
GRANDMASTER SUITE

User's Guide to Human Resource

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INTRODUCTION

Welcome to Can-Pay's GrandMaster Suite **Human Resources Module**. The Human Resources Module is a user-friendly system. The Human Resources Module is a Windows/OS2 program, and uses the standard Windows features which make it simple to learn and use.

The system is flexible with user defined options. These options allow users to set up their own database with variable information about each category of information within the database. The data input screen and report layouts are also fully user defined.

The user would choose a category of information which they require such as education. They would then determine what information they would like to keep regarding education, such as the year of graduation, courses taken, place of instruction etc. This would all be defined by the user, using simple point and click menus.

Human Resources Module

The Human Resources Module provides the facilities to record and administer employee and position information.

The Human Resources Module shares the ability with the Schedule Module to record leave time for employees. The leave time recorded through the Human Resources Module is available to the Schedule and Payroll Modules for processing.

The standard data fields requested by the Human Resources Module may be extended by user defined data fields attached to the system data categories.

Employee Data

Standard Data

The Standard Employee Data recording functions are:

- Name and address data.
- Leave Time - inclusive vacation, sick time, training, time off in lieu, and other time off.
- Incidents - includes accidents, union grievances, labour board disputes, and other incidents.
- Availability - time available for work.
- Skills - records skills and certifications.
- Equipment Assignments - includes tool kits, safety equipment, and other company owned equipment.
- Automotive - includes parking spaces, and company vehicle assignments
- Company Plans - includes profit sharing, share purchase, and saving bond plans.
- Position Assignments - employee job assignments.
- Evaluations - employee performance evaluations.

User Defined Employee Data

The Human Resources Module provides the facilities to define any number of additional data categories for employees. Each data category may contain up to 100 data fields.

Each defined data category has an individual update screen.

Additional screens may be defined that incorporate data from several data categories including system defined data categories.

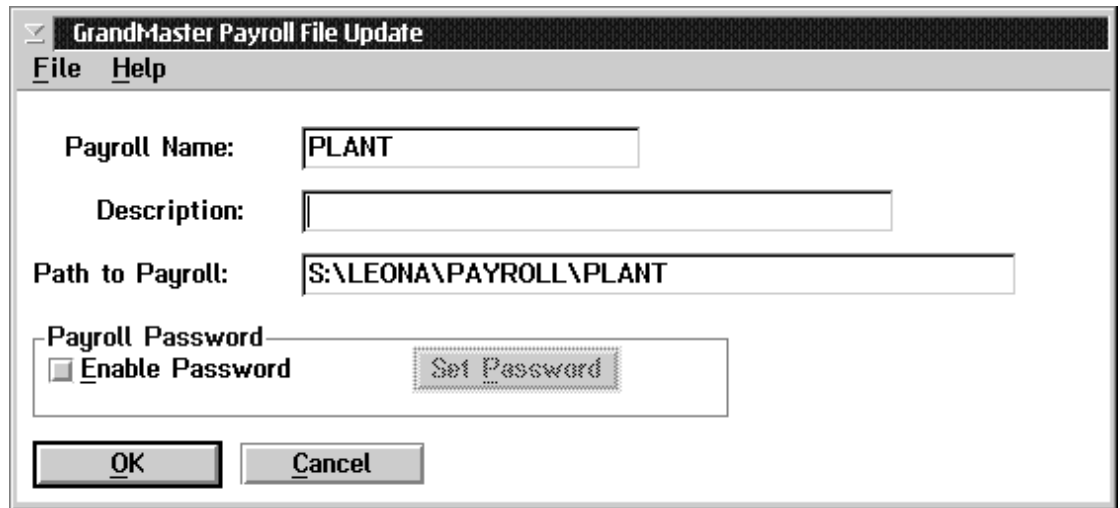
Inserting a New Payroll

The **Insert** option from the select payroll program will allow you to create a new payroll. The following dialog box appears:



Type in the name of the new payroll and select the OK button.

The GrandMaster payroll file update dialog box will appear as follows:



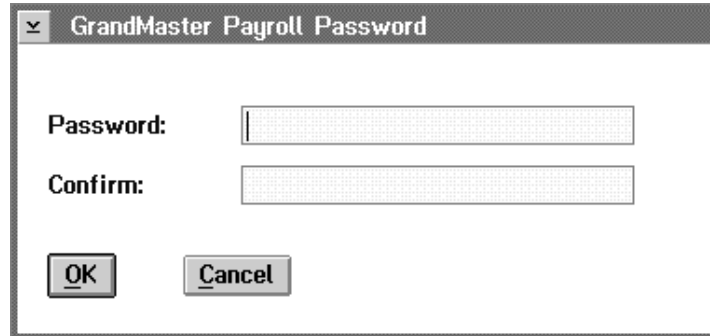
Type in the payroll name, description, and path to the payroll and select OK from the file menu.



Click on the box to the left of the enable password if you wish to password protect the payroll.

Passwords

If you have selected ENABLE password the following dialog will appear:



The image shows a dialog box titled "GrandMaster Payroll Password". It contains two text input fields. The first field is labeled "Password:" and the second is labeled "Confirm:". Below the input fields are two buttons: "OK" and "Cancel".

Enter your desired password and then retype the password again in the confirm field.



The password will be shown as *'s on the screen as you are typing for security reasons. Please refer to the Administration manual for additional information concerning passwords, security and entitlements.

Set Search Technique

Once you have chosen the payroll that you wish to work with you may prefer to set an alternate search technique for accessing employees within the selected payroll. The system default search technique is alphabetic surname search.

If the **Set Search Technique** option is selected from the File menu, then the following screen will appear:



Employees on the system may be accessed through three different techniques:

- **Employee Name** - The employee name or a portion of the employee name may be entered. The system will provide a list of the names that match the portion entered. The name matching process requires that the last name be entered first, given name last. When a name is entered the name must be preceded by the “%” character, or the system option for employee search must be set for employee name search.
- **Badge Number** - The employee badge number may be used to locate an employee. The badge number is a left justified 10 character alphanumeric field. When a badge number is entered the number must be preceded by the “@” character or the system option for employee search must be set for badge number search.
- **Employee Number** - The employee number may be used to locate an employee. The employee number search may only be used when a payroll has been selected. When an employee number is entered the number must be preceded by the “#” character or the system option set for employee search must be set for employee number search.



When employee group is in effect the search for an employee is restricted to the selection group.

Each user may save their preference for a search technique.



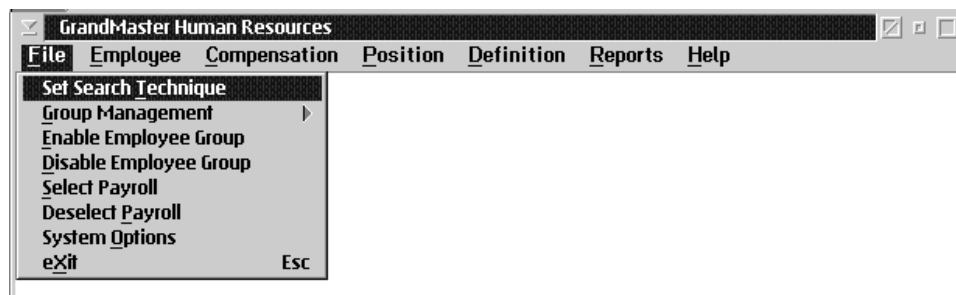
When the preferred search is employee number the system will require the selection of a payroll to search for employees.

When a function offers a **next employee** or **prior employee** option the order of presentation for the employees will depend on the search technique in effect.

MANAGING EMPLOYEE GROUPS

The Main Human Resource menu provides facilities that operate on a group of employees. The group may be all employees known to the system, all employees in a particular payroll, or an employee selection group.

All operations regarding the management of employee groups are available in the Group Management menu from the main menu bar. The **Group Management** menu appears as follows:



MANAGING EMPLOYEE GROUPS

The options available to the user are:

- define and maintain employee selection groups
- enable/disable an employee group for scheduling use

Selection Groups

A selection group is a list of employees that may be used to control processing in the Payroll, Human Resources, Scheduling, and Time Keeping modules.

A selection group is created through the **Group Management** option.

A selection group may be a **dynamic** or a **fixed** group.

Dynamic Groups

A dynamic group is defined by a set of conditions that determine the employees that are members of the group.

Each time the group is loaded the load process scans the employee data to determine the eligibility. Once loaded the group of employees is static until the group is refreshed or loaded again.

When a dynamic group is saved only the data conditions for the list are stored.

One dynamic group definition utility is provided:

- **Payroll Data Conditions** - The Payroll Data Condition is used to define a selection group within a particular payroll. The definition uses a fixed set of payroll data fields to determine membership in the group.

Fixed Groups

A fixed group is defined as a list of specific employees.

When the group is loaded the list is loaded from the storage area.

Fixed group definitions are determined by selecting employees from a list of eligible employees. The list of employees may be from an existing group selection, all employees, or employees in a particular payroll.

Defining Employee Selection Groups

Employee Selection Groups may be defined in two ways:

1. Picking employees from a list of all employees known to a single payroll on the system.
2. Selection of employees from a single payroll by setting conditions that payroll data items for the employees must match.

The first type of selection group is a **fixed** list, thus a list must be maintained by the user. A maximum of 1000 employees may be present in a fixed list. The last type of selection group is a **dynamic** list, therefore each time the list is loaded the employee data is compared to the conditions that define the selection. A **dynamic** list may contain any number of employees.

The system provides for saving and loading any number of the selection group types. Only one selection group may be active at a time.

Selection Group Restrictions

A user ID may be restricted to the use of a single selection group. The restriction and name of the selection group are set through the **System Administration** functions.

The selection group restriction feature allows the **System Administrator** to control any user's access to employees or to an arbitrary sub-set of employees on the system.

When a user ID is restricted to a particular selection group only the employees in that selection group are visible to the user. When restricted, the user ID does not have access to the functions that allow maintenance of the selection group definitions.

The user may remove employees from the selection group but this modification is discarded the next time the user refreshes the selection group or logs off the system.

Selection Group Processing

System functions that process more than one employee at a time will use the current selection group (loaded and enabled) to determine the employee to process.

When a screen offers a **next employee** option, the next employee is always provided in the order of the current selection group. The sort order of the current selection group may be changed through the **sort selection** option.

When a report is generated by the report writer or any other reporting function the employees included in the report are restricted to the current selection group (loaded and enabled). This feature allows for easy production of sub-set reports.

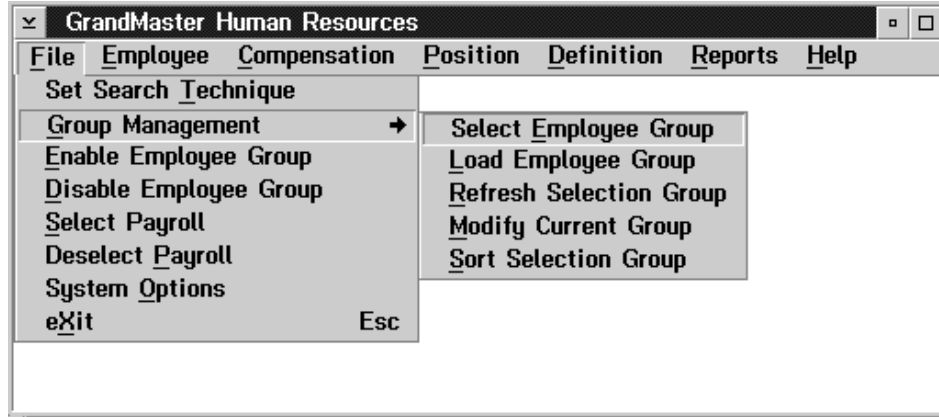
Data Conditions for Selection Groups

A dynamic selection group definition is composed of three parts:

- **Include Conditions** - these conditions describe the data values that the employee must have to be considered in the selection group.
- **Exclusive Conditions** - these conditions describe the data values that will result in the employee being dropped from the selection group if the included conditions are satisfied.
- **Sort Order** - these data fields are used to provide the initial sort order of the selection group.

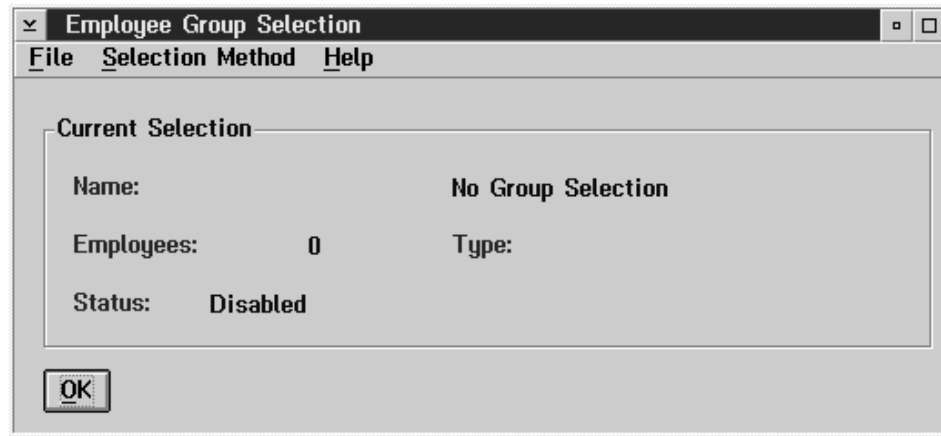
Employee Group Management

When the **Group Management** option is selected the following submenu will appear:

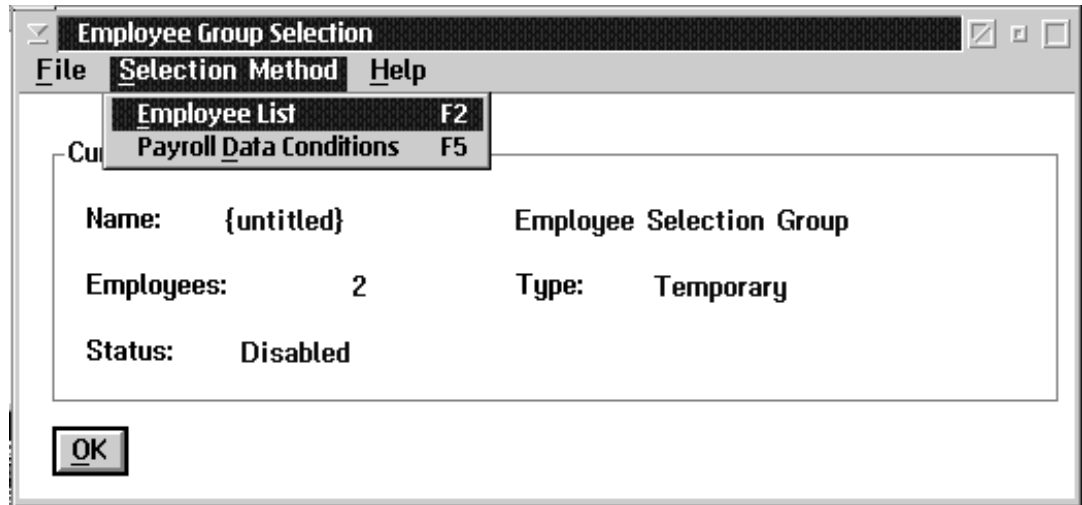


Selecting an Employee Group

This menu option will start up the Employee Group Selection Screen. This screen provides the user with the facilities to define and maintain Employee Groups. The following dialog box will appear.



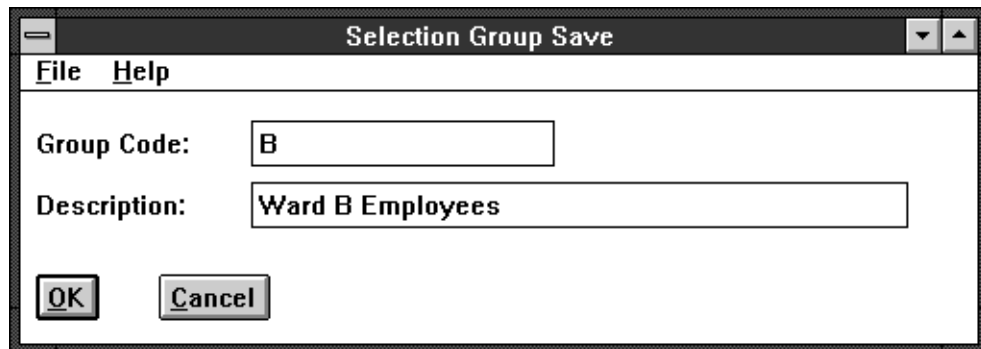
Once the Employee Group Selection dialog box appears choose the method of selection by clicking on the Selection Method option in the menu bar the following box will appear.



After this has been done an employee selection list will appear. The employees that are contained in the list will depend on the method of selection chosen (see section on selection lists below).

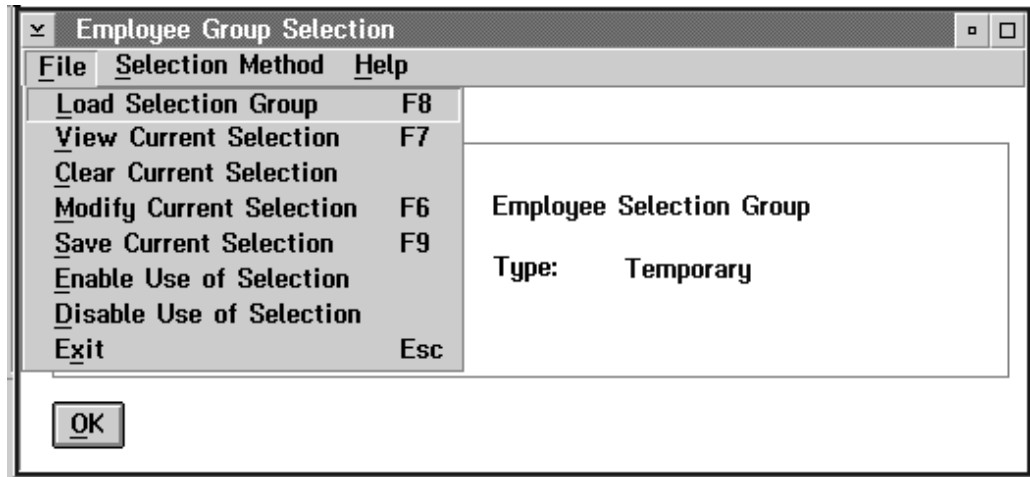
Select all the employees to be in the new selection group and press the OK button.

Next, select the **Save Current Selection** option from the File menu. The following dialog box will appear:

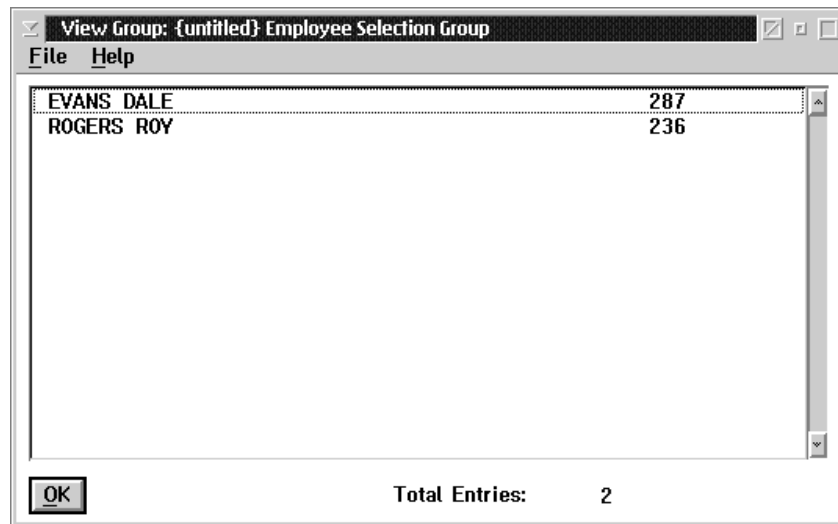


Both the group code and the description must be entered into the fields to save the group . Then select the OK button.

