How to Use GrandMaster Suite

Working with Groups
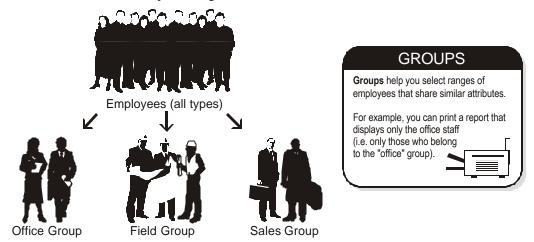
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How to Use GrandMaster Suite - Groups

Overview

Simply defined, a Group is a list of employees that share like data. **GrandMaster Suite** uses groups to select ranges of employees for calculation and printing purposes. These ranges can be sorted and saved for future processing.

Employees (all types)

Office Group   Field Group   Sales Group

GROUPS

Groups help you select ranges of employees that share similar attributes.

For example, you can print a report that displays only the office staff (i.e. only those who belong to the "office" group).
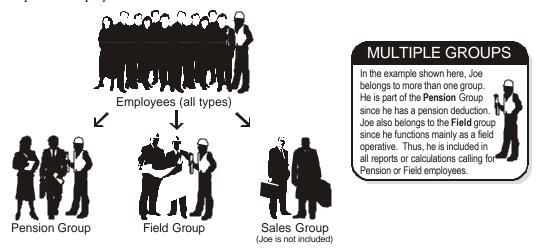
When Should I Use a Group?

- Groups should be used when you need to select a different calculation type apart from a normal pay run. Such calculations can include Additional, Extra or Reversal runs. Essentially, any function that requires you to specify certain employee types.

  For example if you needed to prepare a bonus run for employees in the plant, you could create a group for your "Plant" employees. Another example would be if you needed to process a pay reversal for a specific employee. In this case, you would create a group by selecting from the employee list.

- Groups are also useful when you require a report based on employees with specific parameters. For example if you wish to create a report of all employees with a Pension deduction.

- Use a group to divide a large payroll into multiple groups with a separate payroll, then assign an administrator to be responsible for their own group. In a multiple branch operation each branch could be responsible for entering their individual payroll information -- the payroll could then be processed or calculated globally for all branches.

- Create a group when your payroll function calls for an additional, extra or reversal pay.

- Use a group when you need to create a report that only includes certain types of employees.

- Create a group when your time cards need to be sorted by department.

- A group can be created any time you require it. There may be many different reasons based on your unique company's requirements.

Use Groups in Every Module

Groups can be used in any or all of the program modules (e.g. Payroll, Human Resources, Scheduling, etc.) to control various forms of processing. Since you only have to set up the group once, you have the flexibility of being able to use it in under many circumstances.

Employees Can Belong to Multiple Groups

A given employee can belong to more than one group. This is a common occurrence since many employees share similar working benefits (but perform varied tasks). If an employee is part of more than one group, their data will appear on all reports (or in all calculations) that call for the group to which they belong.

For example, a given employee (Joe) may belong to the Pension group but also belong to other divisional groupings such as the Sales force. The result is that any reports asking for Sales group or pension employees will show data for Joe.

Employees (all types)

Pension Group   Field Group   Sales Group
(Joe is not included)

MULTIPLE GROUPS

In the example shown here, Joe belongs to more than one group. He is part of the **Pension** Group since he has a pension deduction. Joe also belongs to the **Field** group since he functions mainly as a field operative. Thus, he is included in all reports or calculations calling for Pension or Field employees.

How Does it Work In GrandMaster Suite?

GrandMaster Suite provides two methods for creating groups. Both may be suitable for your needs depending on the amount of employees you have and the types of functions you wish to perform.

- **EMPLOYEE LIST** - Also referred to as a "Fixed" list group. This method allows you to randomly select employees from a list. Since this group type is fixed, it must be manually modified if changes to the group are required. This group type is most commonly used for calculating payrolls between pay periods. Such calculations can include Additional, Extra or Reversal pay calculations.

