning rate table to an employee at the time the employee is being added to the payroll. This can be done through the use of the *Add Employee Wizard* or through the *Add Employee* dialog box.

The first section will discusses how to assign an earning rate table while adding the employee to the payroll. The latter section will discuss the table assignment while using the Add Employee Wizard.

**Note:** The following two sections assume that you have created an earning rate table. If you have not yet created a table, refer to the *Creating Earning Rate Tables* section of this document.

**TO ASSIGN AN EARNING RATE TABLE WHILE ADDING A NEW EMPLOYEE:**

**1.** With a payroll selected, choose the *Add Employee* command from the **Employee** menu. This displays the *Employee Name Selection* dialog box.
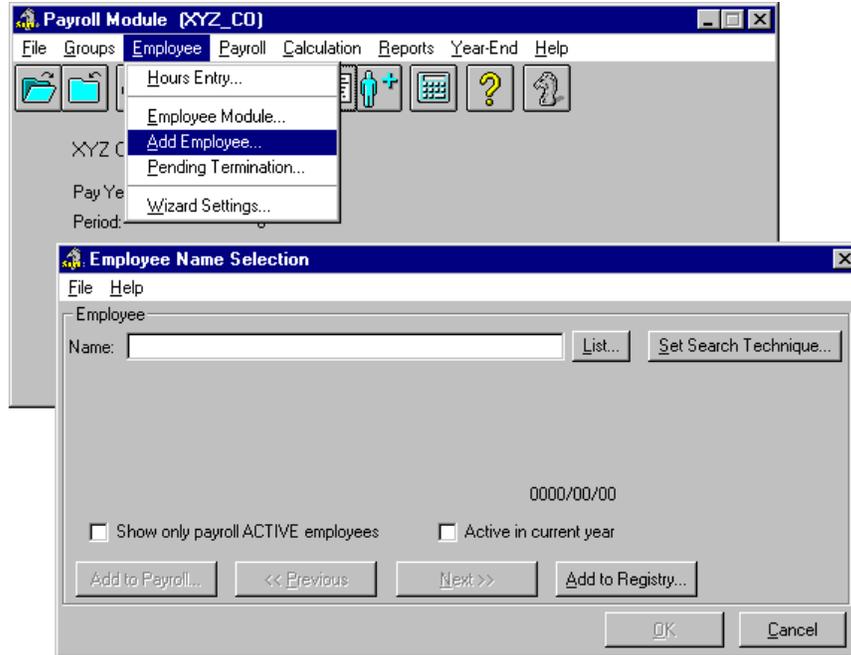
**Fig. 46**
*The Add Employee Command Opens the Employee Name Selection Dialog Box*

2.   Enter the name of the new employee in the *Name* field.  Enter the surname first, followed by the given name (e.g. Labarriere Chris).  If you think the employee may already exist in the payroll, enter the first few characters of the name then choose the *List* button to view employees who have a similarly spelled name.

3.   Once the name is entered, choose the *Add to Registry* button.  This closes the dialog box and displays the *Employee Information* dialog box where you can add detailed information about the employee.
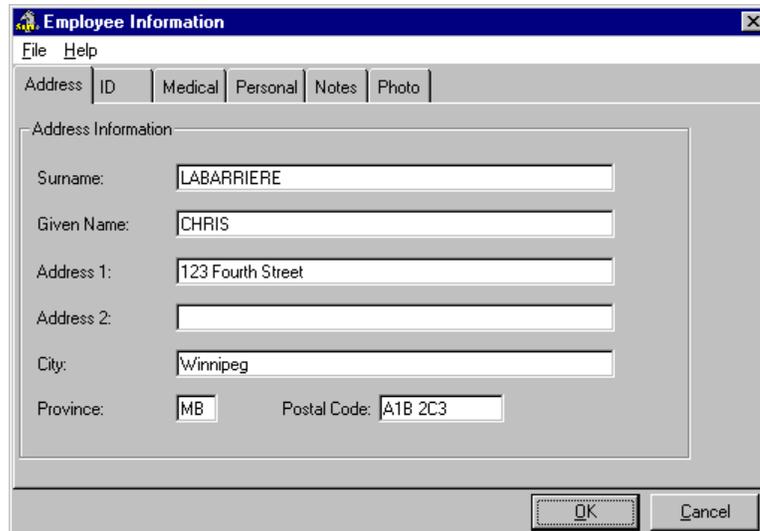


**Fig. 47**
*The Employee Information Dialog Box*

4.   Move through each of the six tabs completing the information as required.  Certain fields require a value while other fields are optional in nature.