When you are defining and maintaining Employee Group the following pull down menu is available from the File option in the menu bar to view, clear, modify, and save employee group. The following dialog box will appear:



View - to view the employee in the current group select the view current selection from the File menu. The following box dialog box will appear:



Clear - to clear the current group select CLEAR CURRENT SELECTION from the File menu. The employee group selection screen will now show no current groups.

Modify - to add or delete an employee from you current group select MODIFY CURRENT SELECTION from the File menu.

Employee Selection List

The employee selection list screen is presented when the selection of an employee is required. The employees that appear in the list are subject to a number of conditions.

- Current Selection Group in Effect - When a selection group is loaded and enabled only those employees in the selection group may appear in the list.
- Current Payroll Selected - When a payroll is selected only those employees that are assigned to that payroll may appear in the list.



When both a selection group is present and a payroll is selected only the employees that are present in both the selection group and the payroll may appear in the list.

The order of the employees in the list is dependent on the search technique in effect for the user.

- Search by name will present the employees in alphabetic sequence by surname and given name.
- Search by employee number will present the employees in employee number sequence.
- Search by badge will present the employees in badge number sequence



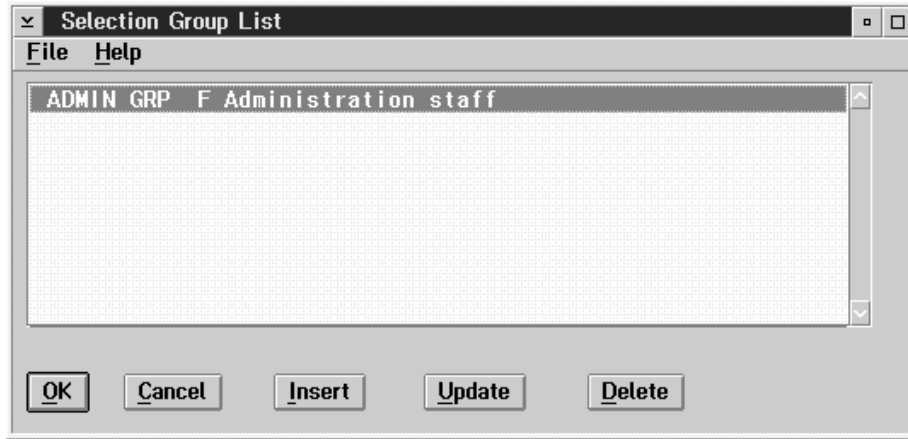
The employees without a badge number will not appear in the list when the search by badge technique is in effect.

The employees in the list are restricted by the value entered to search for an employee.

- Name Search will restrict the list to those employees whose last name corresponds to the last name portion entered for the search.
- Employee Number will restrict the list to those employees whose employee number is equal to or greater than the employee number entered for the search.
- Badge Number will restrict the list to those employees whose badge number corresponds to the badge number portion entered for the search.

Loading an Employee Group

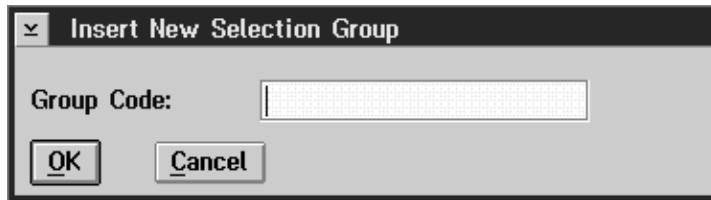
The **Load Employee Group** menu option will display a list of the Employee Groups available to the user. One of these groups may be selected for further operations. The list will appear as follows:



By double clicking on the name of a group the user can load the group.

Inserting a new group

If the INSERT button is selected a new dialog box will appear that allows the user to define a new employee selection group. The dialog box appears as follows:



Removing a group

Selecting the DELETE button will remove the highlighted employee group from the list.

Refresh Selection Group

The **Refresh Selection Group** option reloads the last selection group loaded. This option is used when the selection group has been modified and the user wants to reload the group to eliminate any modifications.

To refresh a selection group the user simply selects the **Refresh Selection Group** option in the Group Management sub menu under the File menu.

Modifying the Current Group

An existing employee selection group may be temporarily modified by adding or deleting employees in the group.

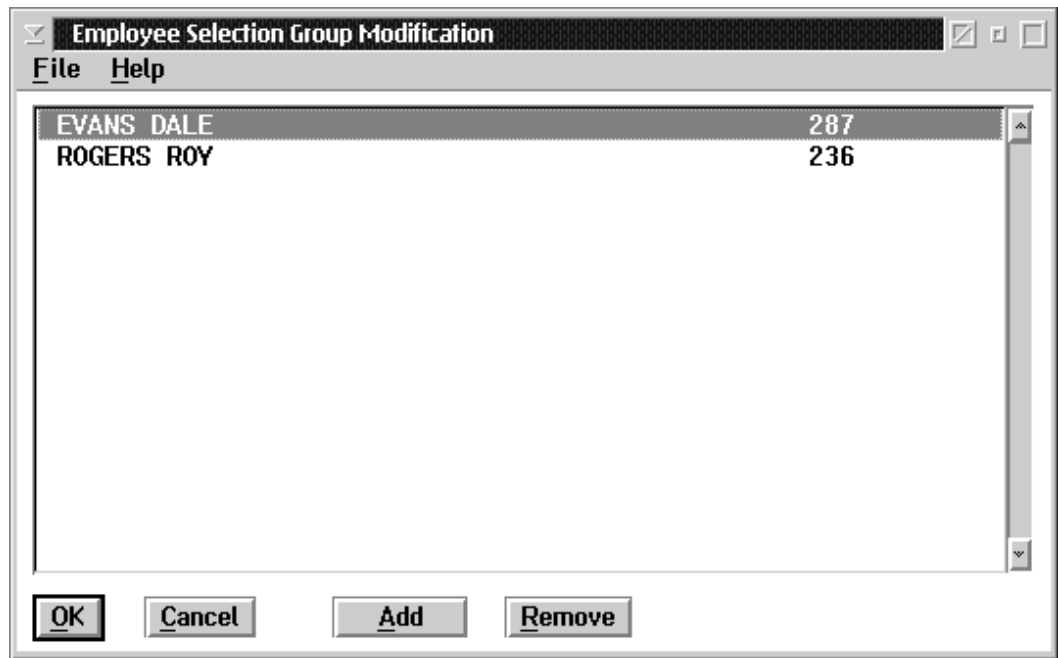
When the initial group is a dynamic group the modifications will be retained until the group is loaded again or refreshed.

The **Modify Current Group** option will bring up the Employee Selection Group Modification dialog box. This option can be found on two different menus but the results are the same.

The option is available in the File menu under the Group Management sub menu.

It is also available if the user selects the **Select Employee Group** option under the Group Management sub menu, and in the Employee Group Selection dialog box the user pulls down the File menu.

The screen will appear as follows when either option is selected.



The dialog box contains a list of the employees in the currently selected employee group.

To delete an employee, select that employee by clicking on it once with the mouse then select the REMOVE button.

To insert an employee into the list select the ADD button, a new dialog box will appear that asks for the name of the employee. Type in the last name of the employee and select OK.

If the user does not know the last name of the employee to be added then the user can:

- select the NEXT button to go to the following employee in the employee group list, or
- select the PREVIOUS button to go to the previous employee on the employee selection list, or
- select the **List** option from the File menu which will create a list of all the employees in the current employee group, from which the user can select an employee.

Enabling an Employee Group

The **Enable Employee Group** option will turn on the current employee selection group for processing. If the group is not enabled the system will not use the group for processing.

When the selection group is enabled the system will limit access to the employees in the selection group. This limit applies to both update functions and report functions.

The **Enable Employee Group** option is available in two different menus and this can be done either way. The user only needs to select the option to enable the current selection group.

This option is available in the File menu under the Group Management sub menu.

It is also available if the user selects the **Select Employee Group** option under the Group Management sub menu, and in the Employee Group Selection dialog box the user pulls down the File menu.

Disabling an Employee Group

The **Disable Employee Group** option in the File menu will turn off the current employee selection group. User ID's that are forced to use a selection group cannot access this menu choice.

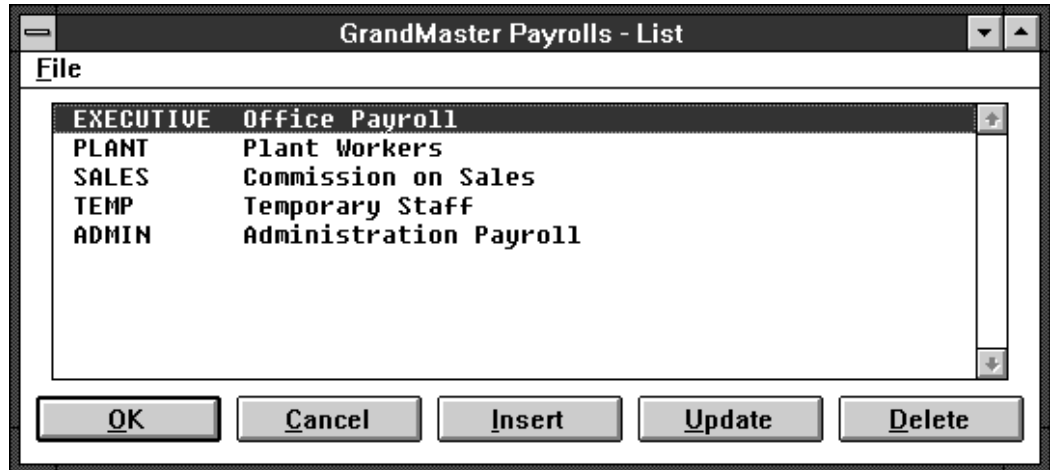
The **Disable Employee Group** option is available in two different menus and this can be done either way. The user only needs to select the option to disable the current selection group.

The option is available in the File menu under the Group Management sub menu.

It is also available if the user selects the **Select Employee Group** option under the Group Management sub menu, and in the Employee Group Selection dialog box the user pulls down the File menu.

Selecting/De-selecting a Payroll

The **Select Payroll** option from the File menu is used to select the payroll for processing. Selecting this will result in a dialog box which displays a list of all the available payrolls:



MANAGING EMPLOYEE
GROUPS

One of these payrolls must be selected for scheduling. The payroll is selected by placing the cursor over the payroll and clicking the left-hand mouse button. The payroll selected will appear in the main menu screen.

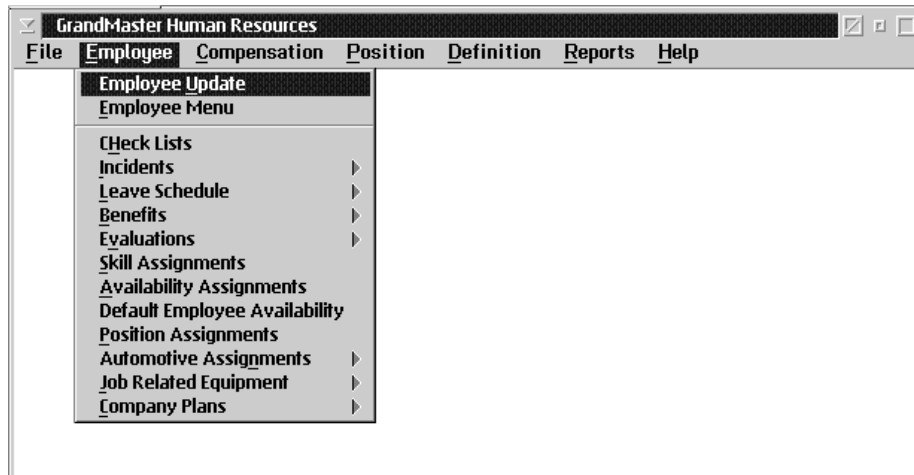
The **De-select Payroll** option from the File menu is used to de-select the currently selected payroll. Selecting this will result in no payrolls being selected.

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EMPLOYEE INFORMATION

The **Employee** menu from the main menu bar provides facilities that operate on a single employee in the GrandMaster Suite Human Resources system.

The **Employee** menu appears as follows:



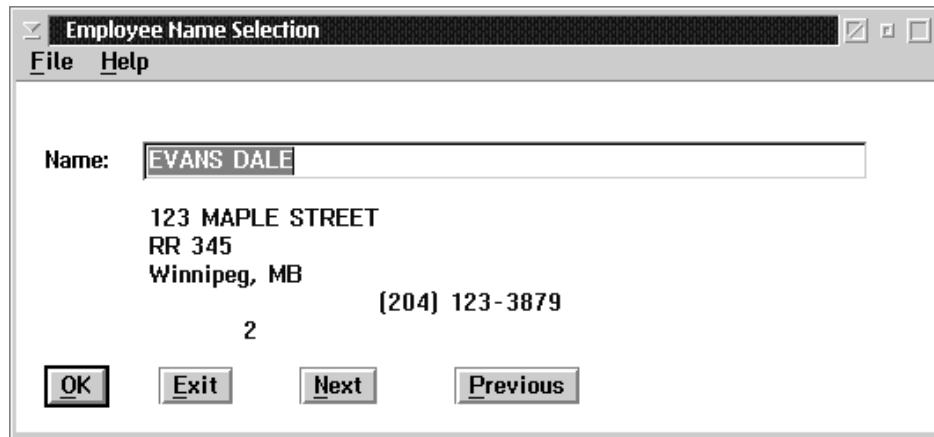
These facilities include all employee data entry functions that are available on the main menu of Human Resources.

EMPLOYEE
INFORMATION

Employee Update

The **Employee Update** option is used to insert and update an employees' master data such as address, ID, medical, personal information and category.

When the **Employee Update** option is selected a dialog box appears as follows prompting the user to select an employee:



To select an employee, type in your choice of the last name, employee number, or the badge number in the name data field. The data entered must correspond to the type of search technique that has been set.



The employee number can only be used if a payroll has been selected.

Next Employee

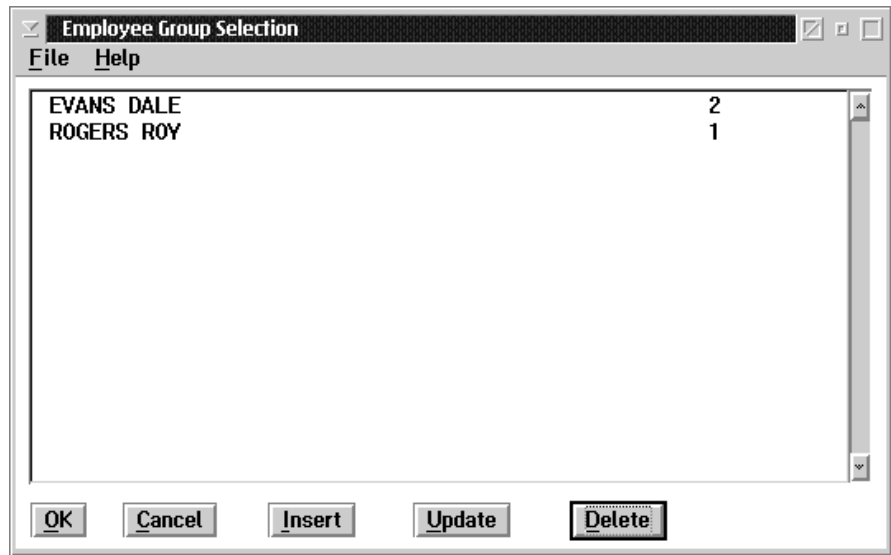
The NEXT EMPLOYEE button, or the **Next Employee** option from the File menu will bring up the next employee in the list.

Previous Employee

The PREVIOUS EMPLOYEE button, or the **Previous Employee** option from the File menu will go back to the previous employee in the list.

F8 (list)

The F8 key, or the **List** option in the File menu will bring up a list of employees. The screen will appear similar to the following:



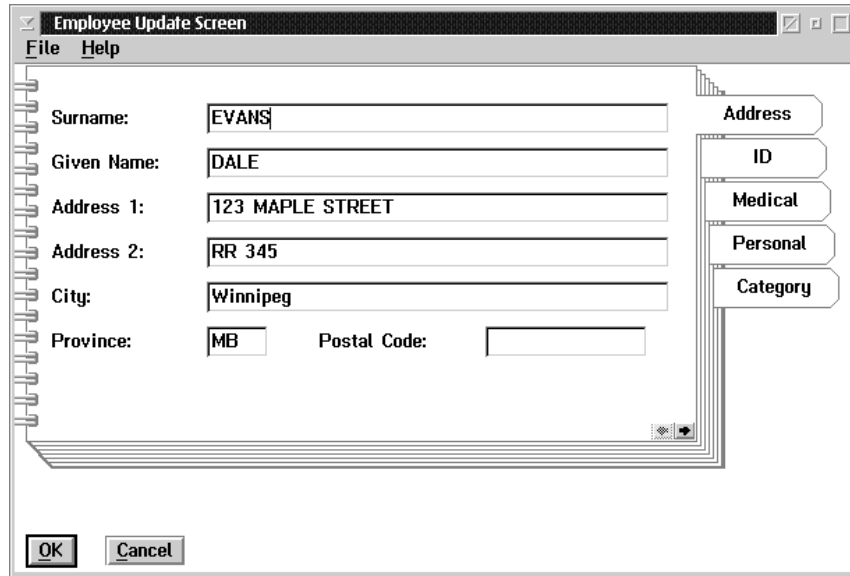
- ☞ To have the list start somewhere other than the beginning simply type in the letter(s) corresponding to where you would like the list to begin before selecting the F8 key.
- ☞ This list will vary depending on whether or not a payroll has been selected. If no payroll is selected all employees will appear in the list. However if a payroll is selected only the employees in that payroll will appear in the list.
- ☞ The search technique and whether or not an employee group has been selected will affect the order that the employees appear in the list .

From the list dialog box the user can insert new employees and update or delete existing employees.

Search Technique The search technique gives the user several ways of searching through the employee list. The types of searches available are name, employee, number, and badge number.

OK

The OK button will select the employee entered into the name data field and move to the Employee Update screen where the employee information can be updated. The screen will appear as follows:



See page 30 - 36 for further information about this screen.

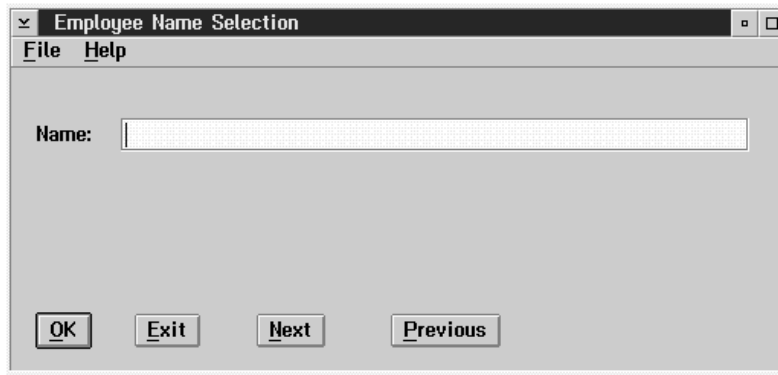
Esc (exit)

The ESC key, the CANCEL button, or the **Exit** option in the File menu will exit the user from the current screen.