  See the **Fixed Groups** section later in this chapter for more information about this group type.

- **PAYROLL CONDITIONS** - This method allows **GrandMaster Suite** to dynamically create a group based on a given payroll condition or group of conditions. Essentially, each time this group is loaded, **GrandMaster Suite** will build the group from the database including only those employees who meet the specified condition(s). For example, you could create a group named "Overtime" that includes only those employees that have overtime hours for a current pay period. You could then run a report that would include only the "overtime" group and exclude all other employees.

See the **Payroll Condition Groups** section later in this chapter for more information about this group type.

> **Note: Maximum Number of Employees** - A maximum of 10000 employees may be present in an employee group.

Group Selection

When you select a group in **GrandMaster Suite**, you will only be able to view the employees that belong to that group. For example, let's assume that that your entire Sales staff belong to the "Sales" group and your R&D staff belong to a separate group entitled "R&D". If you load a payroll then select the Sales group, from that point onward you will only be viewing Sales employees. Other employee types will not appear in your list nor will they be available for processing.

Similarly, the *Next* and *Previous* employee shortcuts (**<F4>** and **<F3>**) will only display the employees that are included in the group.

Working at the Payroll Level

All group settings are defined at the payroll level. This includes everything from creating and opening groups to more advanced features such as modifying an existing group. This section discusses the creation and modifications of both group types (Fixed and Payroll Condition)

Fixed Groups

Fixed Groups are determined by selecting employee names from a list of employees included in a given payroll. Fixed Groups provide an easy method of selecting employees for payroll processing between pay periods.

TO CREATE A FIXED GROUP:

1. With a payroll selected, choose the *New - Employee List* command from the **Groups** menu. This opens the *New Fixed Group* dialog box that displays a list of employees in the current payroll.

> **Note: Employees List** - Each time you choose the *New - Employees List* command, you are presented with the names of **every** employee in the current payroll. This ensures that you have access to all employees when you need to create a group.

Fig. 1
The New Fixed Group Dialog Box

2. Select the employee(s) you wish to include in the group by clicking once on their name. To remove the selection, click on the name a second time.

3. Once you have selected the employees, click *OK* to close the dialog box. This closes the *New Fixed Group* dialog box and activates the group for the **current payroll session**.

> **Note: The Current or Active Payroll Session** - The term "current payroll session" refers to the time between loading a payroll until you close the payroll. For example, if you load payroll "A" and enable a group, then load payroll "B", the group will be disabled (and you will have to re-enable it if you want to use it again).

A red note appears near the bottom of the *Payroll Module* window indicating that a "Temporary" group has been enabled. The menu bar will also display the term "untitled" indicating that this temporary group has not yet been saved to disk.

You can now use this new group until you close the payroll. If you wish to work with this group once again, you should perform the Save operation
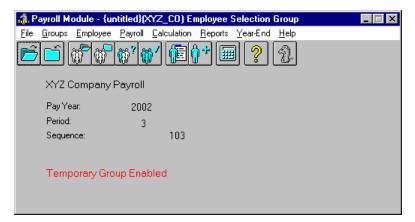
Fig. 2
The Temporary Group Enabled

SUMMARY - TO CREATE A FIXED GROUP:

- From the Payroll module window , select your payroll and choose the **Groups - *New - Employee List*** menu command.

- Choose your employees from the list provided, then close the New Fixed Group dialog box.

- Your group is now enabled for the current payroll session.

Saving Groups

Groups must be saved in order to use them in the future. Although a group may be enabled and in use, it does not necessarily mean it has been saved. For example, if you close a payroll without first saving the group, the group's information will be lost.

Note: Unsaved Group Information - If you close a payroll without saving the group, the group's information is discarded. This means you will have to create it again for later use. If there is a possibility that you may require a group, it is a good practice to save it. If you find that you are collecting many unused groups, you can easily delete them later using the *Delete* command under the **Groups** menu.