**5.** Once you have completed the information in each tab, choose the *OK* button. This closes the *Employee Information* dialog box and returns you to the *Employee Name Selection* dialog box. You will notice that the title of this dialog box has changed to an instructional line that states *Select "Continue" to Add Employee to payroll or "Add" to add another to registry*.
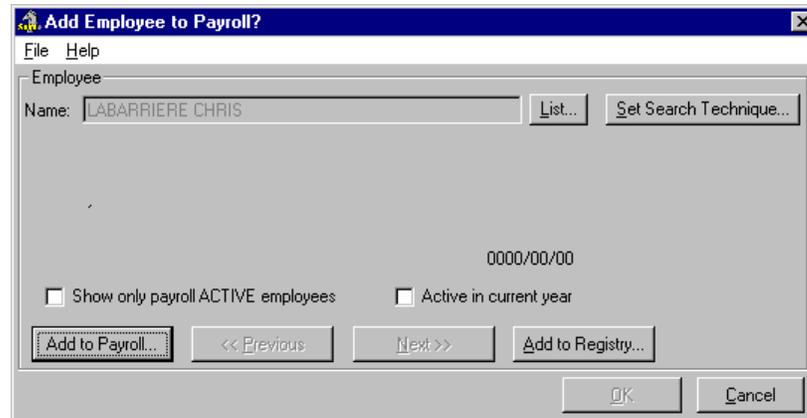


**Fig. 48**
*The Updated Dialog Box*

- If you choose the *Add to Payroll* button, you will move forward in the employee creation process (which is what this particular lesson requires).

- If you choose the *Add to Registry* button, you will be given the opportunity of adding more employees to the registry. You would then need to add them to the payroll at a later time.

**6.** Choose the *Add to Payroll* button to proceed with the add employee process. This displays the *Add Employee to Payroll* dialog box.
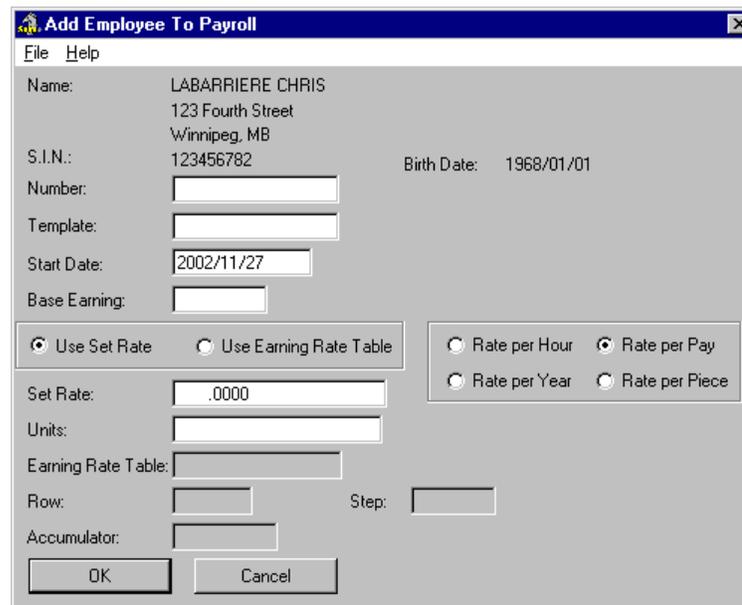


**Fig. 49**
*The Add Employee to Payroll Dialog Box*

The bottom half of the dialog box displays the employee's earning-related information. Notice that the *Use Set Rate* option is activated by default.  You will need to change this option to use an earning table instead of a static rate.