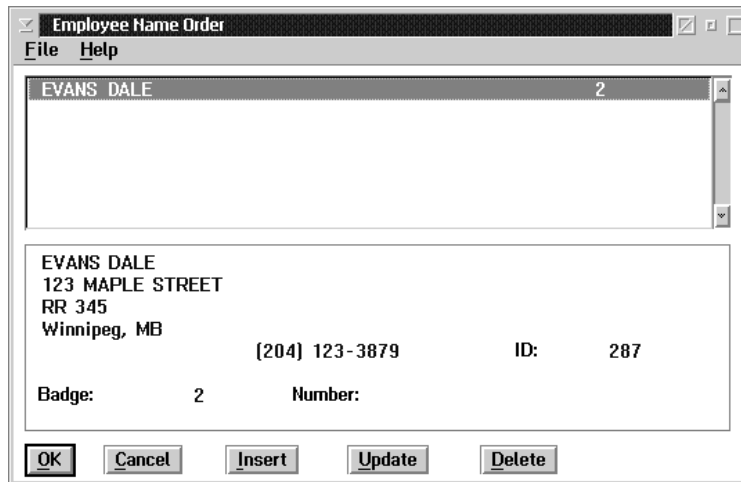
Inserting an Employee

To insert a new employee do the following:

1. Select the **Employee Update** option from the Employee menu. The Employee Name Selection dialog box will appear:

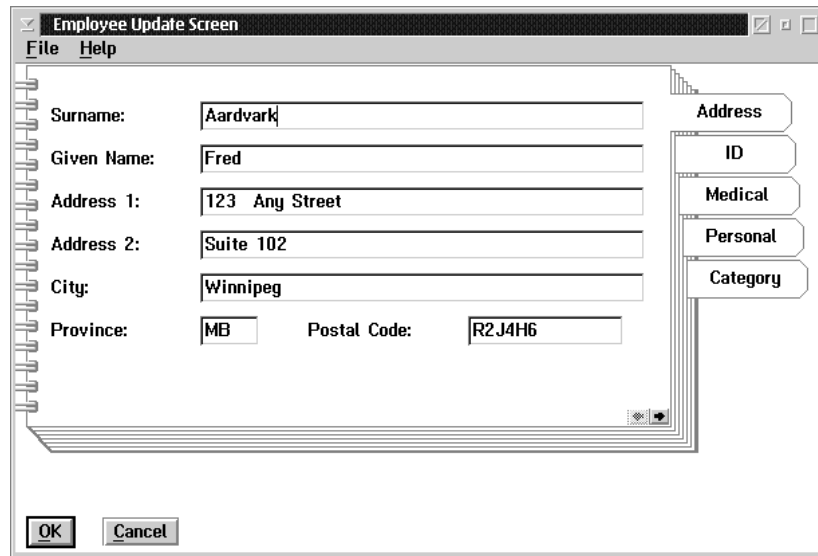


2. Select the F8 key or the **List** option in the File menu. The Employee Name Order dialog box will appear:



3. Select the INSERT button. A dialog box will appear which contains four tabs: address, ID, medical, and personal (these screens are defined below).
4. Enter in the required information and select the OK button.

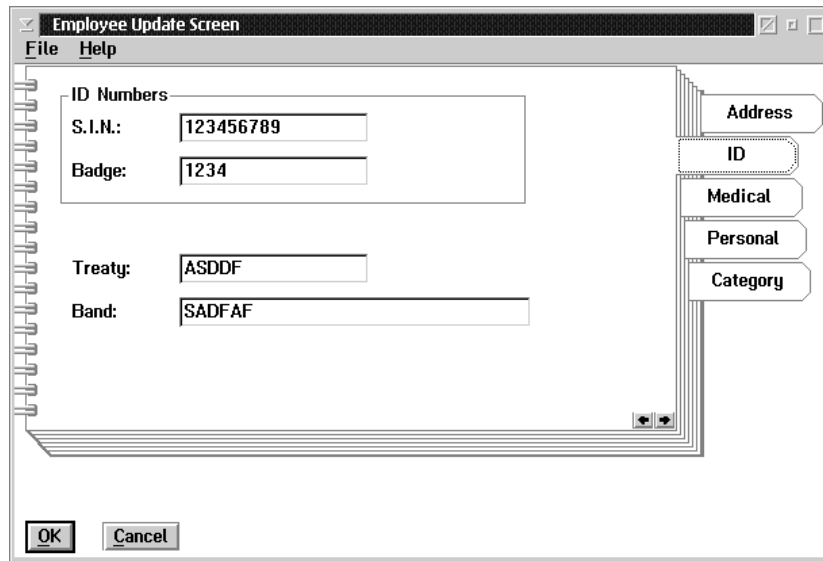
The Address page of the notebook appears as follows:



The following table contains a description of the fields in the screen:

| Field | Description |
|--------------------|--|
| Surname | This field contains the surname of the employee. |
| Given Name | The given name of the employee is entered into this field. |
| Address 1 | The Address 1 field is used to enter in the address of the employee. |
| Address 2 | Address 2 is used as an extra address if the space is needed. |
| City | This field contains the city in which the employee lives. |
| Province | The province of the employee should be entered into this field. |
| Postal Code | This field is for entering the employee's postal code. |

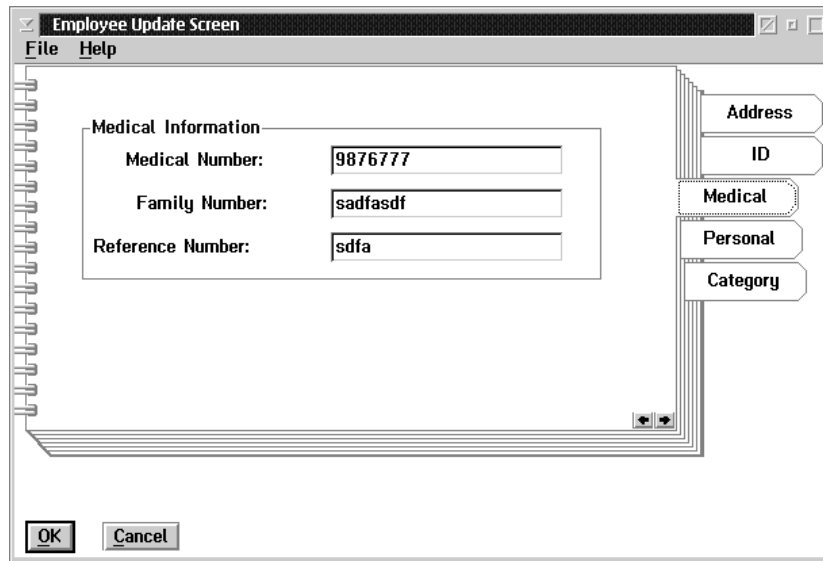
The ID page of the notebook appears as follows:



The following table contains a description of the fields in the screen:

| Field | Description |
|----------------------|--|
| S.I.N. | The employee's social insurance number is entered into this field. |
| Badge Number | The badge number of the employee is contained in this field. Using a badge number is optional. |
| Treaty Number | If the employee has a treaty number it may be entered in this field. |
| Band Name | If the employee has a band name it may be entered in this field. |

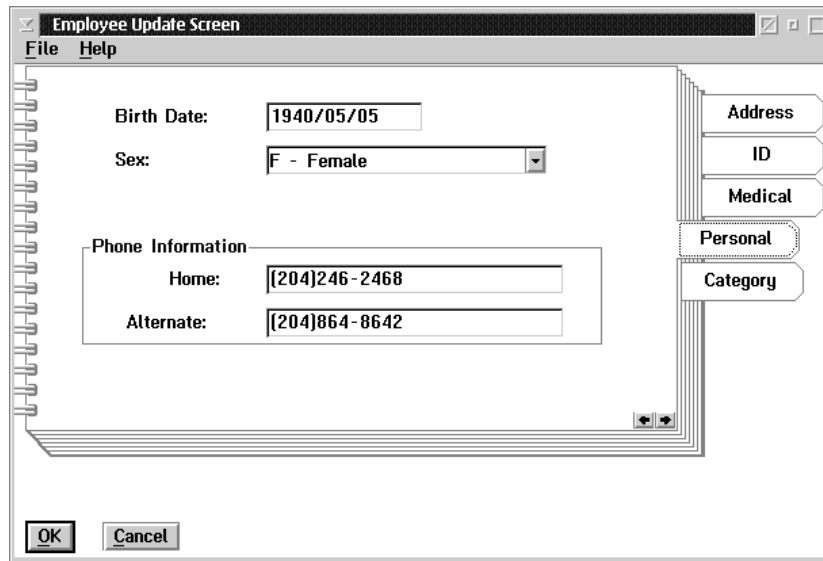
The Medical page appears as follows:



The following table contains a description of the fields in the screen:

| Field | Description |
|-------------------------|--|
| Medical Number | This field contains the medical number of this person only. |
| Family Number | The family medical number for the entire family is put in this field. |
| Reference Number | This is an additional medical reference number used by some provinces. |

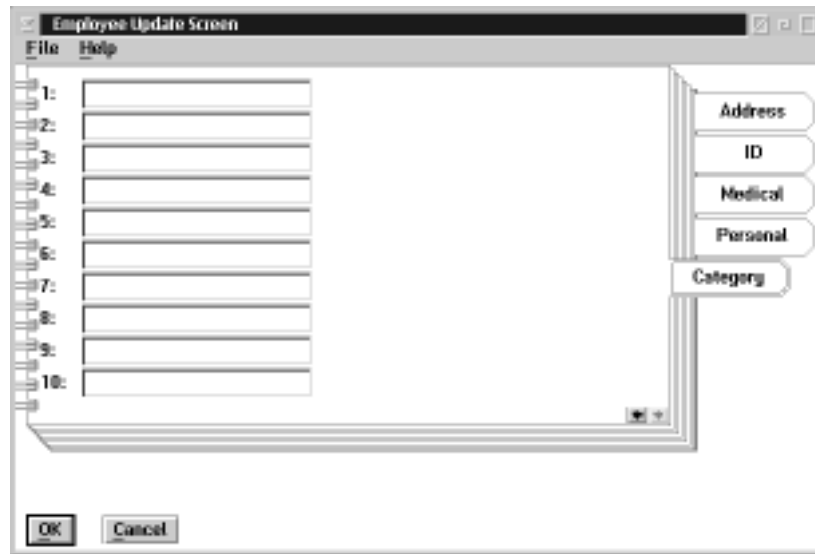
The Personal page appears as follows:



The following table contains a description of the fields in the screen:

| Field | Description |
|-------------------|--|
| Birth Date | The birth date of the employee should be entered into this field in YYYY/MM/DD format. |
| Sex | Either "M" for male, or "F" for female is used to enter in the employee's sex in this field. Data can be entered into this field using the pull down menu. |
| Home | The home phone number of the employee can be entered into this field. |
| Alternate | An alternate phone number used to reach the employee may be placed in this field. |

The Category page appears as follows:



The category page of the notebook contains the following data fields:

- The screen contains 10 fields that contain 10 character code.
- These codes are defined in the code validation update with the description of the user defined code.
- These can be any codes that you want to use to sort or categorize your group of employees.

For all the notebook pages the following functions are possible:

Save

The OK button or the **Save** option from the File menu will save any changes made within the Main Employee Data screen.

Esc (exit)

The ESC key, the CANCEL button, or the **Exit** option from the File menu will exit the screen without saving any changes.

Deleting Employees

To delete an existing employee follow these steps:

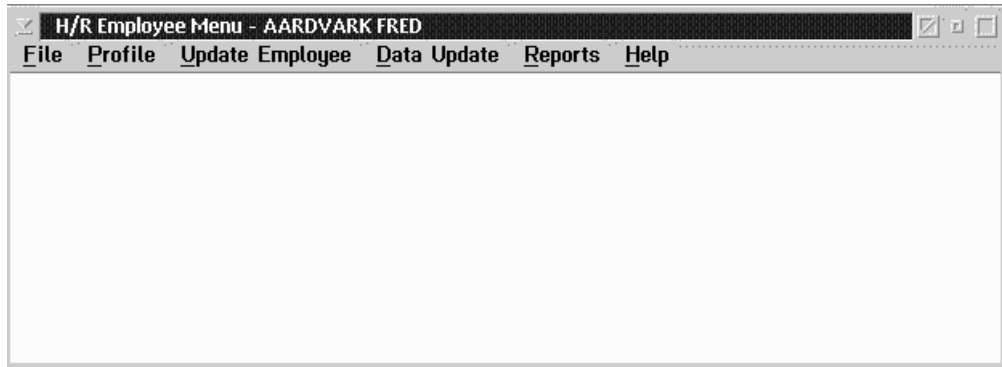
1. Select the **Employee Update** option in the Employee menu.
2. When the Employee Name Selection dialog box appears select the F8 key, or the **List** option in the File menu to obtain a list of employees.
3. Move the selection bar to the employee to delete.
4. Select the DELETE button at the bottom of the Employee Name Order dialog box.
5. A message will appear asking you to confirm the deletion. Select the YES button to delete, or the NO button to cancel the deletion process.



An employee with current year records will not be deleted but will be disabled and will not appear on any current lists of employees. To view any disabled employees select show deleted employees under the file menu option.

Employee Menu

The **Employee Menu** is used to access functions that are restricted to a single employee. Any changes made through options in the H/R Employee Menu screen will only apply to the currently selected employees. The functions on this menu are identical to the functions on the main menu.



Profile Query

The Human Resource Profile is a way to display all the Human Resource information known on an employee in one notebook. The advantage of using this program is that you may view the information in one spot rather than accessing several items of the menu to obtain the same information.

You may select different employees, print a report of the employee or change the date range you are viewing or the payroll sequence.

When the address tab of the Profile notebook is chosen the following screen will appear:



EMPLOYEE INFORMATION

The following table gives a description of the data fields:

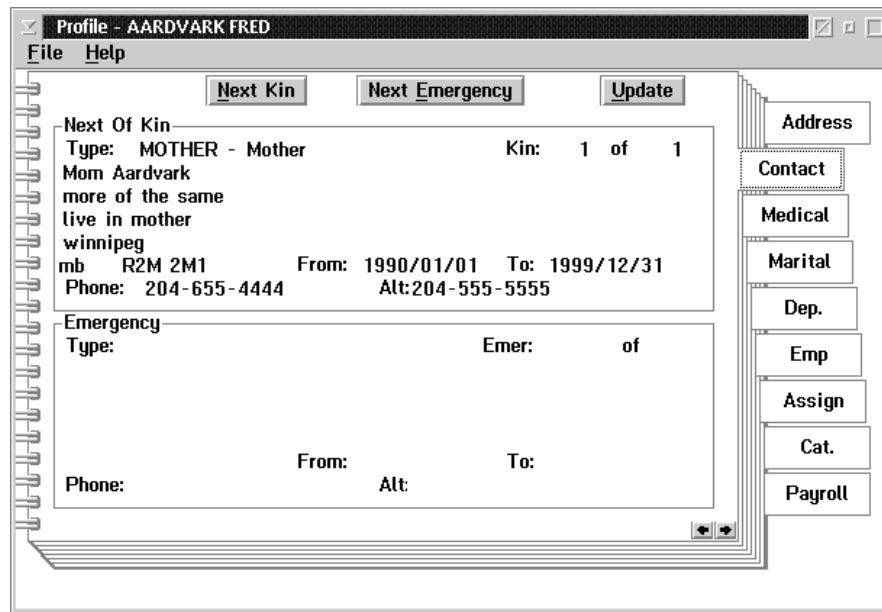
| Field | Description |
|-------------------------------|---|
| Name | This field contains the first name of the employee. |
| Surname | This field contains the last name of the employee. |
| Given Name | This field contains the given name of the employee. |
| Address | This field contains the address of the employee. |
| Phone | This field contains the phone number of the employee. |
| Alternate Phone Number | This field contains an alternate phone number of the employee. |
| Badge | This field contains the badge number of the employee. |
| Birth Date | This field contains the birth date of the employee. |
| Band | If the employee has a band name it will appear in this field. |
| Treaty | If the employee has a treaty number it will appear in this field. |

| | |
|---------------|--|
| S.I.N. | This field contains the social insurance number of the employee. |
| Sex | This field contains the sex of the employee. |

Update

The update button will take you to the Employee Update screen and upon exiting the update you will be returned to the Employee profile.

When the Contact tab is chosen the following screen will appear:



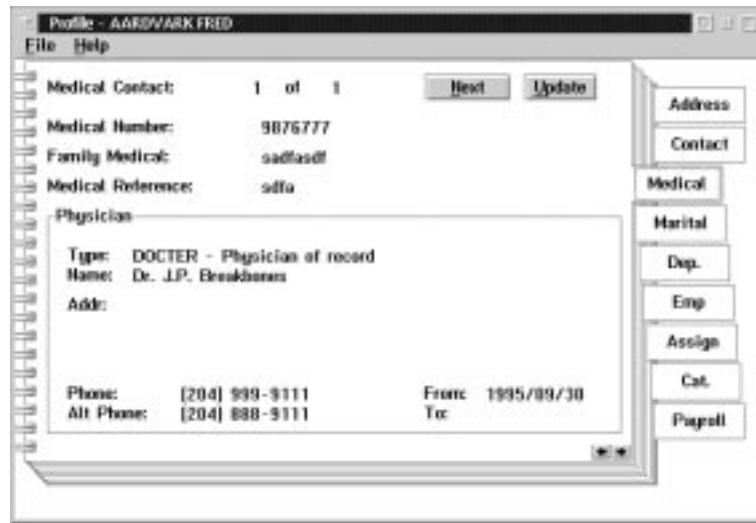
The following table gives a description of the data fields:

| Field | Description |
|-------------------------------|---|
| Next of Kin | This field contains the name of the employees next of kin. |
| Address | This field contains the address of the next of kin. |
| Phone | This field contains the phone number of the employees' next of kin. |
| Alternate Phone number | This field contains an alternate phone number of the employees next of kin. |

Update

The Update button allows you to update a list of people to contact in case of an emergency.

When the Medical tab is chosen the following screen will appear:



The following table gives a description of the data fields:

| Field | Description |
|--------------------------|--|
| Medical Number | This field contains the medical number of the employee. |
| Family Medical | This field contains the family medical number of the employee. |
| Medical Reference | This field contains the medical reference number of the employee. |
| Physician | This field contains the physician name of the employee. |
| Address | This field contains the employees physicians address. |
| Phone | This field contains the employees physicians phone number |
| Alternate | This field contains an alternate phone number of the employees physician |

Update

The update button allows you to update a list of people to contact in case of an emergency.

When the Marital tab is chosen the following screen will appear:



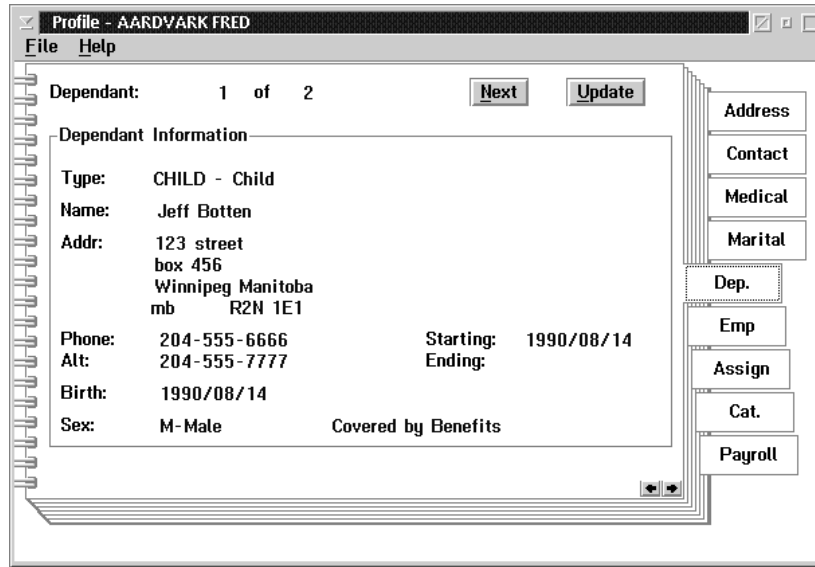
The following table gives a description of the data fields.

| Field | Description |
|-------------------|---|
| Type | This field contains the marital information of the employee. For example married or single. |
| Name | This field contains the employees' spouse's name. |
| Address | This field contains the address of the employees spouse. |
| Phone | This field contains the phone number of the employees spouse. |
| Alternate | This field contains an alternate phone number of the employee. |
| Birth date | This field contains the birth date of the employees spouse. |
| Sex | This field contains the sex of the employees spouse. |

Update

The update button allows you to update the marital status of the employee.