Depending on the group type, your new group may be saved automatically or you may have to explicitly perform the Save operation. You can verify whether a group has been saved to disk by:

- Checking to see if the group name appears in the *Payroll* module's title bar. If the word {untitled} appears before the payroll name, then **GrandMaster Suite** is using a group that is **not** yet saved. Closing the payroll will discard this group's information.

- Checking to see if the term "Temporary Group Enabled" appears near the bottom of the *Payroll* module window. If this term appears, then **GrandMaster Suite** is using a group that is **not yet** saved. Once again, closing the payroll will discard this group's information.

Saving Fixed Groups

Fixed Groups are never saved automatically. You need to save them in order to use them in another payroll session.

TO SAVE A FIXED GROUP:

1. With your Temporary group enabled for the current payroll session, choose the *Save As* command from the **Groups** menu. This opens the *Save As* dialog box where you must specify the name of your new payroll group.

Fig. 3
The Groups - Save As Command

2. Enter a unique name for the new group in the *Group* field. If you have saved other groups before, you can use the *List* button to view these existing group names (you can also press the **<F8>** key).

3. Use the *Description* field to enter a brief description that will help you identify this group in the future. For example, if your group name is HEALTH, the description could read "Health Care Employees".
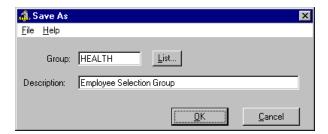

Fig. 4
A Completed Save As Dialog Box

4. Select the *Save* button once your information is complete. This saves the group information. A new red note appears in the *GrandMaster Payroll* window indicating that a "Fixed" group has been enabled. The menu bar also displays the name of the new group.
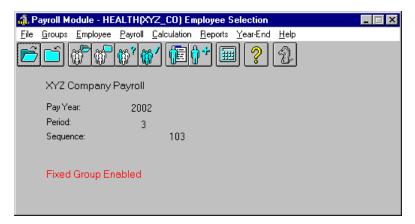
Fig. 5
The Fixed Group Enabled

Payroll Condition Groups

Payroll Condition Groups allow you to specify certain conditions that an employee must meet before they can be included in a given calculation/report. Each time a Payroll Condition Group is loaded, GrandMaster Suite will check an employee to see if they meet the given criteria. If they do not, the employee is not loaded.

Once the group is loaded, the resulting list of employees is static until you close the payroll, load a new group or refresh the group.

TO CREATE A PAYROLL CONDITION GROUP:

1. With a Payroll selected, choose the *New - Payroll Condition* command from the **Groups** menu. This opens the *Payroll Condition Group* dialog box that allows you to define the settings for the new group.

   The required settings are presented under four separate tabs with the first tab containing the *Group Code* and *Description* options.
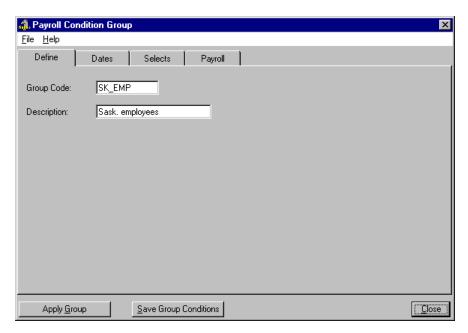
Fig. 6
The Define Tab

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

3.   Click on the *Dates* tab to view the group's date-related settings. These options allow you to constrain an employee based on their Birth date, Employment Date or Termination Date.
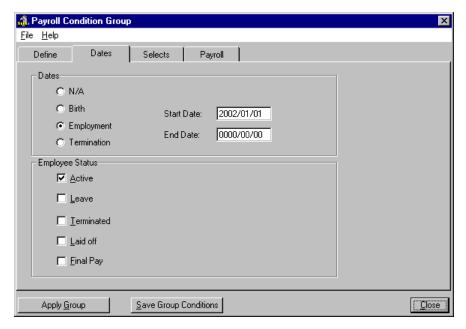

Fig. 7
The Dates Tab

4.   Choose one of the radio buttons under the *Dates* section then enter a valid *Start Date* and *End Date* for the corresponding method. Each time you load this group, GrandMaster Suite will check to see if each employee matches these settings before including them in the processing.