**7.**  Select the *Use Earning Table* radio button to activate the Rate Tables feature for this employee.  The *Set Rate* field becomes grayed and the *Earning Table* fields become active.
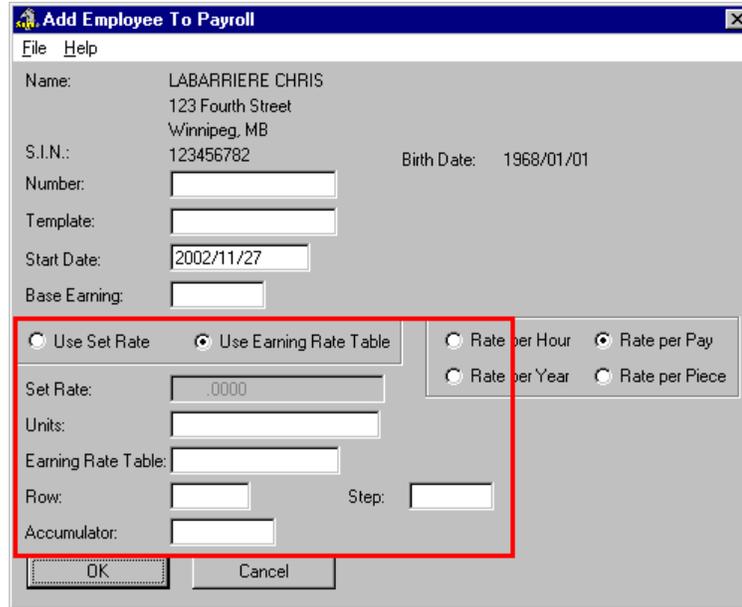


**Fig. 50**
*The Use Earning Table Button Activates the Earning Table Fields*

**8.**  Place the cursor in the *Earning Table* field and use the **<F8>** key to choose the desired table from the list.  If no Earning Rate Tables appear in the list, refer to the *Creating Earning Rate Tables* section of this guide for more information.
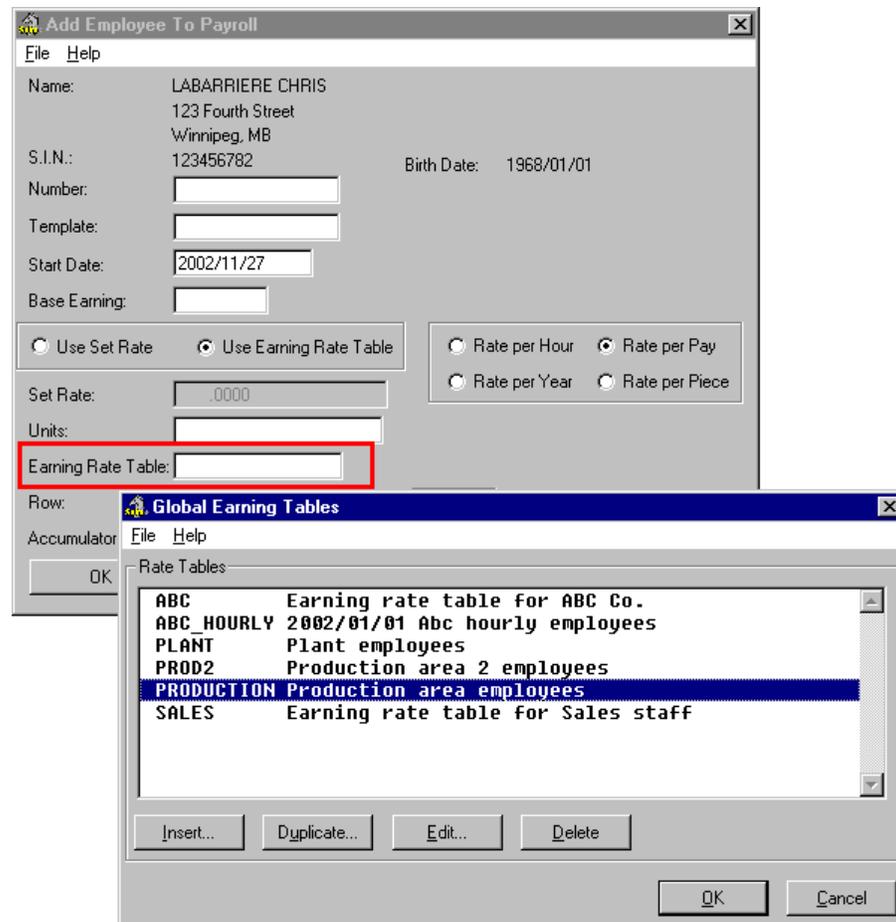
**Fig. 51**
*The Global Earning Tables Dialog Box with 6 Available Earning Tables*

**Note:** If there are no available earning tables in the list, refer to the *Creating Earning Rate Tables* section of this document.