When the Dependant tab is chosen the following screen will appear:



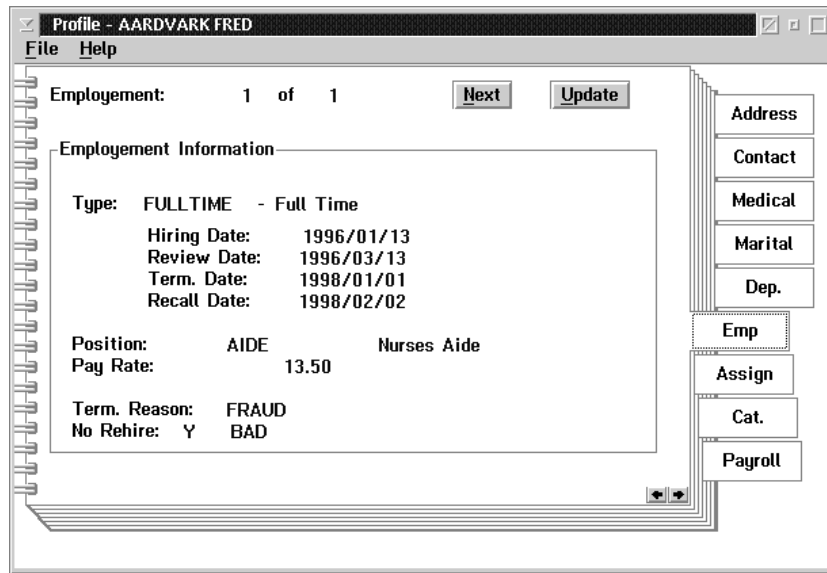
The following table gives a description of the data fields:

| Field | Description |
|------------|---|
| Type | This field contains the dependant information of the employee. |
| Name | This field contains the dependants name of the employees' dependant. |
| Address | This field contains the address of the employee's dependant. |
| Phone | This field contains the phone number of the employee's dependant. |
| Alternate | This field contains an alternate phone number of the employee's dependant |
| Birth date | This field contains the birth date of the employee's dependant. |
| Sex | This field contains the sex of the employee's dependant. |

Update

The update button accesses the function to update the employee's dependants.

When the Employment tab is chosen the following screen will appear:



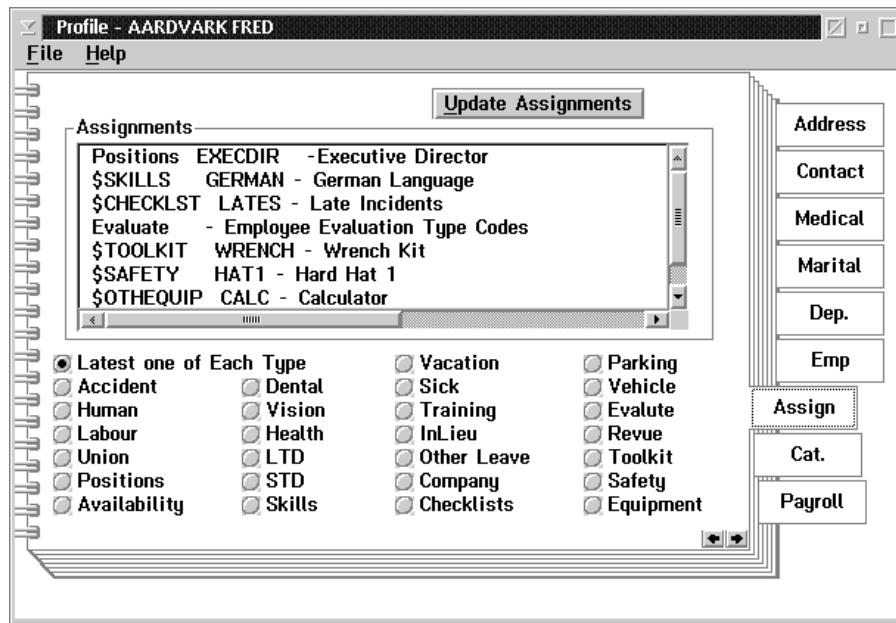
The following table gives a description of the data fields:

| Field | Description |
|-------------------------|---|
| Type | This field contains the type of employment either full time or part time. |
| Hiring Date | This field contains the date the employee was hired. |
| Review Date | This field contains the review date of the employee. |
| Termination Date | This field contains the date the employee was terminated. |
| Recall Date | This field contains the date the employee was recalled. |
| Position | This field contains the position of the employee. |
| Pay Rate | This field contains the rate of pay for the employee. |
| Term. Reason | This field contains the reason the employee was terminated. |
| No Rehire | When this field has a Y beside it do not rehire. |

Update

The update button allows you to update the employment period.

When the Assignment tab is chosen the following screen will appear:



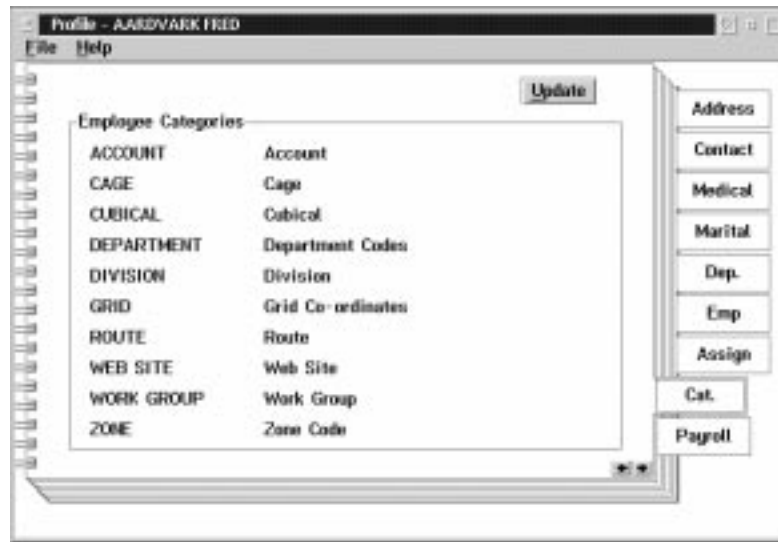
When the notebook page is called up it will show you the latest assignment of each type and what radio button will be selected.

When selecting the other radio buttons the screen will show all the assignments of that type.

When you have a type selected you may use the update button to add change or delete the assignments.

The information shown for each assignment is the type of assignment, the assignment code and the description.

When the Category tab is chosen the following screen will appear:



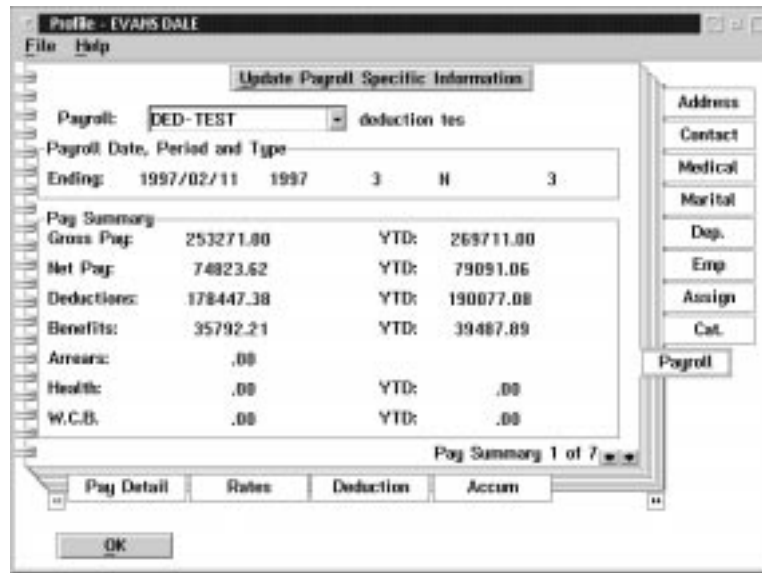
The following table gives a description of the screen:

| Field | Description |
|---------------------|---|
| Employee Categories | The employee level category is a user defined set of data items which pertain to a particular employee or a predefined set of data items which are shared by several employees. This set of data items assists in identifying other pertinent information that the company may wish to track within their employee data base. |

Update

The Update button will bring up the Employee Update screen.

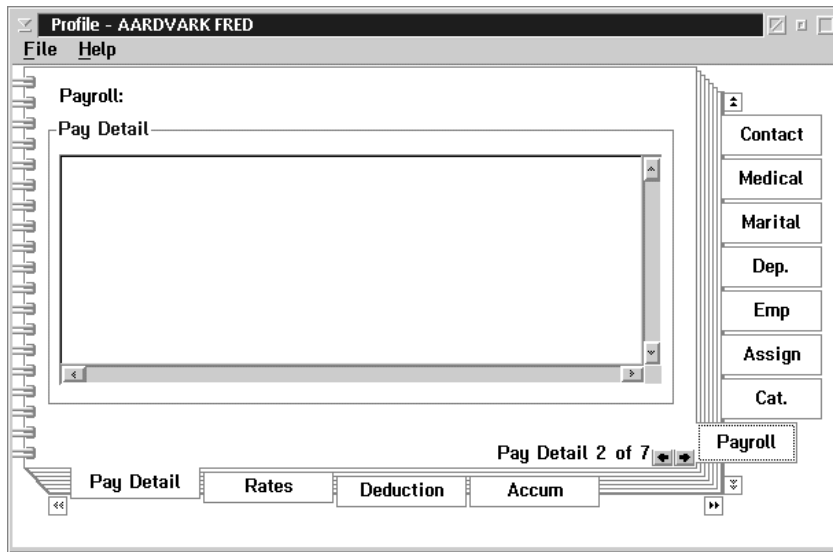
When the Payroll tab is chosen the following screen will appear:



The Payroll tab displays the results of a payroll calculation for an employee. The file menu contains a choice that can be used to scan through the employees pay history.

The "Payroll" list box can be used to select the payroll to view for the employee.

When the Pay Detail tab is chosen the following screen will appear:



☞ The Pay Details Tab shows the detail transactions for the pay run selected.

When the Rate tab is chosen the following screen will appear:

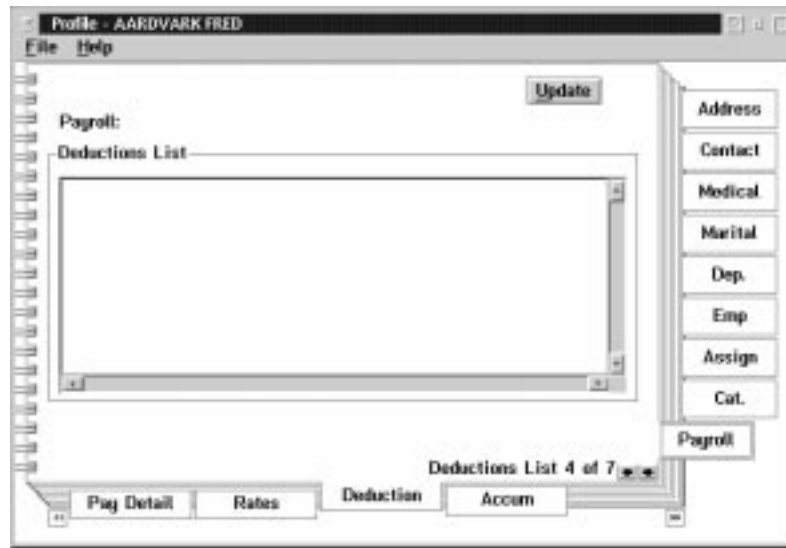


☞ The Rates Tab shows the employee earnings and the pay rates associated with those earnings.

Update

The Update button will display the list of employee earnings that allows you to update or insert new earnings for the employee.

When the Deduction tab is chosen the following screen will appear:

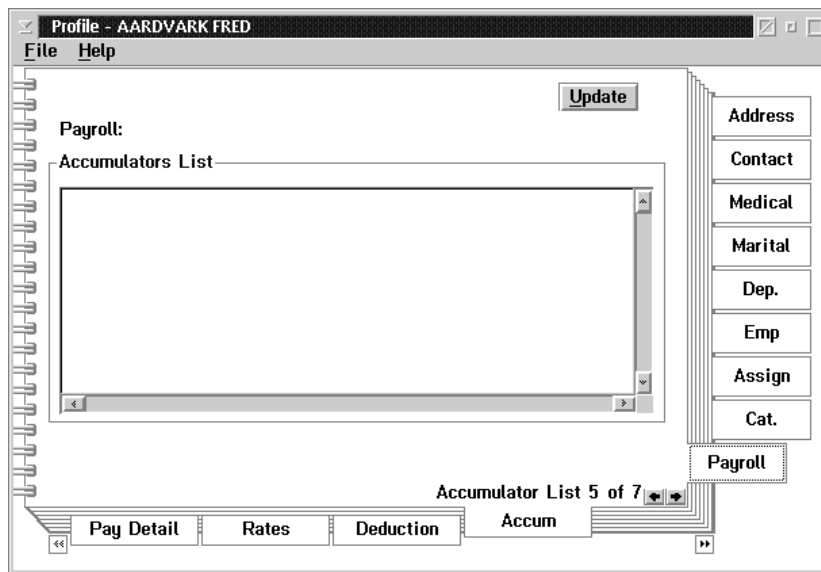


The Deduction Tab shows the deductions that are set up for the employee

Update

The Update button is used to update the employees deduction settings.

When the accumulator tab is chosen the following screen will appear:

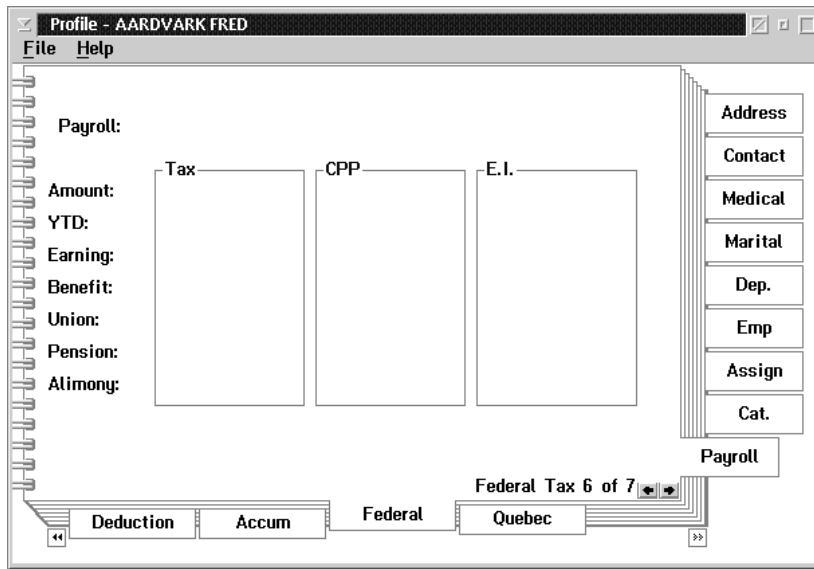


The Accumulator tab shows the accumulators that are set up for the employee.

Update

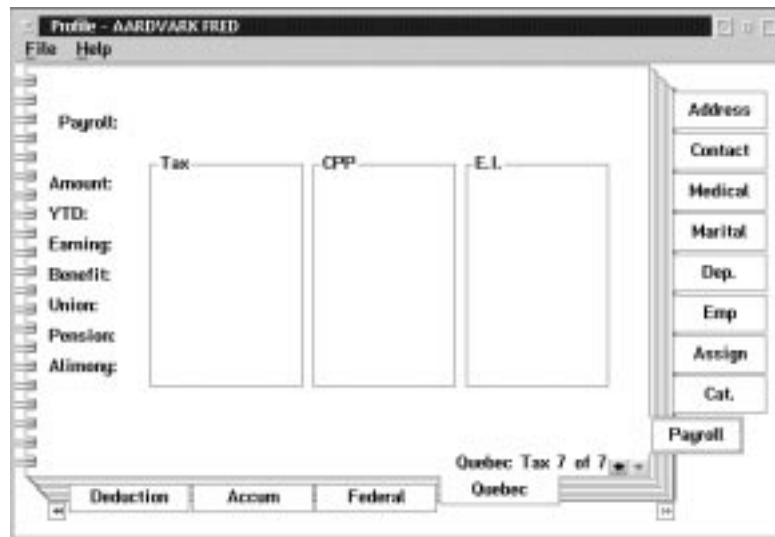
The Update button is used to update the employee accumulators set up

When the Federal tab is chosen the following screen will appear:



The Federal Tab shows a summary of federal payroll deductions.

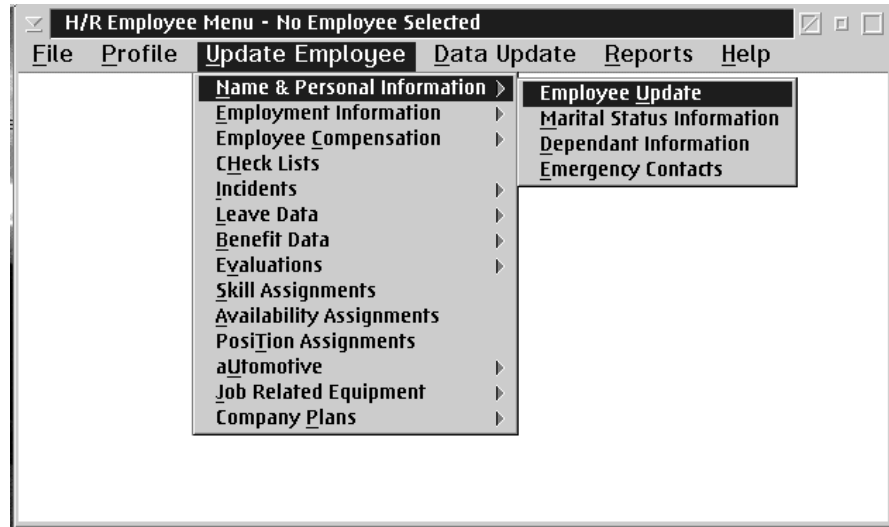
When the Quebec tab is chosen the following screen will appear:



The Quebec Tab shows a summary of Quebec payroll deductions

Name & Address Personal Information

The Name & Personal Information menu from the Human Resources Employee Menu is used to update an employees personal information..