> **Note: Date Ranges** - To easily create a group based on your employee's seniority, select the *Employment* radio button, then define an appropriate date range. The *Start Date* could be when your company began operations -- the *End Date* could be one year later. The resulting group would only include employees who have been employed within that range.

In the previous sample, each employee must have been hired sometime after January of the year 1995. If they were hired before this time, they will not be included in the group.

5. Move to the *Employee Status* section and check one or more of the boxes. If you check more than one box, the employee will need to match both criteria in order to be included in the group.

In the previous example, only *Active* employees hired after the year 2002 will be loaded when this group is enabled.

6. Click on the *Selects* tab to access the next set of data. Certain items are of a general nature such as the Sex and Province. Other items are more detailed and need to be set up in your payroll before you can select them as part of your group criteria. These detailed items include:

- Template

- Distribution

- Default Positions

- Payroll Categories

Refer to the Online Help and other **How To** documents for more details on the preceding four topics.
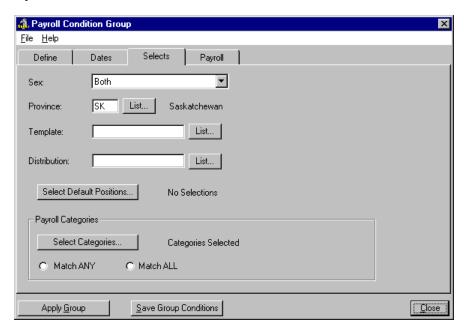

Fig. 8
The Selects Tab

7. Define the criteria for the group by choosing the appropriate options. Certain criteria offer a *List* button so you can choose from multiple options (e.g. Template, Distribution). Other criteria offer a button that opens another dialog box that will display further editing options (e.g. Default Positions, Payroll Categories).

8. Click on the *Payroll* tab to access the next set of data. This tab allows you to create groups that include:

- a specific payroll run.

- employees that have a specific Earning, Deduction, and/or Accumulator.

- employees that earn amounts based on a specified Earning Table.

If you would like to include a specific **Pay Sequence** as one of your group's criteria, you can do this easily using a Pay Sequence condition. This can be useful for including only those employees who have received payments during a set period of time.

9. To begin defining a Pay Period, choose the *Select Pay Sequence* button. This opens the *Pay Sequence Selection* dialog box where you can define a specific pay run for the active payroll.

10. Select the pay sequences you wish to include in the group by clicking once on their row. To remove the selection, click on the row a second time.
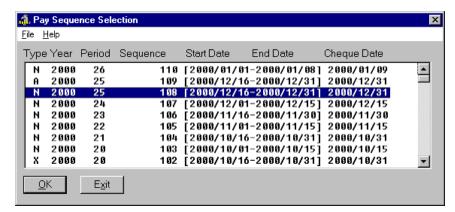

Fig. 9
A Selected Pay Sequence

11. Click *OK* to close the *Pay Sequence Selection* dialog box once you have completed defining this condition. The *Payroll* tab updates to show the selected pay run.

Select Earnings	If you would like to apply a condition based on a specific **Earning** type, you can do so using the *Select Earnings* button. This can be useful for including only those employees who are assigned such an earning in the payroll.

12. To begin defining the group's earning-related criteria, choose the *Select Earnings* button. This opens the *Payroll Earnings Selection* dialog box where you can choose one or more earning types.

Fig. 10
The Payroll Earnings Selection Dialog Box

For example, if you select the *Salary* earning type and choose the *Include* radio button, this will instruct **GrandMaster Suite** to include only the employees who have this earning assigned to them in the payroll (whether or not they have received any pay amounts). If a given employee is assigned to receive *Hourly* earnings instead of a regular salary, they will not be included in the group.