**9.** Select the desired Earning Table from the list (in this example, we will choose *PRODUCTION*) then click *OK* to apply it to the current employee.  This closes the *Global Earning Tables* dialog box and adds the name to the *Earning Rate Table* field.

**Fig. 52**
*The Earning Rate Table Applied to the Employee*

**10.** Enter the appropriate values in the *Row* and/or *Step* number fields that correspond to the assigned Rate Table.  Refer to the *Creating Earning Rate Tables* section of this document for more information on Table Row and Step settings.

**11.** Click *OK* to close the dialog box and proceed with the remaining steps in the Add Employee process.  Once you process the employee's first pay, they will have their earnings generated automatically using the values in earning rate table you have just assigned.

The next section will discuss how to assign an earning rate table to an employee if you are using the *Add Employee Wizard*.  Assigning a rate table while using the Wizard is very similar to the preceding section's first **10** steps.  Thus, the following section will refer to this section's instructions for the first few steps.

> **Note:** The following section assumes that you have enabled the Add Employee Wizard for use in your payroll.  If you have not yet enabled this feature, refer to the *Enabling the Add Employee Wizard* section of this document.

**TO ASSIGN AN EARNING RATE TABLE USING THE ADD EMPLOYEE WIZARD:**

**1.** Add the employee and assign an earning rate table (as discussed in the preceding section's first **10** steps).  This completes the preliminary data entry steps and displays the first step in the *Add Employee Wizard*.
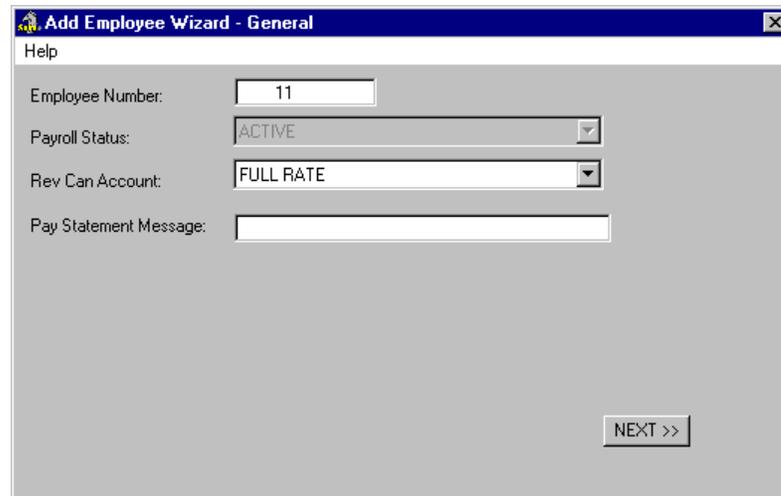
**Fig. 53**
*The Add Employee Wizard - General Step*

**2.** Proceed through the remaining Wizard steps to complete the Add Employee process.

Once you process the employee's first pay, they will have their earnings generated automatically using the values in earning rate table you have just assigned.

## Enabling the Add Employee Wizard

You must enable the Add Employee Wizard before you can use it to add your employees to your payroll. This can be done via a command in the *Payroll Module* dialog box.

**TO ENABLE THE ADD EMPLOYEE WIZARD:**

**1.** From the *Payroll Module*, choose the **File - *Properties - Settings*** command.
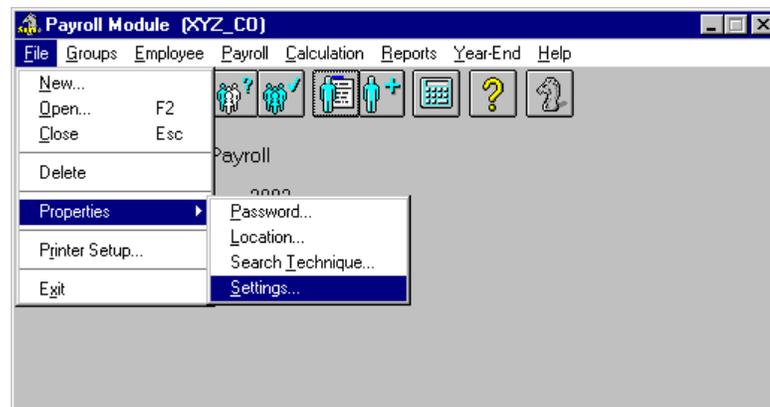


**Fig. 54**
*The Properties - Settings Command*

This opens the *Settings* dialog box.