This option allows the user to assign the following information for employees:

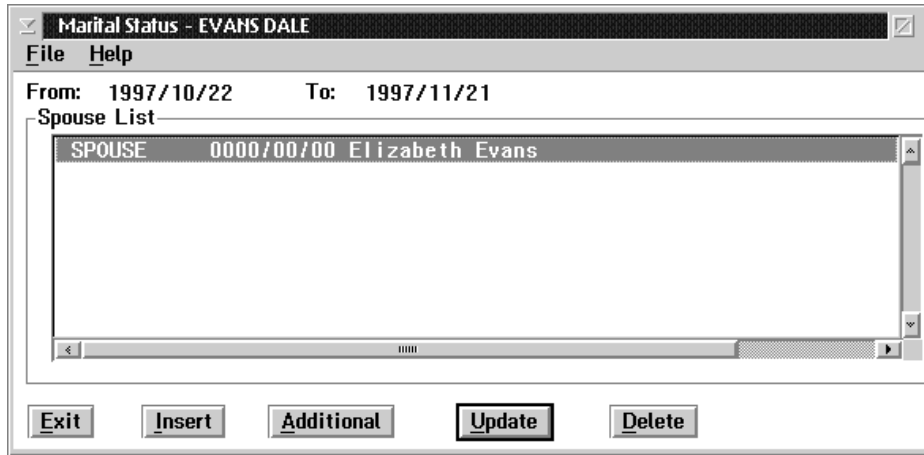
- Update an employees address, ID, medical and phone number
- Marital Status
- Dependant Information
- Emergency Contacts

Employee Update

Please refer to page 26-30 for more information on Employee Updates

Marital Status

When the Marital Status option from the Name & Personal Information is selected the following screen will appear:



The following table gives a description of the data fields:

| Field | Description |
|-------------|---|
| From | The starting date of the date range is displayed in this field. |
| To | The ending date of the date range is displayed in this field. |
| Spouse List | This field will display a list of spouse/s. |

- Set Date Range** The **Set Date Range** option from the File menu will allow the user to change the date range.
- Insert** The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.
- Additional** The ADDITIONAL button, or the **Additional for Employee** option from the File menu will allow the user to enter another entry for the same employee selected by the selection bar. This saves the user the step of selecting the employee again.
- Update** The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.
- Delete** The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.
- Esc (exit)** The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

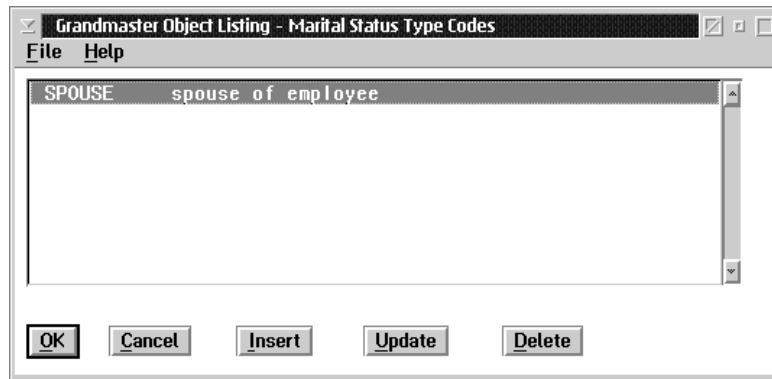
When the Marital status item is inserted or updated the following dialog box will appear:



The following table gives a description of the data fields:

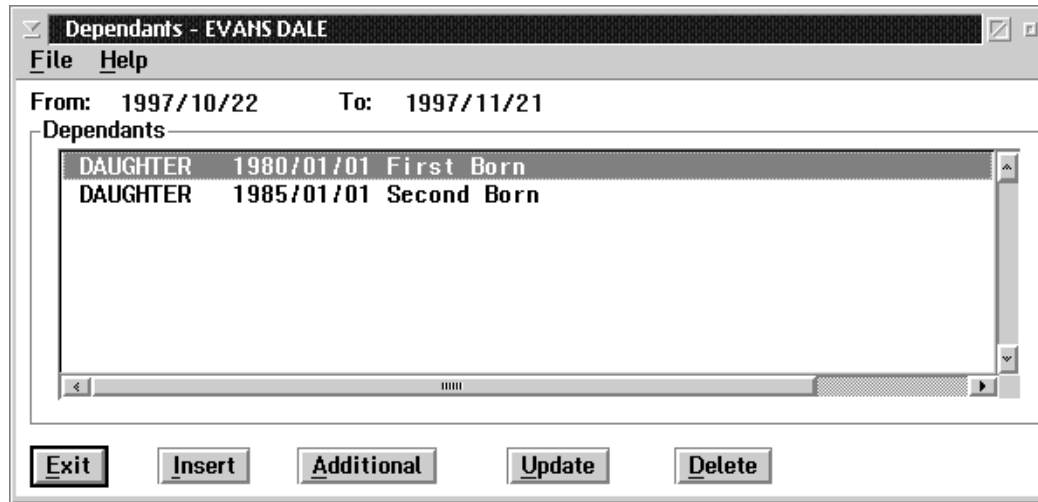
| Field | Description |
|--------------------------------|--|
| Status | This field is used to enter the status of the employee. For Example single, married, divorced. |
| Start Date | This field is used to enter the start date of the person's relationship to the employee. |
| End Date | This field is used to enter the end date of the person's relationship to the employee. |
| Name | This field contains the name of the employee's spouse. |
| Address 1 | This field contains the address of the employee's spouse. |
| Address 2 | This field contains an alternate address of the employee's spouse. |
| City | This field contains the city the employee's spouse lives in. |
| Province | This field contains the province the employee's spouse lives in. |
| Postal | This field contains the employee's spouses postal code. |
| Phone 1 | This field contains the phone number of the employee's spouse. |
| Phone 2 | This field contains an alternate phone number of the employee's spouse. |
| Birth Date | This field contains the birth date of the employee's spouse. |
| Sex | This field contains the sex of the employee's spouse. |
| Covered by Benefit Plan | When this field is checked the employee's spouse is covered under the employees' benefit plan. |

When you press the F8 key in the status field of the spouse status screen the following screen will appear:



Dependant Status Information

When the Dependant option from the Name & Personal Information is selected the following screen will appear:



The following table gives a description of the data fields:

| Field | Description |
|-----------------------|---|
| From | The starting date of the date range is displayed in this field. |
| To | The ending date of the date range is displayed in this field. |
| Dependent List | This field lists the dependants on file. |

Set Date Range The **Set Date Range** option from the File menu will allow the user to change the date range.

Insert The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.

Additional The ADDITIONAL button, or the **Additional for Employee** option from the File menu will allow the user to enter another entry for the same employee selected by the selection bar. This saves the user the step of selecting the employee again.

Update The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.

Delete The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.

Esc (exit) The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

When the dependant status item is inserted or updated the following dialog box will appear:

The following table gives a description of the data fields:

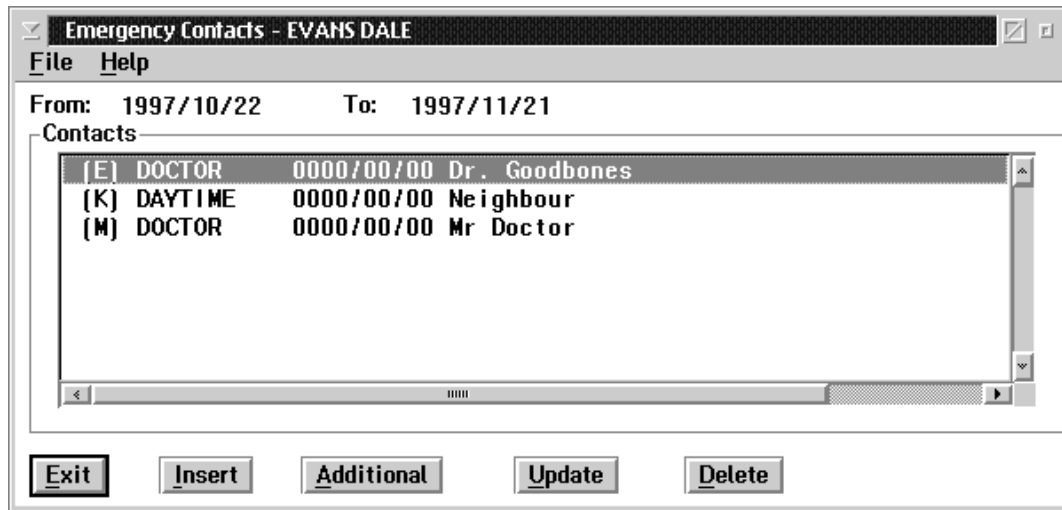
| Field | Description |
|--------------------------------|---|
| Type | This field is used to enter the type of the dependant. For Example children, wife or husband. |
| Start Date | This field is used to enter the start date of the person's relationship to the employee. |
| End Date | This field is used to enter the end date of the person's relationship to the employee. |
| Name | This field contains the name of the employees dependant |
| Address 1 | This field contains the address of the employees dependant. |
| Address 2 | This field contains an alternate address of the employees dependant. |
| City | This field contains the city the employees dependant lives in. |
| Province | This field contains the province the employees dependant lives in. |
| Postal | This field contains the employees dependants postal code. |
| Phone 1 | This field contains the phone number of the employees' dependant. |
| Phone 2 | This field contains an alternate phone number of the employees' dependant. |
| Birth Date | This field contains the birth date of the employees' dependant. |
| Sex | This field contains the sex of the employees' dependant. |
| Covered by Benefit Plan | When this field is checked the employees' dependant is covered under the employees' benefit plan. |

When you press the F8 key in the status field of the dependant status screen the following screen will appear:



Emergency Contacts

When the Emergency contacts option from the Name & Personal Information is Selected the following screen will appear:



The following table gives a description of the data fields:

| Field | Description |
|---------------|---|
| From | The starting date of the date range is displayed in this field. |
| To | The ending date of the date range is displayed in this field. |
| Contacts List | The list of emergency contact person will display. |

Set Date Range The **Set Date Range** option from the File menu will allow the user to change the date range.

Insert The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.

Additional The ADDITIONAL button, or the **Additional for Employee** option from the File menu will allow the user to enter another entry for the same employee selected by the selection bar. This saves the user the step of selecting the employee again.

Update The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.

Delete The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.

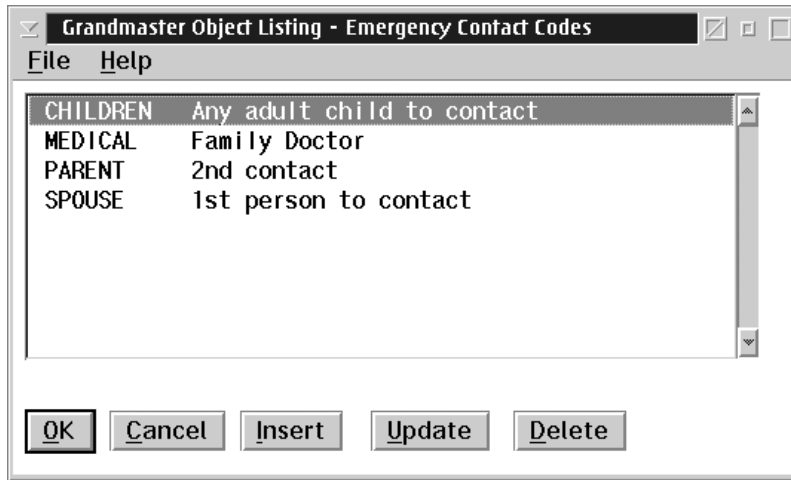
Esc (exit) The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

When the Emergency contact is inserted or updated the following dialog box will appear:

The following table gives a description of the data fields:

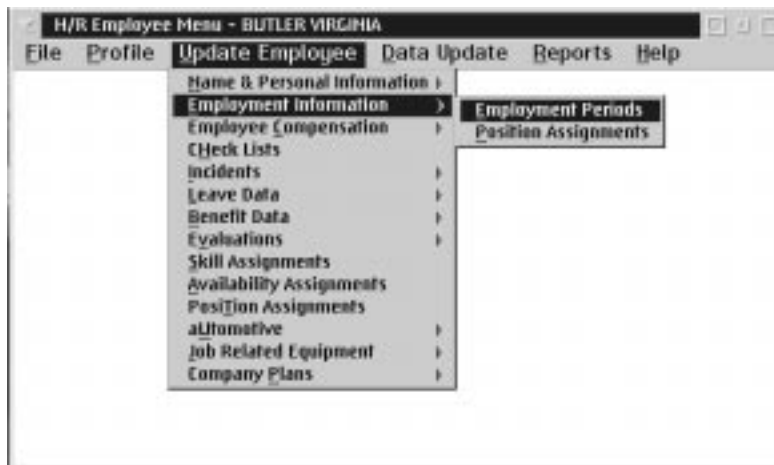
| Field | Description |
|--------------------------|---|
| Type | This field is used to enter the type of the dependant. For Example children, wife or husband. |
| Name | This field contains the name of the employee's dependant |
| Address 1 | This field contains the address of the employee's dependant. |
| Address 2 | This field contains an alternate address of the employee's dependant. |
| City | This field contains the city the employee's dependant lives in. |
| Province | This field contains the province the employee's dependant lives in. |
| Postal | This field contains the employee's dependants' postal code. |
| Phone 1 | This field contains the phone number of the employee's dependant. |
| Phone 2 | This field contains an alternate phone number of the employees dependant. |
| Start Date | This field is used to enter the start date of the person's relationship to the employee. |
| End Date | This field is used to enter the end date of the person's relationship to the employee. |
| Medical Contact | When this field is checked the medical contact will be displayed. |
| Next of Kin | When this field is checked the employee's next of kin will be displayed. |
| Emergency Contact | When this field is checked the employee's emergency contact will be displayed. |

When you press the F8 key in the status field of the Contact Type screen the following screen will appear:



Employment Information

The Employment information sub menu appears as follows:

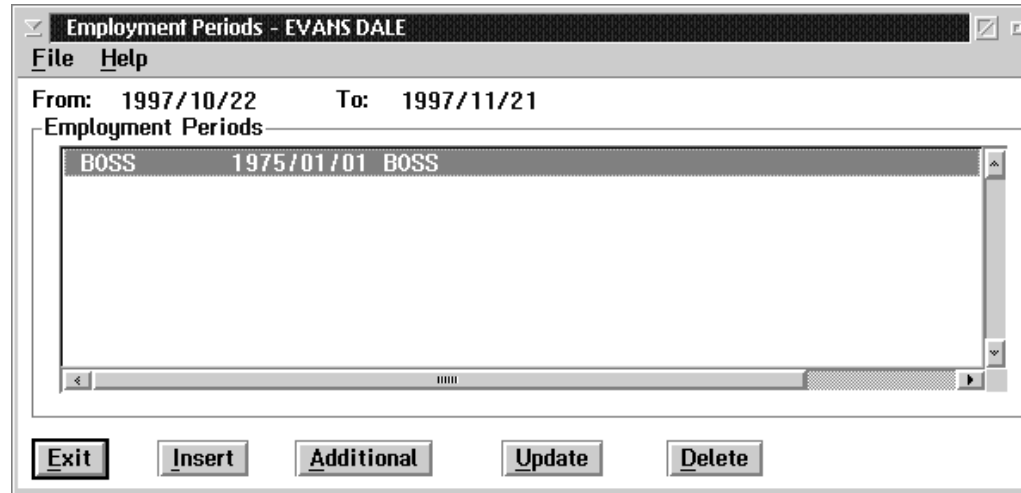


The following Employment information is available:

- Employment Periods
- Position Assignments

Employment

When the Employment Assignment option from the Employment information menu is selected the following screen will appear:



The following table gives a description of the data fields:

| Field | Description |
|---------------------------|--|
| From | This field is the starting date of the employment assignment.. |
| To | This field is the ending of the employment assignment. |
| Employment Periods | This field will display the employment periods on file. |

INSERT The INSERT button allows you to insert employment status

ADDITIONAL The ADDITIONAL button allows you to add an additional employment status

UPDATE The UPDATE button allows you update an existing employment status

DELETE The DELETE button allows you to delete an existing employment status

EXIT The EXIT button allows you to exit the employment status

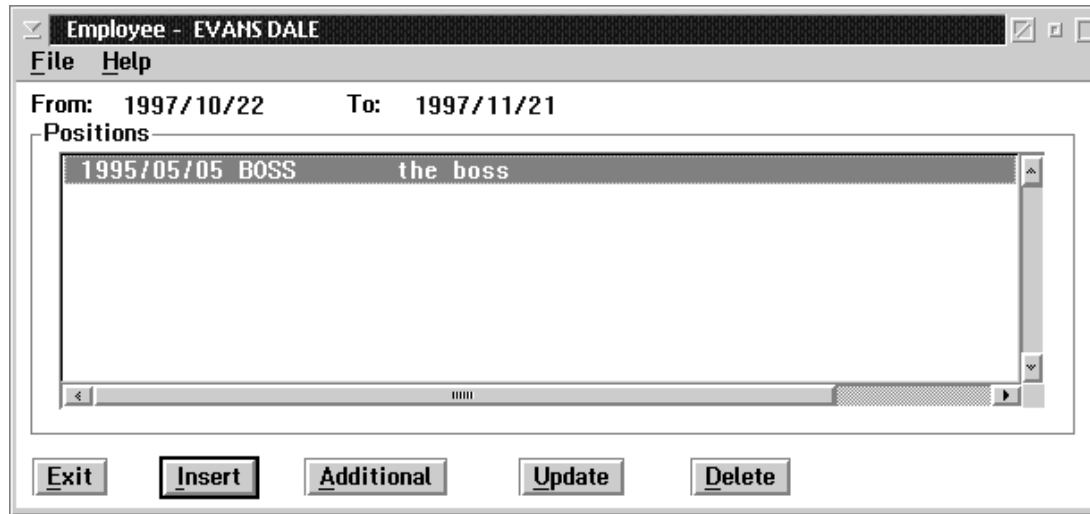
When an employment period is inserted or updated the following dialog box will appear:

The following table gives a description of the data fields:

| Field | Description |
|----------------------|---|
| Type | This field contains the type of employment. |
| Hire Date | This field contains the date the employee was hired. |
| Position | This field contains the position of the employee. |
| Review | This field contains the review date of the employee. |
| Pay Rate | This field contains the employees rate of pay. |
| Date | This field contains the termination date of the employee. |
| Recall | This field contains the recall date of the employee. |
| Reason | This field contains the reason the employee was terminated. |
| Do Not Rehire | When this field is checked do not rehire the employee. |

Position Assignment

When the Position Assignment option from the Employment Information menu is selected the following screen will appear:



The following table gives a description of the data fields:

| Field | Description |
|------------------|--|
| From | This field is the starting date of the position assignment.. |
| To | This field is the ending of the position assignment. |
| Positions | This field will display the positions on file for the employ ee. |

INSERT The INSERT button allows you to insert a position

ADDITIONAL The ADDITIONAL button allows you to add an additional position

UPDATE The UPDATE button allows you update an existing position

DELETE The DELETE button allows you to delete an existing position

EXIT The EXIT button allows you to exit the position

When a Position is inserted or updated the following dialog box will appear:

The screenshot shows a dialog box titled "Employee Position Assignment" with a menu bar containing "File" and "Help". The dialog contains four input fields: "Position" with the value "BOSS" and a label "the boss" to its right; "Employee" with the value "EVANS DALE"; "Start Date" with the value "1995/05/05"; and "End Date" with the value "0000/00/00". At the bottom left, there are two buttons: "OK" and "Cancel".

The following table gives a description of the data fields:

| Field | Description |
|------------|---|
| Position | This field contains the position of the employee. |
| Employee | This field contains the employees name. |
| Start Date | This field contains the starting date of the employee for this position assignment. |
| End Date | This field contains the ending date of the employee for this position assignment. |

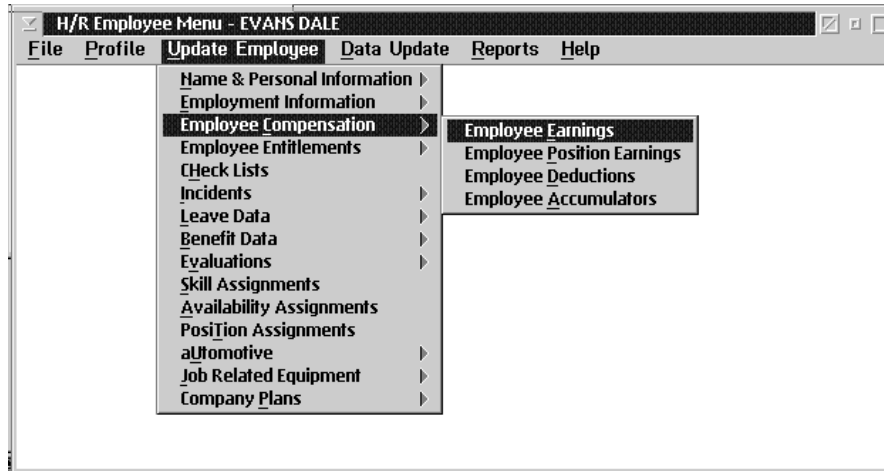
EMPLOYEE INFORMATION

When the F8 key is press in the Position field of the Employee Position Assignment screen the following screen will appear:

The screenshot shows a window titled "Position List Screen" with a menu bar containing "File" and "Help". The main area is a list box containing one entry: "AIDE Aide". At the bottom of the window, there are five buttons: "OK", "Cancel", "Insert", "Update", and "Delete".

Employee Compensation

When the user selects the Employee Compensation sub menu from the Update Employee menu the following screen will appear:

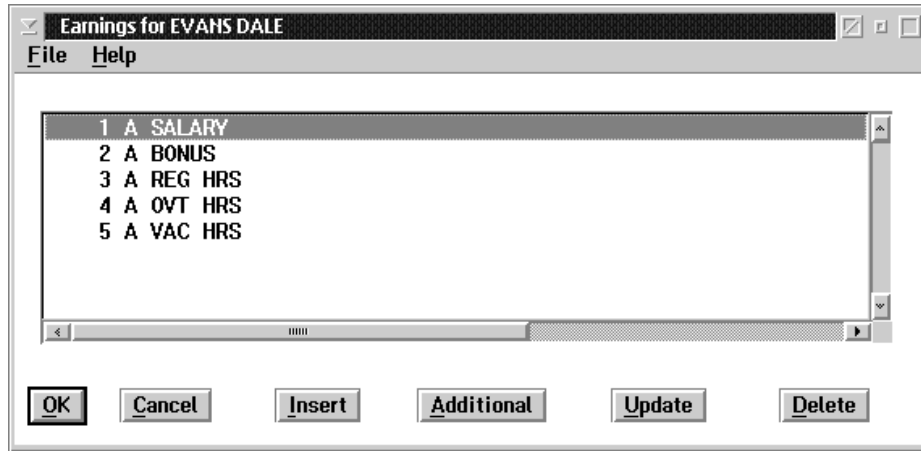


The Employee Compensation menu allows the user to set up all types of:

- Employee Earnings
- Employee Position Earnings
- Employee Deductions
- Employee Accumulators

Employee Earning

When the user selects Employee Earnings from the Update Employee menu the following screen will appear:



Insert

The Insert button allows the user to insert a new earning.