Conversely, if you choose the *Exclude* radio button, this will instruct **GrandMaster Suite** to leave out any employees that have the *Salary* earning type assigned to them.

13. Once you are satisfied with your selection, click OK. This will apply the selected earnings and the text label beside the *Select Earnings* button will update to read "Earnings Selected".
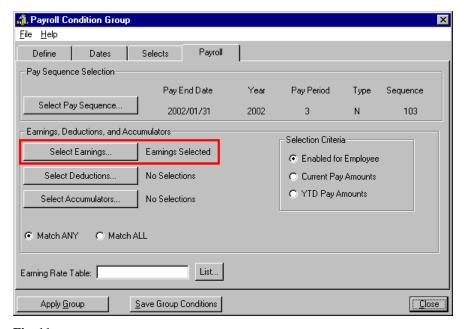

Fig. 11
Selected Earnings are Indicated

Select Deductions	To apply a Deduction-based condition, simply use the same procedure outlined in **Step 13** (choosing the *Select Deductions* button).
Select Accumulators	To apply an Accumulator-based condition, simply use the same procedure outlined in **Step 13** (choosing the *Select Accumulators* button).

14. Once you have completed the settings for this group, ensure that you choose the appropriate radio button under the *Selection Criteria* section.

Enabled for Employee	Choose this option to include employees who have the defined Earnings, Deductions and/or Accumulators assigned to them in the active payroll (whether or not they are receiving an amount for the item). For example, if an employee is assigned an *Hourly* earning but has been on vacation (receiving no earnings for the pay period), they **will** be included in the group.
Current Pay Amounts	Choose this option to include employees who have the defined Earnings, Deductions and/or Accumulators assigned to them in the active payroll and who have had a transaction occur concerning this earning deduction or accumulator. For example, if an employee is assigned an *Hourly* earning but has been on vacation (thus receiving no earnings for the pay period), they **will not** be included in the group.
YTD Pay Amounts	Choose this option to include employees who have the defined Earnings, Deductions and/or Accumulators assigned to them in the active payroll and have YTD amounts in the Earnings, Deductions and/or Accumulators in the current year.
	For example, if an employee is assigned an *Hourly* earning and has only received earnings for one week in the entire year, they **will** be included in the group.

15. Once you have completed the settings in this tab, ensure that you choose the appropriate radio button under the *Category List Criteria*.

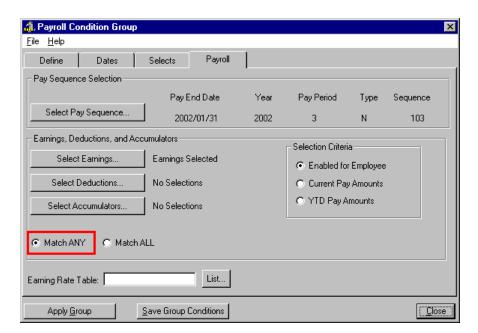|	
Match ANY	Choose this option to include an employee whose data matches at least one of the defined items. This will generally result in larger employee lists since your conditions are less restrictive (i.e. only one of the items has to match in order for an employee to be included).
Match ALL	Choose this option to include an employee whose data matches every one of the defined items. This generally results in smaller employee lists since your employees much match **all** of the given conditions in order to be included.

Fig. 12
These Settings Will Include All Employees Who Match at Least One Item

If you have **Earning Tables** set up as part of your payroll you can specify to have employees with this specific earning table as part of your group list.

16. Enter a valid code in the *Earning Rate Table* field. To view a list of existing Earning Rate Tables, select the *List* button list or press the **<F8>** key. This will open the *Global Earning Tables* dialog box.