**2.** Select the *Enable* radio button under the *Add Employee* section. This activates the other options associated with the wizard.
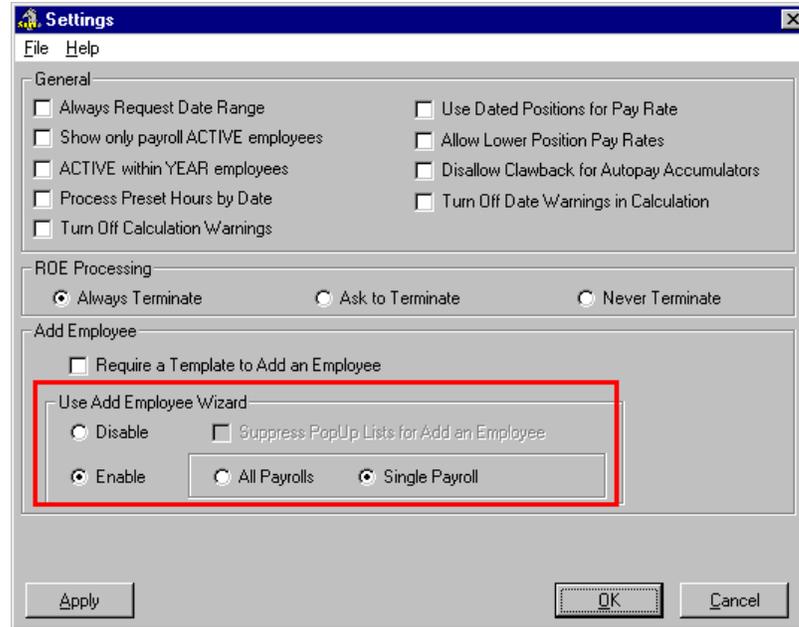
**Fig. 55**
*The Add Employee Wizard Enabled*

3.   Click *OK* to close the dialog box and save the change.  The *Add Employee Wizard* will now operate the next time you add an employee to your payroll.

## Assigning an Earning Rate Table in Payroll Specific Information

Earning Rate Tables can be assigned to an existing employee at any time.  This may be useful if have one or more employees existing in the payroll who do not have an associated earning rate table.

The *Payroll Specific Information* dialog box allows you to define an earning rate table in several ways.

- Assign a Position that has an attached earning rate table.

- Updating the employee's assigned Template with a new template that has an attached earning rate table

As mentioned earlier, when you assign an earning rate table to an employee in the *Payroll Specific Information* dialog box, the program will only use this rate table as long as no other tables are assigned elsewhere.

**Note:** The following section assumes that you have created an earning rate table.  If you have not yet created a table, refer to the *Creating Earning Rate Tables* section of this document.

**TO ASSIGN AN EARNING RATE TABLE IN THE PAYROLL SPECIFIC INFORMATION DIALOG BOX:**

1.   Open the *Employee Module* and select the employee to which you would like to assign the earning rate table.  You can open an employee using the **Employee - *Open*** command or by choosing the *Previous, Next* or *List Employee Icons* until the desired employee's name appears in the title bar.