Additional

The Additional button allows the user to add an additional effective date range for an existing earning.

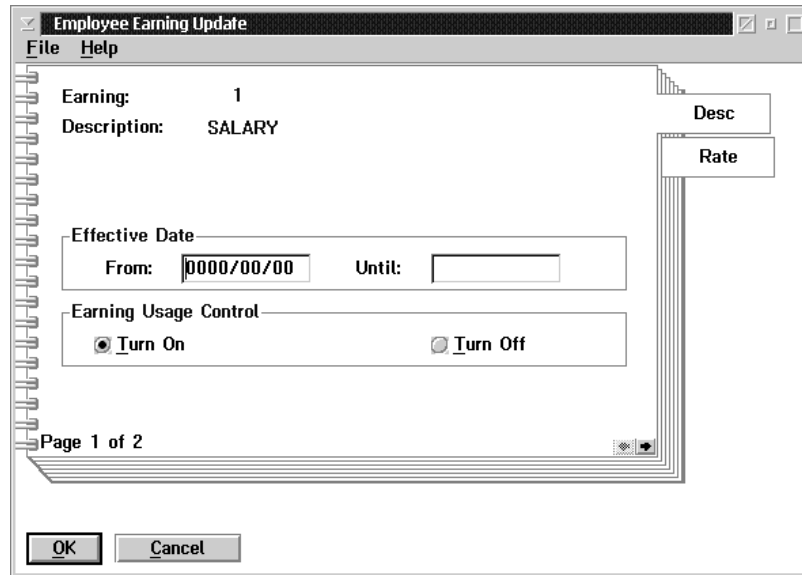
Update

The Update button allows the user to update an earning.

Delete

The Delete button allows the user to delete an earning.

When the user selects the update button from the Employee Earning screen the following screen appears:



The following table gives a description of the data fields:

| Field | Description |
|------------------------------|---|
| Earning | This field contains the code number of the earning. |
| Description | This field is used for describing the earning pop-up lists for reports. |
| From | This field is used to set the starting date of the effective data range for the earning. |
| Until | This field is used to set the ending date of the effective date range for the earning. |
| Earning Usage Control | If the earning enabled box is checked the earning is enabled. If the earning disabled box is checked the earning is disabled. |

When the user selects the rate tab the following screen will appear:

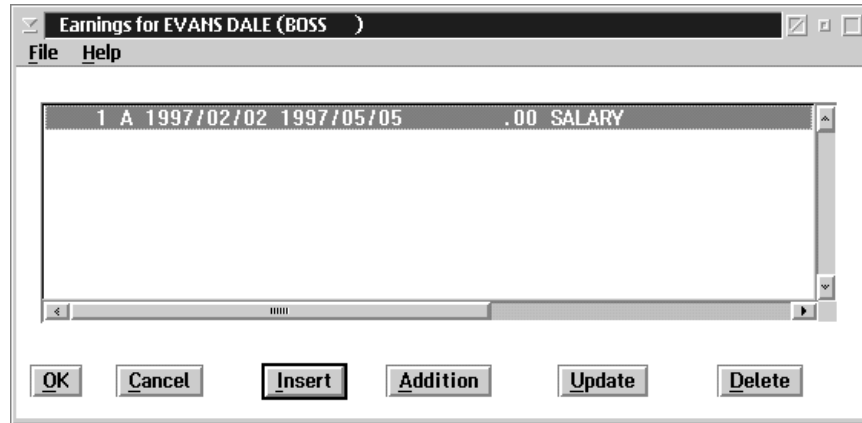


The following table gives a description of the data fields:

| Field | Description |
|------------------------------|--|
| Use Set Rate | This field contains the values entered in the Rate field and the setting if the Rate Units buttons to set a pay rate of the earning. When the annual button is pressed the value in the units field is treated as an amount of pay for each pay period. The value in the Rate field is treated as an amount of pay for each pay period, the value in the units field is treated as the standard number of hours worked in the pay period. When the hour button is pressed the value in the Rate field is treated as a rate per hour. The value in the hours field is treated as the standard number of hours worked per pay period. When the Piece Rate button is pressed the value in the field is the standard rate per piece. |
| Use Multiplier | This field contains the value in the multiplier field and the rate for the base rate earning to determine the rate for the earning. The rate for the earning is the product of the value in the multiplier field and the resolved rate for the earning type selected as the base earning. |
| Use Rate Table | This field contains a rate table to determine the rate value for the earning. The row and column fields can be used to determine the location in the rate table that has the rate value to use. The Table field allows the entry of the Rate table name to use. Note - the system supports any number of different rate tables. |
| Rate Units | This field contains a set of radio buttons that determine the period that the rate applies to. These buttons are "Pay Period", "Hour", "Annual" and "Piece". The rate unit selected will be used to determine the processing used when evaluating the rate of the pay calculation. |
| Set Rate Parameters | This field contains the field that is used when the "Use Set Rate" method is in use. |
| Multiple Parameters | This field contains fields that are used when the "Use Multiple" method is in use. |
| Rate Table Parameters | This field contains the fields that are used when the "Use Rate Table" method is in use. |
| Accumulator | This field contains the accumulator which affects the earning. |

Employee Position

When the user selects Employee Position Earnings from the Update Employee menu the following screen will appear:



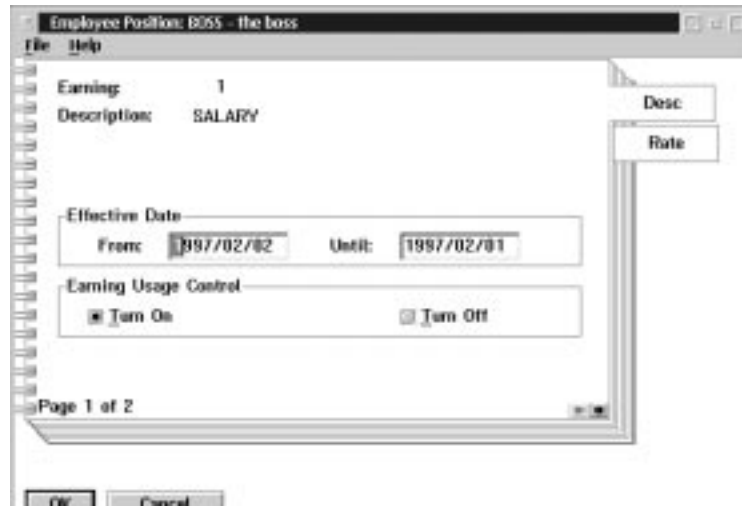
Insert The Insert button allows the user to insert a new position earning.

Additional The Additional button allows the user to add an additional effective date range for an existing position earning.

Update The Update button allows the user to update a position earning.

Delete The Delete button allows the user to delete a position earning.

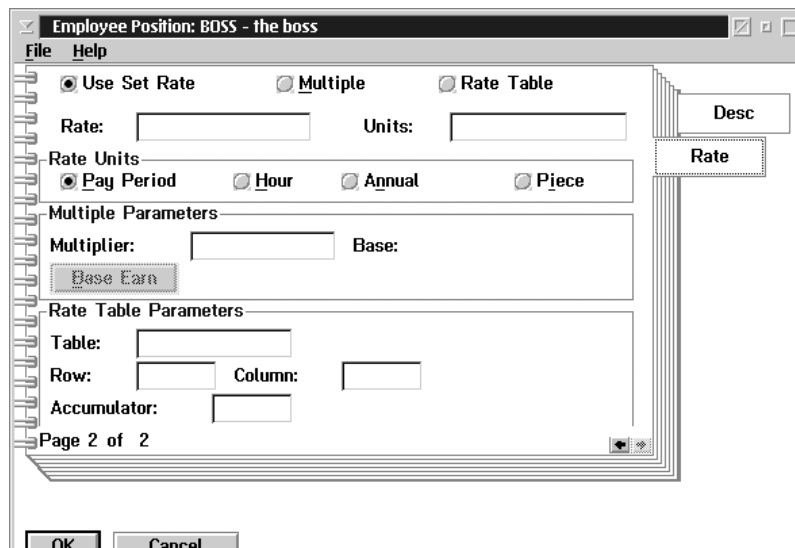
When the user selects the update button from the Position Earning for the Employee screen the following screen will appear as follows:



The following table gives a description of the data fields:

| Field | Description |
|------------------------------|---|
| Earning | This field contains the code number of the position earning. |
| Description | This field is used for describing the position earning. |
| From | This field is used to set the starting date of the effective date range for the earning. |
| Until | This field is used to set the ending date of the effective date range for the earning. |
| Earning Usage Control | If the earning enabled box is checked the earning is enabled. If the earning disabled box is checked the earning is disabled. |

When the user selects the rate tab the following screen will appear:

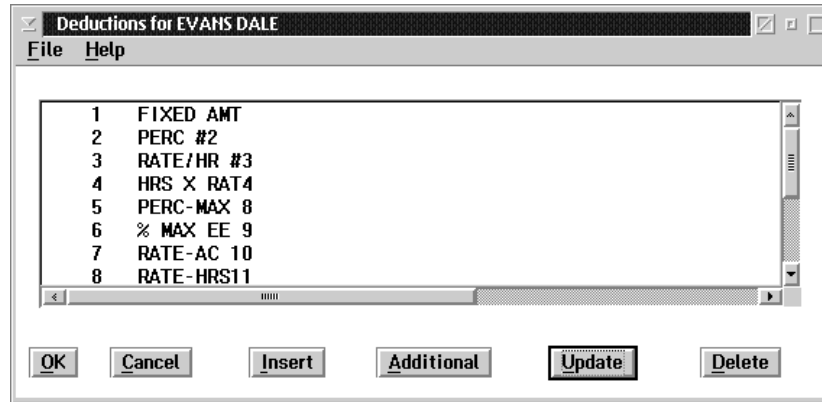


The following table gives a description of the screen:

| Field | Description |
|------------------------------|--|
| Use Set Rate | This field contains the values entered in the Rate field and the setting if the Rate Units buttons to set a pay rate of the earning. When the annual button is pressed the value in the units field is treated as an amount of pay for each pay period. The value in the Rate field is treated as an amount of pay for each pay period. When the hour button is pressed the value in the Rate field is treated as a rate per hour. The value in the hours field is treated as the standard number of hours worked per pay period. When the Piece Rate button is pressed the value in the field is the standard rate per piece. |
| Use Multiplier | This field contains the value in the multiplier field and the rate for the base rate earning to determine the rate for the earning. The rate for the earning is the product of the value in the multiplier field and the resolved rate for the earning type selected as the base earning. |
| Use Rate Table | This field contains a rate table to determine the rate value for the earning. The row and column fields can be used to determine the location in the rate table that has the rate value to use. The Table field allows the entry of the Rate table name to use. Note - the system supports any number of different rate tables. |
| Rate Units | This field contains a set of radio buttons that determine the period that the rate applies to. These buttons are "Pay Period", "Hour", "Annual" and "Piece". The rate unit selected will be used to determine the processing used when evaluating the rate of the pay calculation. |
| Set Rate Parameters | This field contains the field that is used when the "Use Set Rate" method is in use. |
| Multiple Parameters | This field contains fields that are used when the "Use Multiple" method is in use. |
| Rate Table Parameters | This field contains the fields that are used when the "Use Rate Table" method is in use. |
| Accumulator | This field contains the accumulator which affects the earning. |

Employee Deductions

When the user selects Deductions from the Employee Compensation menu the following screen will appear:



Insert

The Insert button allows the user to insert a new deduction

Additional

The Additional button allows the user to add an additional effective date range for an existing deduction.

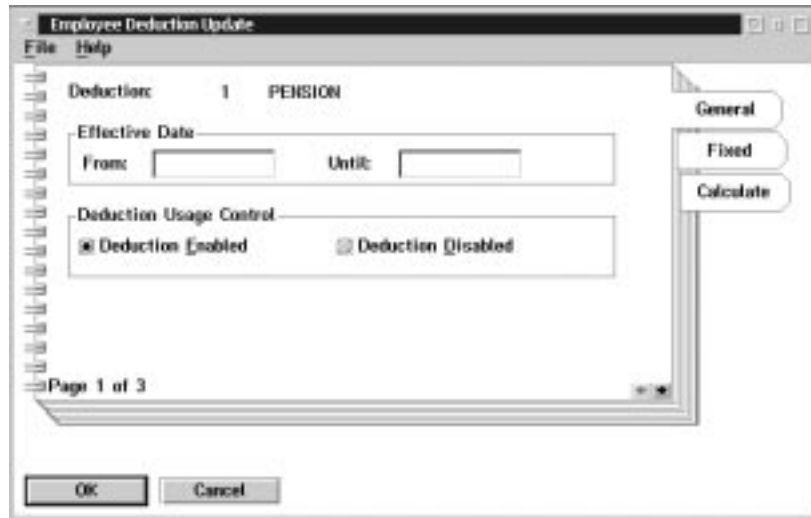
Update

The Update button allows the user to update a deduction.

Delete

The Delete button allows the user to delete a deduction.

When the user selects the update button from the Employee Deduction screen the following screen will appear as follows:

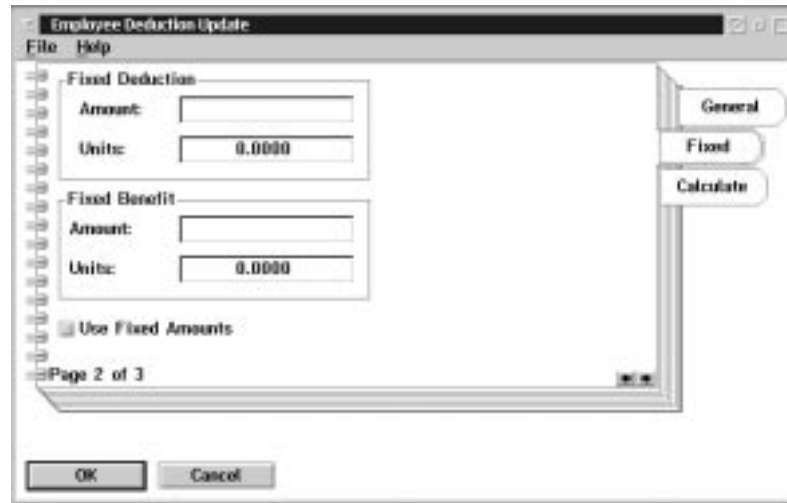


The GENERAL page contains fields for describing the deduction and setting the effective date range of the deduction type.

The following table gives a description of the data fields:

| Field | Description |
|--------------------------------|--|
| Deduction | This field contains the code number of the deduction. |
| From | This field is used to set the starting of the effective date range for the deduction. |
| Until | This field is used to set the end date of the effective date range for the deduction. |
| Deduction Usage Control | This field contains two buttons that are used to Enable or Disable the uses of the deduction type. When the deduction type is disabled the deduction will not be used for the pay process. |

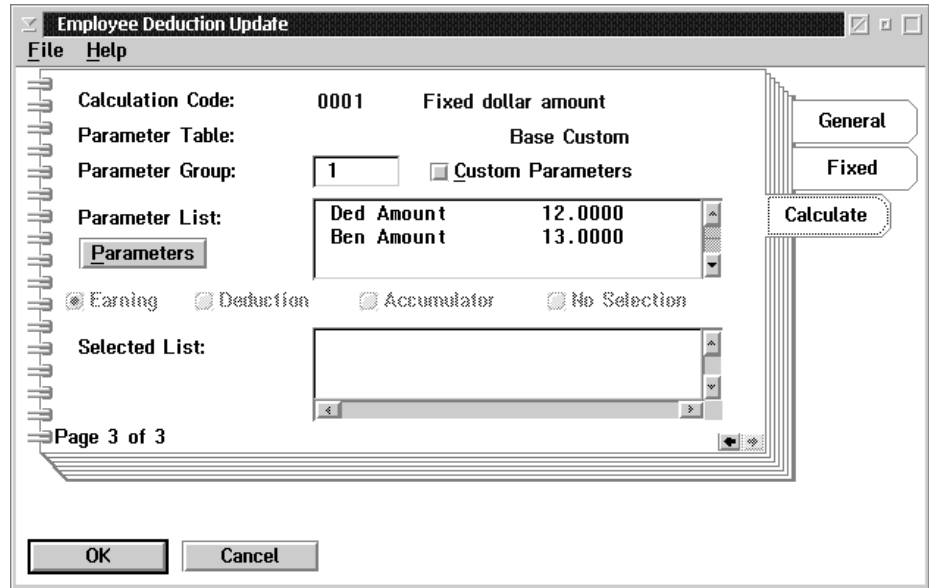
The Fixed Page contains fields that are used to input fixed amounts that are used to input fixed amounts for the deduction process. When you select the Fixed tab on the Deduction Update the following screen will appear:



The following table gives a description of the data fields:

| Field | Description |
|-----------------------|---|
| Amount | This field contains the value that should be deducted for an employee for each period based on the values in the Evaluation box. |
| Unit | This field contains the values that should be deducted for an employee for each period based on the values in the Evaluation box. |
| Evaluation Box | This field contains the Use Fixed Values check box. |

The Calculate page is used to set the values for the calculation that will be used to determine the amounts to be added to the deduction. When you select the Calculate tab on the Deduction update the following screen will appear:

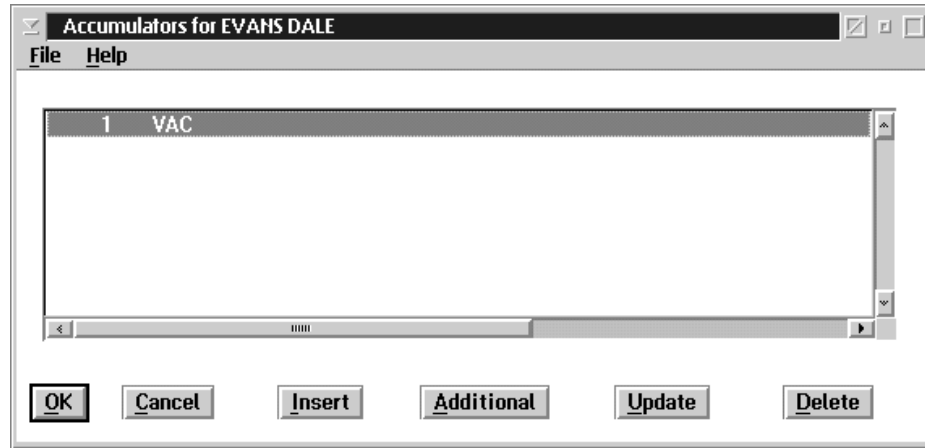


The following table gives a description of the data fields:

| Field | Description |
|--------------------------|---|
| Calculation Code | This field is used to enter the number of the calculation code that will be used to calculate the value to add to the deduction. A list of calculation codes can be displayed by pressing the F8 key when the Calculation code field is selected. |
| Parameter Table | This field is used to enter the name of a parameter table. A list of the tables already defined can be obtained by pressing the F8 key when the Parameter field is selected. |
| Parameter Group | This field is used to enter the default group (row) for the deduction type. |
| Custom Parameters | This field is used to enter the default group (row) for the deduction type. |
| Table Parameters | This field is used to call up a screen that is used to enter the custom table parameters. |
| Item Parameters | This field is used to update the values. |
| Selection | This field is used to call up a screen that can be used to select the earning, deduction, or accumulators that will be summarized for this calculation code. |

Employee Accumulators

When the user selects Accumulator from the Employee Compensation menu the following screen will appear:



Insert

The Insert button allows the user to insert a new accumulator.