17. Select the earning tables you wish to include in the group by clicking once on their row. To remove the selection, click on the row a second time.
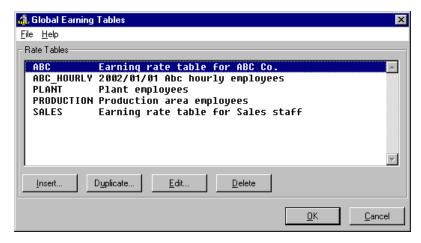

Fig. 13
A List of Earning Rate Tables

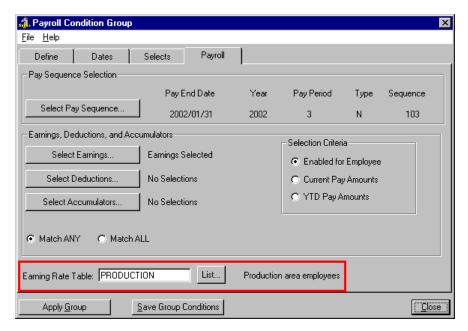**18.** Click *OK* to close the *Global Earning Tables* dialog box once you have completed defining this condition.

Fig. 14
An Earning Rate Table Assigned to the Group

SUMMARY - TO CREATE A PAYROLL CONDITIONS GROUP:
• From the Payroll module window, select your payroll and choose the Groups - New - Payroll Condition menu command.
• Use the four tabs in the *Payroll Conditions Group Setup* dialog box to specify the payroll criteria (conditions) that your employees must meet in order to qualify for the group.
• Enable the group for the current session via the *Apply Group* button or save the group for later use via the *Save Group Conditions* button.

Saving Conditional Groups

There are two methods of saving Conditional Groups. You can save the group immediately after creating the conditions or later, after the group has been enabled. However, there is a subtle difference that results depending on the method you choose:

- If you save your group from the *Payroll Condition Group Setup* window (by choosing the *Save Group Conditions* button or via the **File - *Save Group Conditions*** command), the group is saved.

- If you choose the **Groups - *Save As*** command, a message will appear stating that your Conditional Group will be saved as a "Fixed" group type. This means that the next time you select the group from your list of groups, this group will only contain the employees listed in the original group and will not create the group from the parameters set up in the conditions group list.

Fig. 15
The "Fixed" Conversion Message

> **Note: Saving Payroll Condition Groups** - When you save a Payroll Condition Group, only the data conditions for the list are stored -- no employee names are stored with the group. This ensures that your groups accurately reflect the desired criteria and not simply based on a listing of employee names.

TO ENABLE A PAYROLL CONDITION GROUP:

Once you have completed the desired settings using any or all of the four tabs of this window, and have saved your group, you are ready to enable the group for the **current payroll session**.

1.   Choose the *Apply Group* button from the bottom of the *Payroll Condition Group Setup* window. This enables your Payroll Condition Group for the current payroll session and applies each of the settings you defined for the group. As mentioned earlier, the "current payroll session" refers to the time between loading a payroll until you close the payroll.

Once the group has been applied, a message appears showing the number of employees that are included in the group, based on all of the defined conditions. This is a good way of verifying that you have entered your conditions correctly. If the number of employees does not seem right, simply go back through the four tabs and verify your conditions.

Fig. 16
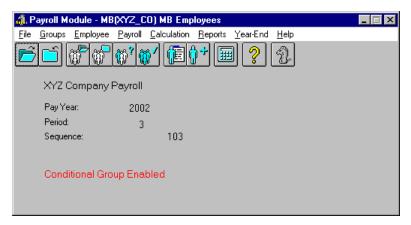*A Message Showing 12 Employees in the Group*

Fig. 17
A Conditional Group Enabled

> **Note: Saving Payroll Condition Groups** - When you save a Payroll Condition Group, only the data conditions for the list are stored -- no employee names are stored with the group. This ensures that your groups accurately reflect the desired criteria and not simply based on a listing of employee names.

Opening a Group

Once a group has been saved, it can be opened for use at any time. Once you open the group, its name will appear in the title bar of the *Payroll* module window. Additionally, the bottom of the *Payroll* module window will display a line of red text indicating whether the group is **Fixed** or **Conditional**.