**Fig. 56**
*The Previous, Next and List Employee Icons*

2. Once the employee is selected, choose the *Payroll Specific Info* command from the **Data** menu.
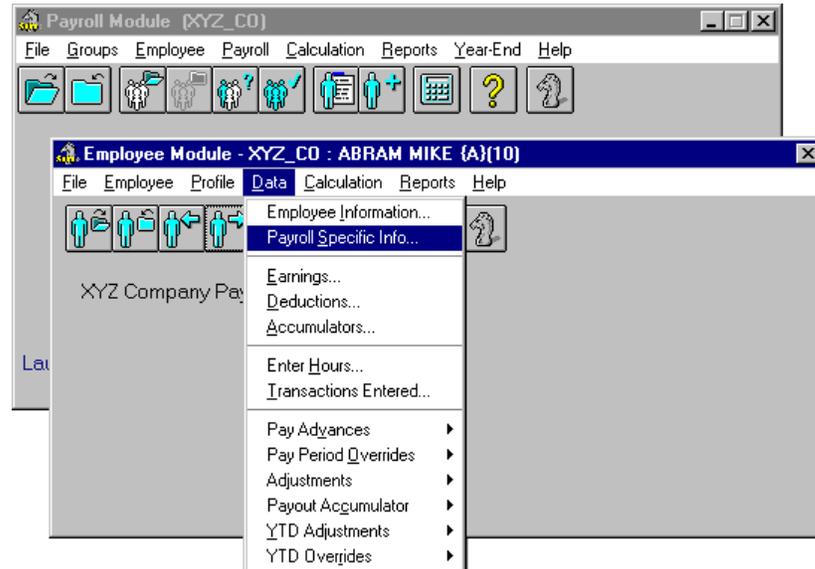


**Fig. 57**
*The Payroll Specific Info Menu Command*

This opens the *Payroll Specific Information* dialog box that allows you to define a wide variety of payroll-related data for the employee.
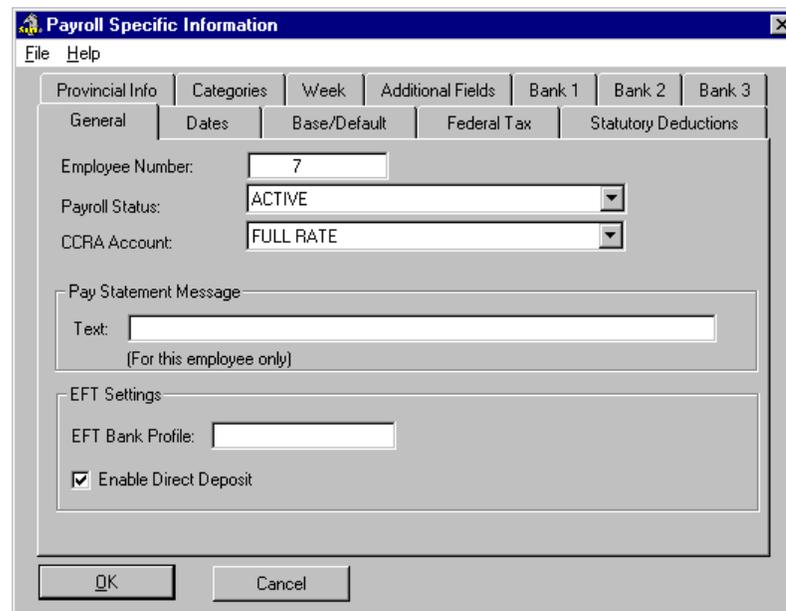


**Fig. 58**
*The Payroll Specific Information Dialog Box*

For this lesson, we will only require the use of the *Base/Default* tab need to assign the earning rate table.

3.  If you are assigning an earning rate table that is attached to a Position, proceed to the following step (**Step 4**).  If you are assigning an earning rate table that is attached to an employee template, skip forward to **Step 7**.