Additional

The Additional button allows the user to add an additional effective date range for an existing accumulator.

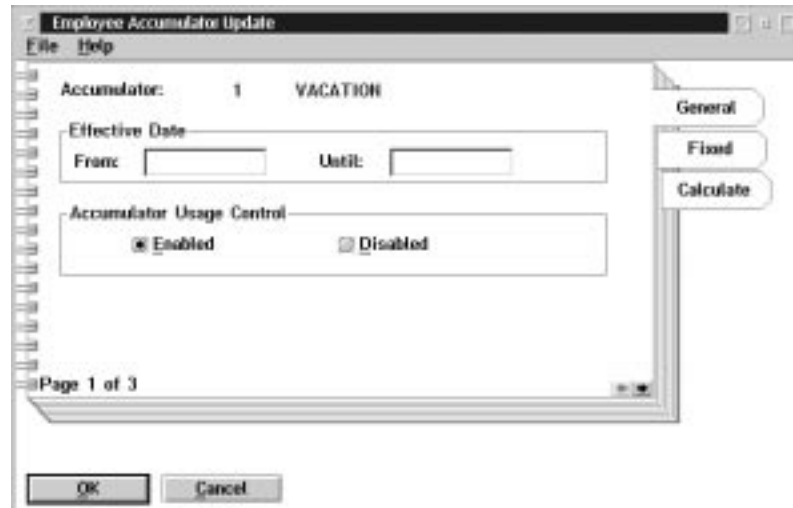
Update

The Update button allows the user to update an accumulator.

Delete

The Delete button allows the user to delete an accumulator.

When the user selects the update button from the Accumulator for the Employee screen the following screen will appear:

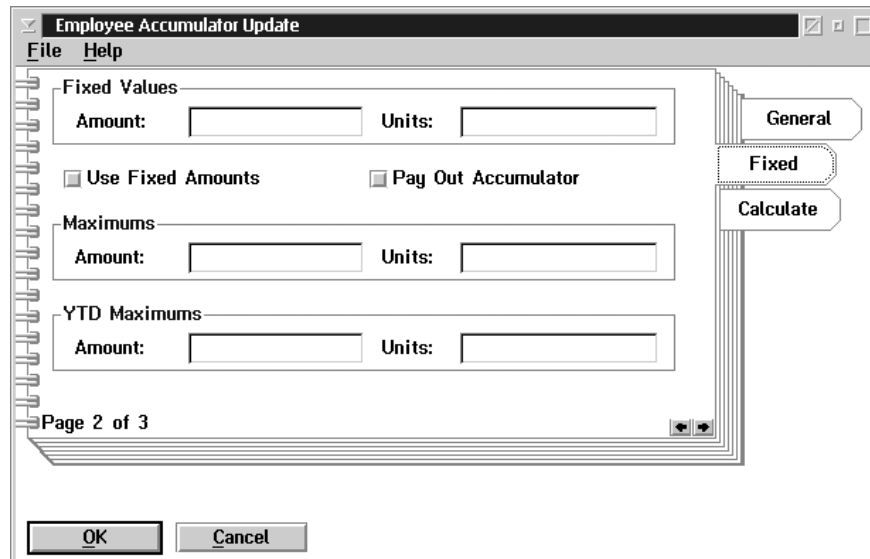


The GENERAL page contains fields for describing the accumulator and setting the effective date range of the accumulator type:

The following table gives a description of the data fields:

| Field | Description |
|----------------------------------|---|
| Accumulator | This field contains the code number of the accumulator. |
| From | This field is used to set the starting date of the effective date range for the accumulator. |
| Until | This field is used to set the end date of the effective date range for the accumulator. |
| Accumulator Usage Control | This field contains two buttons that are used to Enable or Disable the uses of the accumulator type. When the accumulator type is disabled the accumulator will not be used for pay processing. |

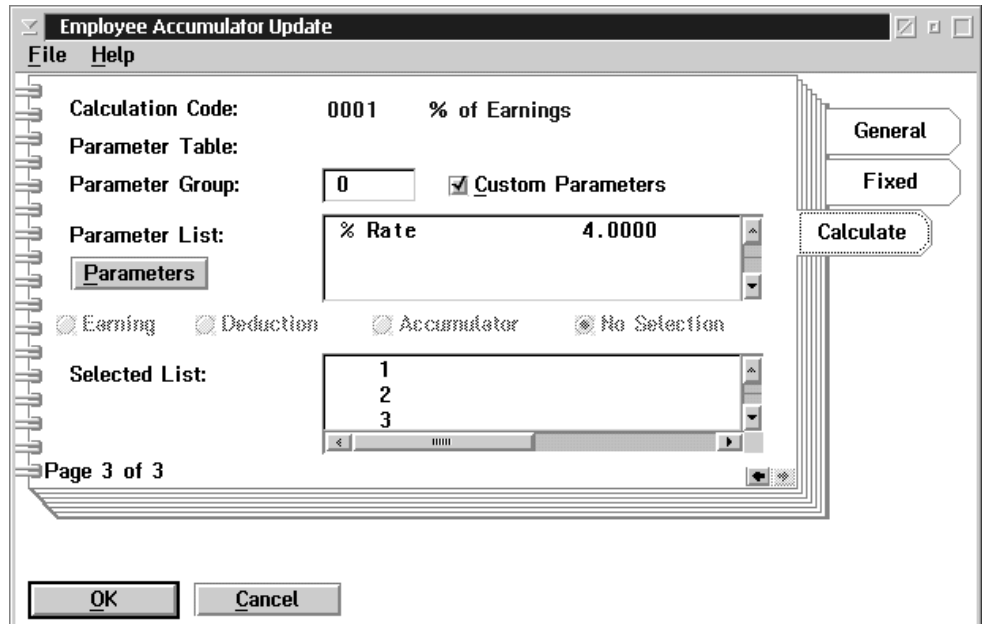
The Fixed page contains fields that are used to input fixed amounts for the accumulator processing. When fixed amounts are used the amounts given will be processed for each pay period. When you select the Fixed tab on the Accumulator Update the following screen will appear:



The following table gives a description of the data fields:

| Field | Description |
|---------------------------|--|
| Amount | This field contains the values that should be accumulated for an employee for each period. |
| Unit | This field contains the values that should be accumulated for an employee for each period. |
| Maximum | This field contains fields that can be used to restrict the maximum values that can be accumulated with the accumulator type. |
| Amount | This field restricts the amounts accumulated to the maximum value in the field. If the field contains zero (blank) the accumulator is not restricted to a maximum value. |
| Unit | This field restricts the units accumulated to the maximum value in the field. If the field contains zero (blank) the accumulator is not restricted to a maximum value. |
| Use Fixed Amounts | When this field is ticked the fixed value amounts will calculate at each pay period. |
| Payout Accumulator | When this field is ticked the accumulator will pay out after each calculation during each pay period. |

The Calculate page is used to set the values for the calculation that will be used to determine the amounts to be added to the deduction. When you select the Calculate tab on the Accumulator Update the following screen will appear:



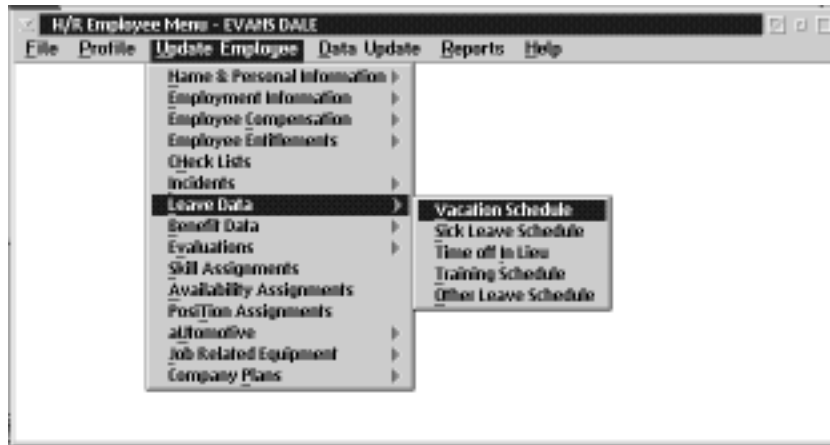
The following table gives a description of the data fields:

| Field | Description |
|--------------------------|---|
| Calculation Code | This field is used to enter the number of the calculation code that will be used it calculate the value to add to the accumulator. A list of calculation codes can be displayed by pressing the F8 key when the Calculation code field is selected. |
| Parameter Table | This field is used to enter the name of a parameter table. A list of the tables already defined can be obtained by pressing the F8 key when the Parameter field is selected. |
| Parameter Group | This field is used to enter the default group (row) for the deduction type. |
| Custom Parameters | This field is used to determine if a Named table or a Custom Parameter table will be used in the calculation for the deduction type. |
| Parameters | This field is used to call up a screen that is used to enter the custom parameters. |
| Selection List | This field is used to call up a screen that can be used to select the earnings, deductions or accumulators that will be summarized for this calculation code. |

Leave Reports

The Leave Data menu from the Employee menu bar is used to print Leave Data from the related data.

The Leave Data menu appears as follows:

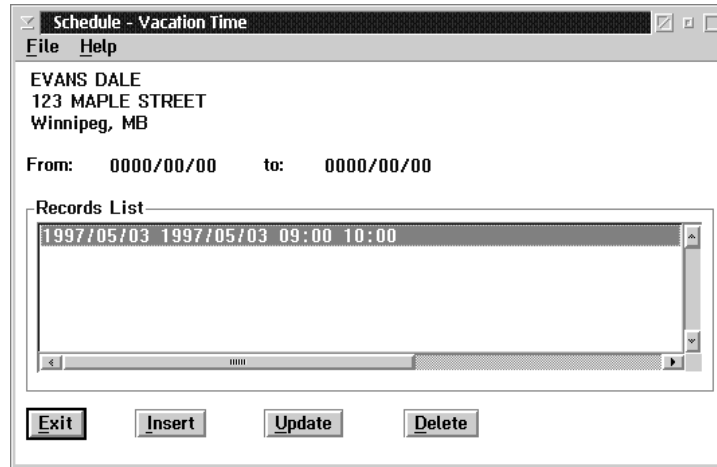


The Leave Data menu allows you to schedule the employee for the following schedules:

- Vacation
- Sick Leave
- Time of in Lieu
- Training
- Other Leave

Vacation Leave

When the **Vacation** option from the Leave Time sub menu is selected the following screen will appear:



The Schedule - Vacation Time dialog box contains the following data fields:

| Field | Description |
|----------------------------|---|
| From | The starting date of the date range is displayed in this field. |
| To | The ending date of the date range is displayed in this field. |
| Schedule Leave List | The list contains all the vacation leaves that have been scheduled within the date range. From left to right the list contains: starting date, ending date, starting time, ending time, and the employee. |

Set Date Range The **Set Date Range** option from the File menu will allow the user to change the date range.

Insert The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.

Additional The ADDITIONAL button, or the **Additional for Employee** option from the File menu will allow the user to enter another entry for the same employee selected by the selection bar. This saves the user the step of selecting the employee again.

Update The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.

Delete The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.

Esc (exit) The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

- Set Date Range** The **Set Date Range** option from the File menu will allow the user to change the date range.

- Insert** The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.

- Additional** The ADDITIONAL button, or the **Additional for Employee** option from the File menu will allow the user to enter another entry for the same employee selected by the selection bar. This saves the user the step of selecting the employee again.

- Update** The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.

- Delete** The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.

- Esc (exit)** The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

Sick Leave Entry

When a sick leave item is inserted or updated the following dialog box will appear:



The following table contains descriptions of the fields within the Sick Schedule Entry dialog box:

| Field | Description |
|-----------------|---|
| Employee | This field contains the employee currently being scheduled for leave. This field is for display only. |

| Field | Description |
|------------------------------|---|
| Replacement | The employee that will replace the employee on leave is entered into this data field. |
| Start Date | This field contains the starting date for the leave entry date range. |
| End Date | This field contains the ending date for the leave entry date range. When this field is not entered it is assumed to be identical to the start date. |
| Start Time | The starting time for the leave entry time range is entered into this field. When 'overlay processing only' is in effect this field may be zero. |
| Stop Time | The stopping time for the leave entry time range is entered into this field. When the 'overlay processing only' is in effect this field may be zero. |
| Type | This field is used to enter the user defined type code. A list of the defined codes can be generated by selecting the F8 key. The description of the type code will appear to the right of this field after a type has been selected. |
| Illness | This field is used to enter the user defined illness code. A list of the defined codes can be generated by selecting the F8 key. The description of the illness code will appear to the right of this field after an illness has been selected. |
| Overlay | The Overlay check box turns on the overlay option. |
| Description | This field is a free form multi-line text field that may be used for additional descriptive information. |
| Processed by Schedule | The Processed by schedule check box turns on the processed by schedule option. |
| Processed by Payroll | The Processed by payroll check box turns on the processed by payroll option. |

F8 (list)

The F8 key, or the **List** option in the File menu will bring up a list of available options relating to the field in which the cursor is placed. The only fields which will contain lists are: replacement, type and illness.

Save

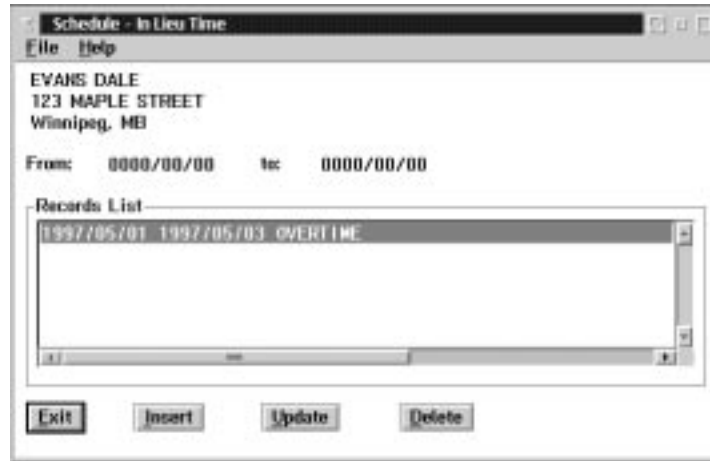
The OK button, or the **Save** option in the File menu will save any changes made in the dialog box.

Esc (exit)

The ESC key, the CANCEL button, or the **Exit** option from the File menu will exit the dialog box without saving any changes.

Time Off in Lieu

When the **Time Off in Lieu** option from the Leave Time sub menu is selected the following screen will appear:



The Schedule - In Lieu Time dialog box contains the following data fields:

| Field | Description |
|----------------------------|---|
| From | The starting date of the date range is displayed in this field. |
| To | The ending date of the date range is displayed in this field. |
| Schedule Items List | The list contains in lieu times that have been scheduled within the date range. From left to right the list contains: starting date, ending date, starting time, ending time, and the employee. |

Set Date Range The **Set Date Range** option from the File menu will allow the user to change the date range.

Insert The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.

Additional The ADDITIONAL button, or the **Additional for Employee** option from the File menu will allow the user to enter another entry for the same employee selected by the selection bar. This saves the user the step of selecting the employee again.

Update The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.

Delete The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.

Esc (exit) The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

Time Off in Lieu Leave Entry

When a time off in lieu leave item is inserted or updated the following dialog box will appear:



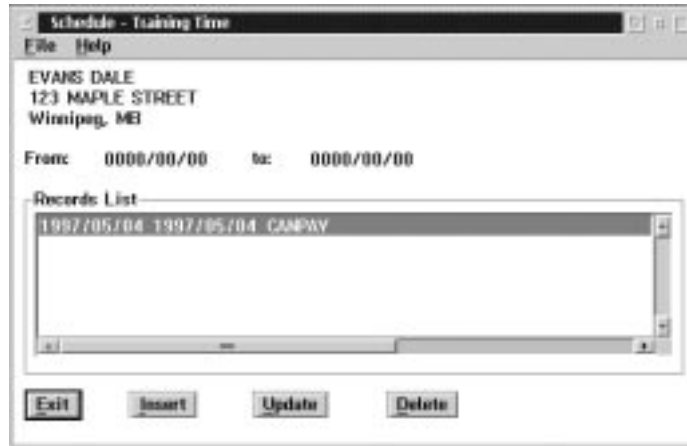
The following table contains descriptions of the fields within the Time Off in Lieu Schedule Entry dialog box:

| Field | Description |
|------------------------------|--|
| Employee | This field contains the employee currently being scheduled for leave. This field is for display only. |
| Replacement | The employee that will replace the employee on leave is entered into this data field. |
| Start Date | This field contains the starting date for the leave entry date range. |
| End Date | This field contains the ending date for the leave entry date range. When this field is not entered it is assumed to be identical to the start date. |
| Start Time | The starting time for the leave entry time range is entered into this field. When 'overlay processing only' is in effect this field may be zero. |
| Stop Time | The stopping time for the leave entry time range is entered into this field. When the 'overlay processing only' is in effect this field may be zero. |
| Reason | This field is a validated code entry from a reason table for the leave type. |
| Days | This field contains the days of the week that the leave entry may affect. This field is ignored for a one day date range. |
| Overlay | The Overlay check box turns on the overlay option. |
| Description | This field is a free form multi-line text field that may be used for additional descriptive information. |
| Processed by Schedule | The Processed by schedule check box turns on the processed by schedule option. |
| Processed by Payroll | The Processed by payroll check box turns on the processed by payroll option. |

- F8 (list)** The F8 key, or the **List** option in the File menu will bring up a list of available options relating to the field in which the cursor is placed. The only fields which will contain a list are: replacement and reason.
- Save** The OK button, or the **Save** option in the File menu will save any changes made in the dialog box.
- Esc (exit)** The ESC key, the CANCEL button, or the **Exit** option from the File menu will exit the dialog box without saving any changes.

Training

When the **Training** option from the Leave Time sub menu is selected the following screen will appear:



The Schedule - Training Time dialog box contains the following data fields:

| Field | Description |
|----------------------------|--|
| From | The starting date of the date range is displayed in this field. |
| To | The ending date of the date range is displayed in this field. |
| Schedule Items List | The list contains training times that have been scheduled within the date range. From left to right the list contains: starting date, ending date, starting time, ending time, and the employee. |

Set Date Range The **Set Date Range** option from the File menu will allow the user to change the date range.

Insert The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.

Additional The ADDITIONAL button, or the **Additional for Employee** option from the File menu will allow the user to enter another entry for the same employee selected by the selection bar. This saves the user the step of selecting the employee again.

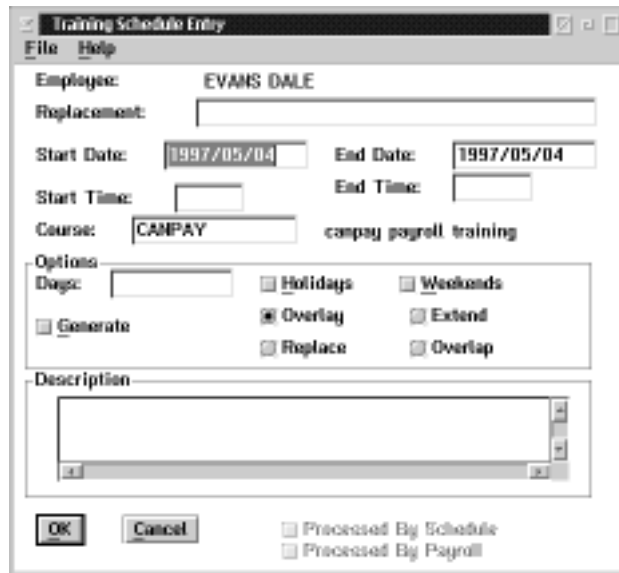
Update The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.

Delete The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.