TO OPEN A GROUP:

1.   With the *Payroll* module open, choose the ***Groups - Open*** command.
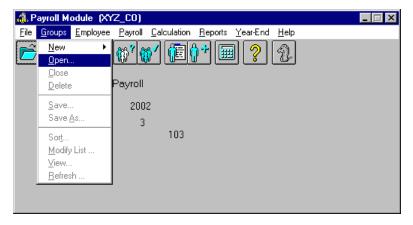

Fig. 18
The Open Group Command

This displays the *Open Group* dialog box that displays each of the groups that exist

2.   Select the group you wish to use by clicking once on its name, then click *OK* to complete the process.
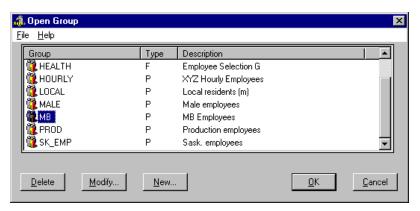

Fig. 19
A Selected Group

The group is now loaded and ready for use. You can verify that the group has loaded the correct employees by selecting the **Group -** *View Group* command. This displays a list of the employees to which this group applies.

Closing a Group

Once you have finished working with a specific group of employees, you should close the group. This will once again provide you access to all of the employees in your payroll.

For example, let's say you create a group of only 3 employees, run a payroll report, then you leave the group enabled. Afterwards, if you wanted to create another report that included all of the employees, you would still see the same 3 employees in your lists (because the group is still enabled).

TO CLOSE A GROUP:

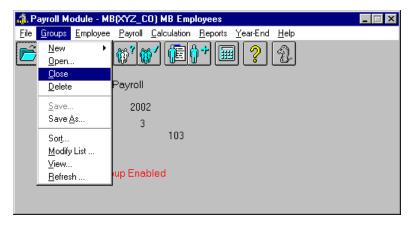   **1.**   With the *Payroll* module open, choose the ***Groups - Close*** command.

Fig. 20
The Close Group Command

This disables the group and reloads all of the employees in the current payroll. The *Payroll* module's title bar no longer displays the group name. The Fixed or Conditional term is also removed from the bottom of the *Payroll Module* window.

> **Note: Closing Groups Automatically -** Groups are closed automatically when you close a payroll. As such, remember to save your groups to avoid losing their information once you complete your payroll session.

Deleting a Group

If you have created many groups and no longer require them, you can clean up your list of groups by deleting them. You can delete a group whether or not it is enabled -- please review the following two sections to see how to perform both actions.

TO DELETE A GROUP THAT IS ENABLED:

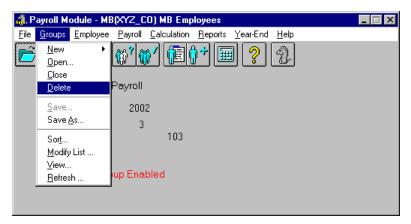   **1.**   With the *Payroll* module open, choose the ***Groups - Delete*** command.

Fig. 21
The Delete Group Command

This displays a message prompting you to confirm the permanent removal of the group's information. Click *Yes* to confirm the removal or *No* to retain the group.
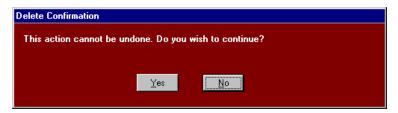

Fig. 22
The Confirmation Message

TO DELETE A GROUP THAT IS NOT ENABLED:

1. With the *Payroll* module open, choose the **Groups - Open** command. This displays the *Open Group* dialog box that displays each of the available groups.

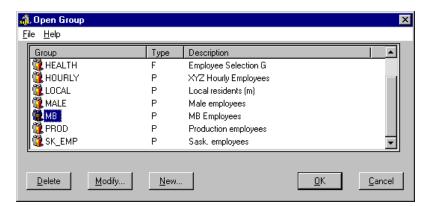2. Select the group you wish to delete by clicking once on the group name, then click *OK* to complete the process.