4.  Choose the *Base/Default* tab then place the cursor in the *Position* field and press **<F8>**.  This opens the *Employee Positions* dialog box that displays the existing Positions available for use with this payroll.
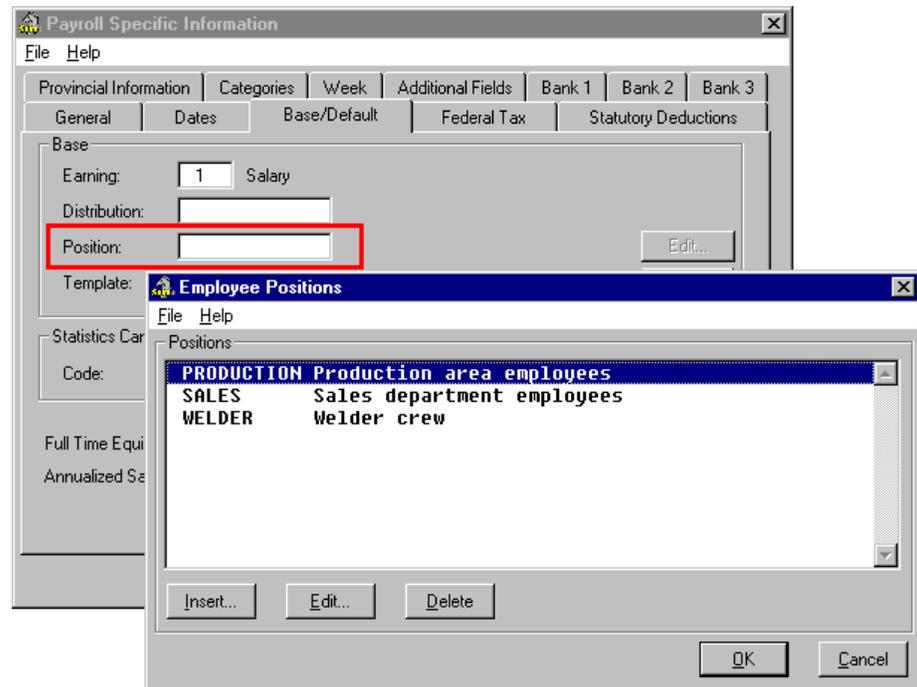


**Fig. 59**
*The Employee Positions Dialog Box with 3 Available Positions*

**Note:** If there are no available Positions in the list, refer to the Online Help for more information on how to create a Position.

5.  Select the desired Position **that has the attached earning rate table** then click *OK* to apply it to the employee.  This closes the *Employee Positions* dialog box and adds the name to the *Position* field.  The text label beside the *Position* field also updates to show the name of the selected Position.

**Fig. 60**
*The Position (with attached Earning Rate Table) Applied to the Employee*

**6.** Click *OK* to apply the change and you are returned to the *Employee Module*.

The next time you process the employee's pay, they will have their earnings generated automatically using the values in earning rate table you have just assigned (through the associated Position).

**7.** If you have an earning rate table associated with an employee Template, choose the *Edit* button located to the right of the *Template* field (or if the *Template* field is enabled, place the cursor inside and press **<F8>**).  This opens the *Assigned Template* dialog box.



**Fig. 61**
*The Assigned Template Dialog Box*

**8.** Place the cursor in the *Template* field and press **<F8>**.  This opens the *Employee Templates* dialog box that displays the existing employee templates available for use with this payroll.
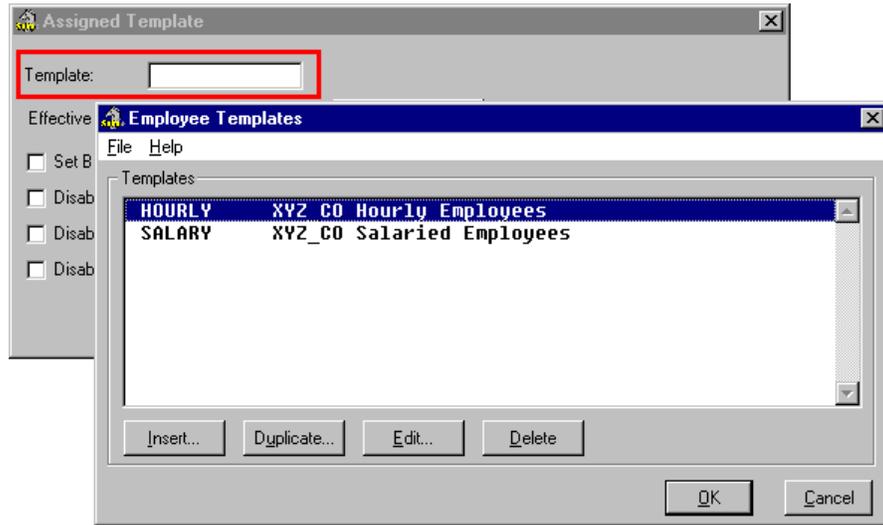


**Fig. 62**
*The Employee Templates Dialog Box with 2 Available Templates*

**Note:** If there are no available employee templates in the list, refer to the *Employee Templates Update* online help topic.

**9.** Select the desired template **that has the attached earning rate table** then click *OK* to apply it to the employee.  This displays a message prompting you to accept or reject the employee update procedure.
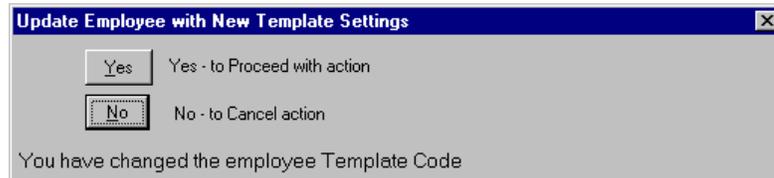


**Fig. 63**
*The Update Employee Message*

**10.** Choose *Yes* to proceed.  This closes the message box and adds your selection to the *Template* field.

**11.** Enter an *Effective Date* for the template.  This is the date that the template will be in force when processing this payroll.
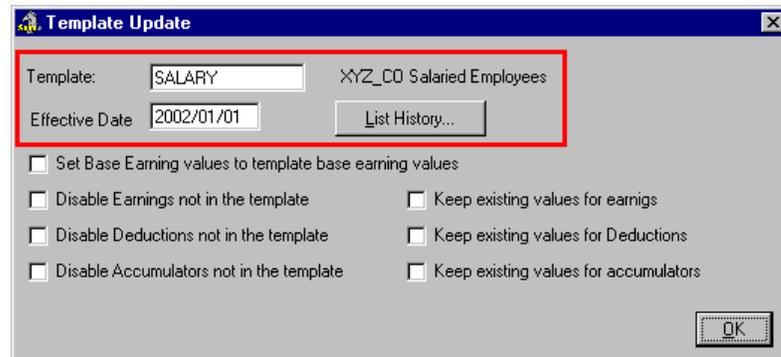
**Fig. 64**
*The Completed Template Update Dialog Box*

**12.** Click *OK* to close the dialog box and accept the changes.  This closes the *Template Update* dialog box and adds the name to the *Template* field.  The text label beside the *Template* field also updates to show the name of the selected template.
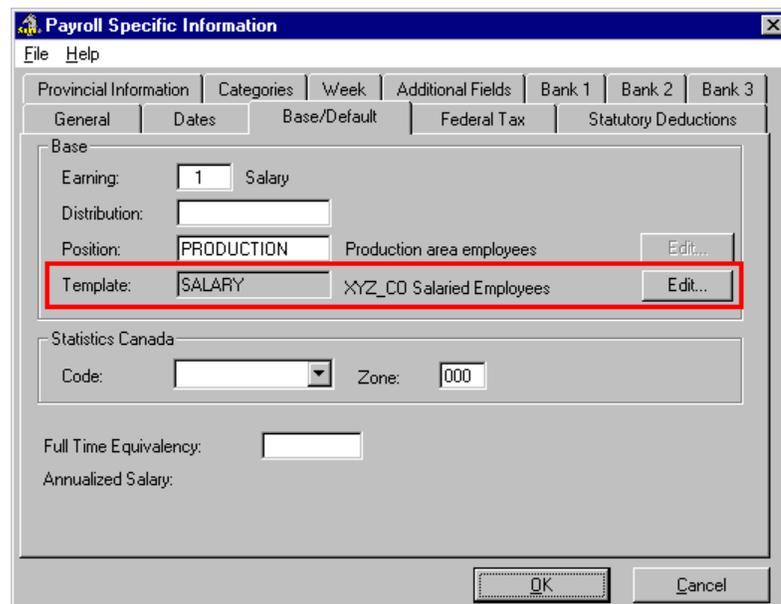


**Fig. 65**
*The Template (with attached Earning Rate Table) Applied to the Employee*

**13.** Click *OK* to close the dialog box and save the changes.  Depending on your settings, you may receive another message prompting you to accept or reject the employee update procedure.  Choose *Yes* if the message appears.

The next time you process the employee's pay, they will have their earnings generated automatically using the values in earning rate table you have just assigned (through the associated Template).

**This document to be completed.  Please check www.canpay.com for updates!**