Fig. 23
A Group Selected for Removal

This displays a message prompting you to confirm the permanent removal of the group's information. Click *Yes* to confirm the removal or *No* to retain the group.

Modifying a Group

If you need to change the employees in a particular group, you may do so at any time. The procedure varies slightly depending on whether the group is Fixed or Conditional.

TO MODIFY A FIXED LIST GROUP:

1. With the Fixed group loaded, choose the ***Groups - Modify List*** command. This opens the *Employee Selection Group Modification* dialog box.
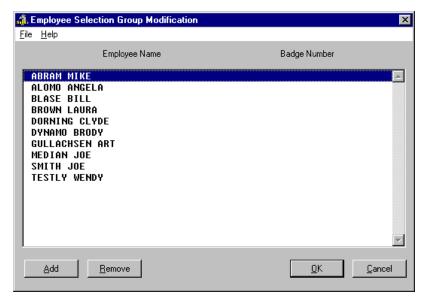

Fig. 24
The Employee Selection Group Modification Dialog Box

2. To add an employee to the group, choose the *Add* button, select the employee(s) from the dialog box that appears then click *OK*. The added employee(s) will appear at the bottom of the list.

3. To remove an employee from the group, select their name from the list, then choose the *Remove* button. The employee's name will be removed from the list.

TO MODIFY A PAYROLL CONDITION GROUP:

1. With the Conditional group loaded, choose the ***Groups - Open*** command. This displays the *Open Group* dialog box that displays the available groups.

2. Select the *Modify* button. This opens the *Payroll Condition Group* dialog box.

3. Modify the group's criteria as required using the four tabs in this dialog box, then choose the *Save Group Conditions* button. This saves the group's updated information.

4. Close the two dialog boxes to return to the *Payroll Module* window. The information is updated and the group is automatically reloaded with the new settings.

Viewing a Group

If you ever need to verify that a group is loaded correctly, you can do so by viewing the list of employees. The procedure is the same for Fixed or Conditional groups.

TO VIEW A GROUP:

1. With the group loaded, choose the *Groups - View* command. This opens the *View Group* dialog box and displays all of the employees in the group that is currently loaded.
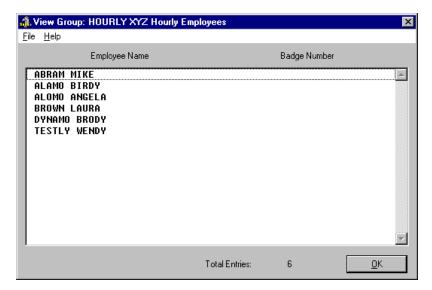

Fig. 25
The View Group Dialog Box

Working at the Employee Level

There are no group settings that need to be defined from the Employee level. That is, all group settings are made from the Payroll level (see the previous section).

When is the Best Time to Set Up This Feature?

Generally speaking, you should set up groups once your employees have been entered in your payroll. For example, if you try to create a Fixed Group but have not yet entered any employees, there will be no employees to choose from.

Similarly, if you attempt to create a Conditional Group without first entering your employees, the group will be discarded (because there are no employees to include).

Frequently Asked Questions

I can only see certain Employees in my lists.

If you are in the *Employee Menu* and have access to only a subset of the available employees, you probably have a group enabled. To gain access to all available employees, you must exit the *Employee Menu*, then close the group (via the *Groups - Close* command in the *Payroll* module window). When you re-enter the *Employee Menu*, all of your employees will be available.

My group does not include all the employees that it should.

If you have a **Fixed Group** that does not have all the employees you want, simply choose the Groups - Modify List command, then add the required employees. Remember to save the updated group if you need to use it again.

If you have a **Conditional Group** that does not have all the employees you want, simply choose the *Groups - Open* command, then select your Conditional Group from the list and choose the **File - Modify** command. Change the conditions as required to ensure that the requisite employees are included, then save your changes. You can verify that your employee list has changed by opening the *Employee Menu* and pressing **<F8>** to review your updated employee list. Remember to save the updated group if you need to use it again.