Esc (exit) The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

Training Leave Entry

When a training leave item is inserted or updated the following dialog box will appear:



The following table contains descriptions of the fields within the Training Schedule Entry dialog box:

| Field | Description |
|--------------------|---|
| Employee | This field contains the employee currently being scheduled for leave. This field is for display only. |
| Replacement | The employee that will replace the employee on leave is entered into this data field. |
| Start Date | This field contains the starting date for the leave entry date range. |
| End Date | This field contains the ending date for the leave entry date range. When this field is not entered it is assumed to be identical to the start date. |
| Start Time | The starting time for the leave entry time range is entered into this field. When 'overlay processing only' is in effect this field may be zero. |
| Stop Time | The stopping time for the leave entry time range is entered into this field. When the 'overlay processing only' is in effect this field may be zero. |
| Course | This field is used to enter the user defined course code. A list of the defined codes can be generated by selecting the F8 key. The description of the course code will appear to the right of this field after a course has been selected. |
| Days | This field contains the days of the week that the leave entry may affect. This field is ignored for a one day date range. |
| Generate | The Generate check box turns on the segment generation option. |
| Holidays | The Holidays check box determines if the leave entry generation option is in effect for holidays registered in the system calendar. |
| Overlay | The Overlay check box turns on the overlay segment processing option. |
| Replace | The Replace check box turns on the replace segment processing option. |

| Field | Description |
|------------------------------|--|
| Weekends | The Weekends check box determines if the leave entry generation option is in effect for weekend days. |
| Extend | The Extend check box turns on the extend segment processing option. |
| Overlap | The Overlap check box turns on the overlap processing option. |
| Description | This field is a free form multi-line text field that may be used for additional descriptive information. |
| Processed by Schedule | The Processed by schedule check box turns on the processed by schedule option. |
| Processed by Payroll | The Processed by payroll check box turns on the processed by payroll option. |

F8 (list) The F8 key, or the **List** option in the File menu will bring up a list of available options relating to the field in which the cursor is placed. The only fields which will contain a list are: replacement and course.

Save The F10 key, OK button, or the **Save** option in the File menu will save any changes made in the dialog box.

Esc (exit) The ESC key, the CANCEL button, or the **Exit** option from the File menu will exit the dialog box without saving any changes.

Other Leave

When the **Other Leave** option from the Leave Time sub menu is selected the following screen will appear:



The Schedule - Other Leave Time dialog box contains the following data fields:

| Field | Description |
|----------------------------|--|
| From | The starting date of the date range is displayed in this field. |
| To | The ending date of the date range is displayed in this field. |
| Schedule Items List | The list contains other leaves that have been scheduled within the date range. From left to right the list contains: starting date, ending date, starting time, ending time, and the employee. |

Set Date Range The **Set Date Range** option from the File menu will allow the user to change the date range.

Insert The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.

Additional The ADDITIONAL button, or the **Additional for Employee** option from the File menu will allow the user to enter another entry for the same employee selected by the selection bar. This saves the user the step of selecting the employee again.

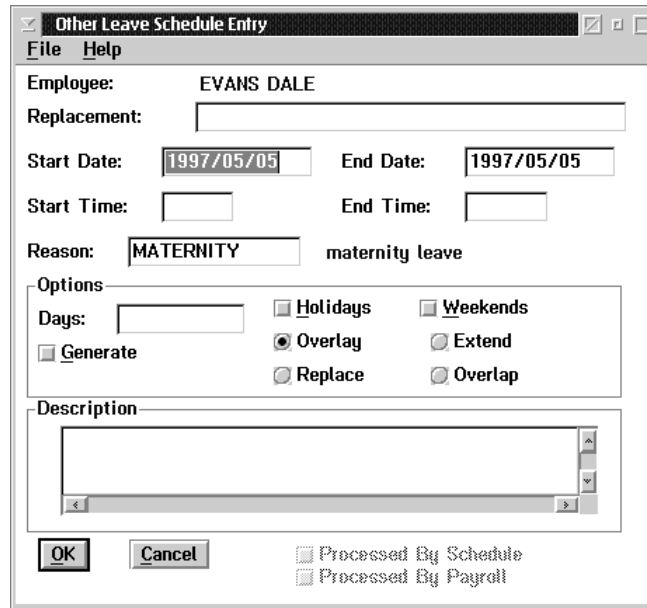
Update The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.

Delete The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.

Esc (exit) The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

Other Leave Entry

When an other leave item is inserted or updated the following dialog box will appear:



The following table contains descriptions of the fields within the Other Leave Schedule Entry dialog box:

| Field | Description |
|--------------------|---|
| Employee | This field contains the employee currently being scheduled for leave. This field is for display only. |
| Replacement | The employee that will replace the employee on leave is entered into this data field. |
| Start Date | This field contains the starting date for the leave entry date range. |
| End Date | This field contains the ending date for the leave entry date range. When this field is not entered it is assumed to be identical to the start date. |
| Start Time | The starting time for the leave entry time range is entered into this field. When 'overlay processing only' is in effect this field may be zero. |
| Stop Time | The stopping time for the leave entry time range is entered into this field. When the 'overlay processing only' is in effect this field may be zero. |
| Reason | This field is used to enter the user defined reason code. A list of the defined codes can be generated by selecting the F8 key. The description of the reason code will appear to the right of this field after a reason has been selected. |
| Days | This field contains the days of the week that the leave entry may affect. This field is ignored for a one day date range. |
| Generate | The Generate check box turns on the segment generation option. |
| Holidays | The Holidays check box determines if the leave entry generation option is in effect for holidays registered in the system calendar. |
| Overlay | The Overlay check box turns on the overlay segment processing option. |

| Field | Description |
|------------------------------|--|
| Replace | The Replace check box turns on the replace segment processing option. |
| Weekends | The Weekends check box determines if the leave entry generation option is in effect for weekend days. |
| Extend | The Extend check box turns on the extend segment processing option. |
| Overlap | The Overlap check box turns on the overlap processing option. |
| Processed by Schedule | The Processed by schedule check box turns on the processed by schedule option. |
| Processed by Payroll | The Processed by payroll check box turns on the processed by payroll option. |
| Description | This field is a free from multi-line text field that may be used for additional descriptive information. |

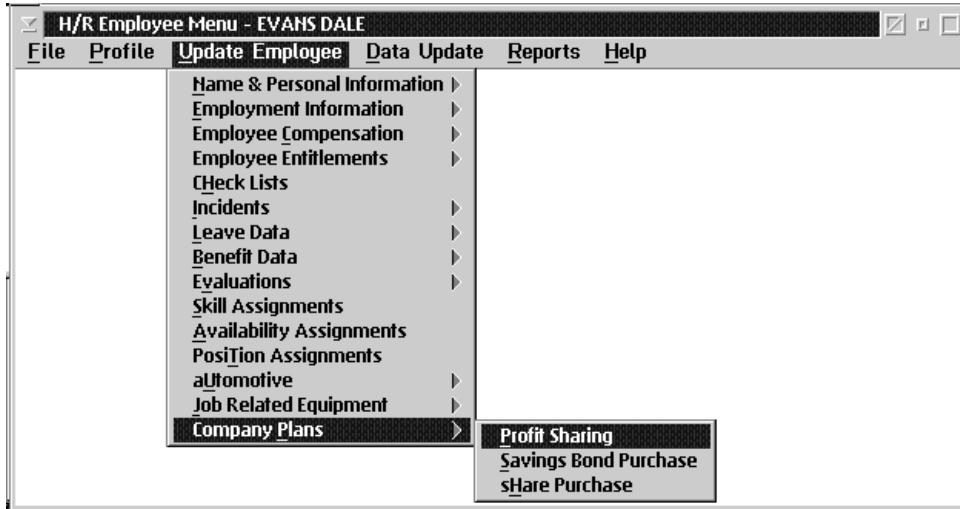
F8 (list) The F8 key, or the **List** option in the File menu will bring up a list of available options relating to the field in which the cursor is placed. The only fields which will contain a list are: replacement and reason.

Save The OK button, or the **Save** option in the File menu will save any changes made in the dialog box.

Esc (exit) The ESC key, the CANCEL button, or the **Exit** option from the File menu will exit the dialog box without saving any changes.

Company Plans

The following sub menu will appear when the Company Plans option is selected:



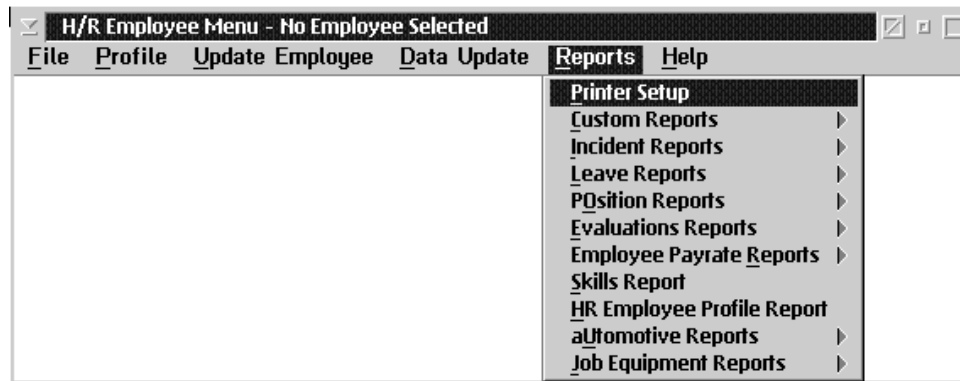
The company plans available to the user are:

- Profit Sharing
- Saving Bond Purchase
- Share Purchase

Reports

The reports menu from the Employee menu bar is used to print reports containing the data from the GrandMaster Suite Human Resource System.

The reports menu appears as follows:



The report generation process will only include those employees that are part of the current employee group.

The date range entered limits the range of the report to only those records that fall within the selected date range.

The Human Resource Module provides two classes of reports, system defined reports, and custom reports.

Custom Reports are discussed in the section on custom reports definition and generation.

System defined reports have a standard format. The data field included in the report may be modified by the user to eliminate any that are not being used.

Printers

Please refer to page 3-7 for more information on printers.

Incident Reports

The Incident Reports menu from the Reports menu bar is used to print incident reports from the Incident data.

Please refer to page 245 for more information on Incident Reports.

Accident Report

The **Accident Report** option presents a listing of the accident incidents for each employee.

Please refer to page 246 for more information on Accident Reports.

Human Rights Report

The **Human Rights Report** option presents a listing of the human rights incidents for each employee.

Please refer to page 249 for more information on Human Rights Report.

Labour Board Report

The **Labour Board Report** option presents a listing of the labour board incidents for each employee.

Please refer to page 252 for more information on Labour Board Reports.

Union Grievances Report

The **Union Grievances Report** option presents a listing of the union grievances incidents for each employee.

Please refer to page 255 for more information on Union Grievances Reports.

Other Incidents Report

The **Other Incident Report** option presents a listing of the other incidents for each employee.

Please refer to page 258 for more information on Other Incident Reports.

Leave Reports

Please refer to page 261 for more information on Leave Reports.

Vacation Report

Please refer to page 262 for more information on Vacation Reports

Sick Leave Report

The **Sick Leave Report** option prints a listing of the sick leave reasons for each employee.

Please refer to page 265 for more information on Sick Leave Reports.

Training Report

The **Training Report** option prints a listing of the training reasons for each employee.

Please refer to page 269 for more information on Training Reports.

In Lieu Report

The **In Lieu Report** option prints a listing of the in lieu reasons for each employee.

Please refer to page 272 for more information on In Lieu Reports.

Other Leave Report

The **Other Leave Report** option prints a listing of the other leave reasons for each employee.

Please refer to page 275 for more information on Other Leave Reports.

All Leave Report

The **All Leave Report** option prints a listing of the All Leave reasons for each employee.

Please refer to page 278 for more information on All Leave Reports.

Position Assignments

The **Position Assignments** option prints a listing of positions for each employee.

Please refer to page 296 for more information on Position Assignments.

Evaluations

Please refer to page 305 for more information on Evaluation Reports.

Evaluations Required

The **Evaluations Required** option presents a listing of required evaluation for each employee.

Please refer to page 306 for more information on Evaluations Required

Evaluations Completed

The **Evaluation Completed Report** option presents a listing of other completed evaluations for each employee.

Please refer to page 309 for more information on Evaluations Completed.

Skills Report

The **Skills Report** option prints a listing of the skills for each employee.
Please refer to page 312 for more information on Skills Reports.

Employee Profile Report

Please refer to page 322-330 for more information on Employee Profile Reports.

Automotive Reports

Please refer to page 331 for more information on Automotive Reports.

Parking Report

The **Parking Report** option presents a listing of other parking assignments for each employee.
Please refer to page 332 for more information on Parking Reports.

Vehicle Assignment Report

The **Vehicle Assignment Report** option presents a listing of vehicle assignments for each employee.
Please refer to page 335 for more information on Vehicle Assignment Reports.

Job Equipment Reports

Please refer to page 338 for more information on Job Equipment Reports.

Toolkits Report

The **Toolkits Report** option presents a listing of the tool kits for each employee.

Please refer to page 339 for more information on Toolkit Reports.

Safety Equipment Report

The **Safety Equipment Report** option presents a listing of the safety equipment for each employee.

Please refer to page 342 for more information on Safety Equipment Reports.

Other Equipment Report

The Other Equipment Report option presents a listing of other equipment assignments for each employee.

Please refer to page 345 for more information on Other Equipment Reports.

Check Lists

The **Checklist** option from the employee menu allows you to add or update check list information.

A Check List is defined using the checklist definition function. These lists are used to define a set of incident types that are reported as a collection of incidents.

A list of all the check lists items that have all ready been set up will be displayed. You may select a date range to limit the checklist information.

The checklist screen appears as follows:



The following table gives a description of the data fields:

| Field | Description |
|------------------|--|
| From | This field is the starting date range of the checklist. |
| To | This field is the ending date range of the checklist. |
| Checklist | This field will display a list of items on file as checklists. |

INSERT The INSERT button allows you to insert a new checklist.

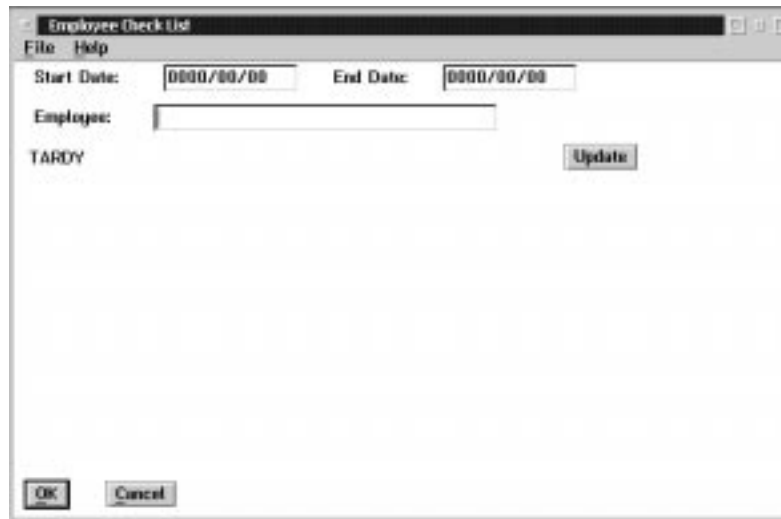
ADDITIONAL The ADDITIONAL button allows you to add an additional checklist.

UPDATE The UPDATE button allows you update an existing checklist.

DELETE The DELETE button allows you to delete an existing checklist.

EXIT The EXIT button allows you to exit the checklist.

When you are updating employees to the checklist the following screen will be shown:



The following table gives a description of the data fields:

| Field | Description |
|-------------------|--|
| Start Date | This field is the starting date of the checklist item. |
| End Date | This field is the ending date of the checklist item. |
| Employee | You may enter an employee's name to be updated to the checklist. |

When you have selected update on the desired checklist the screen will be displayed.

Each incident type defined in the check list beside the name of the incident type the date of the most recent incident appears and the total number of that type of incident on file.

Update

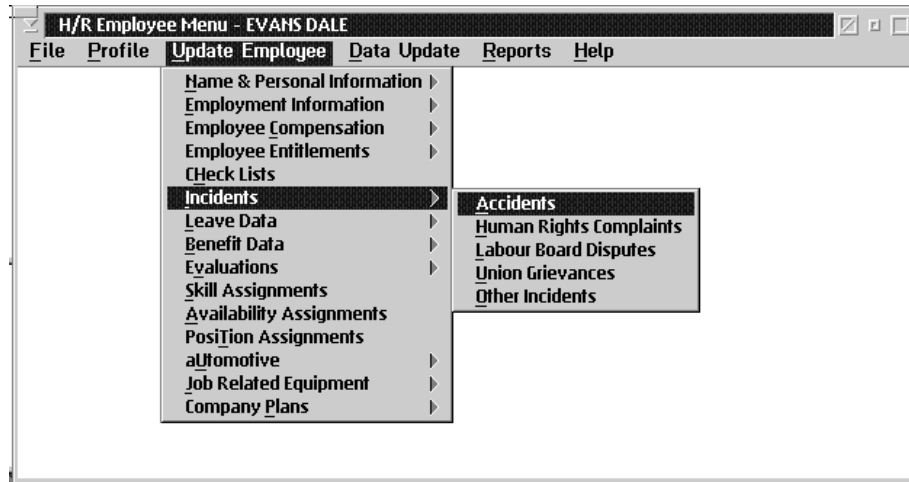
The Update button can be used to update the list of incidents for the incident type.

Incidents

The Incidents sub menu from the Employee menu is used to print incidents from the related data.

An incident can be anything that happens to an employee or any document filed for an employee.

The Incident Sub menu appears as follows:



EMPLOYEE
INFORMATION

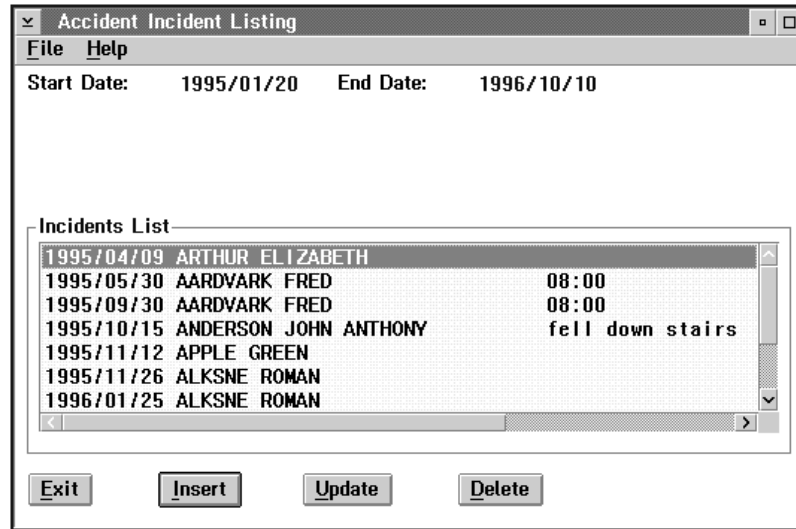
The Incidents sub menu allows for record keeping of the following:

- Accidents
- Human Rights Complaints
- Labour Board Disputes
- Union Grievances
- Other Incidents

Accidents

The **Accidents** option allows the user to keep track of accidents in the work place.

The following dialog box will appear when this option is selected:



The dialog box contains the following data fields:

| Field | Description |
|----------------------|--|
| Start Date | This field contains the starting date of the date range. Only accidents occurring after the start date will appear in the list. |
| End Date | This field contains the ending date of the date range. Only accidents occurring before the end date will appear in the list. |
| Incident List | The list contains all the accidents within the date range selected. Each accident may list from left to right: the date of the accident, the employee name, start time, and description of the accident. |

Date Range

The **Date Range** option in the File menu allows the user to change the date range of the incident list. Only the incidents that fall within the date range will appear in the incident list. The date range can be set to zero to include all incidents on record.

Insert

The INSERT button allows the user to insert a new accident incident.

Update

The UPDATE button allows the user to update the accident currently selected by the selection bar.

Delete

The DELETE button allows the user to delete the accident currently selected by the selection bar.

Esc (exit)

The ESC key, EXIT button, or **Exit** option in the File menu will exit the dialog box.

When the user selects one of the listed entries, by double clicking on the highlighted item or pressing the insert button, the Accident Incident Entry will appear as follows:

The screen requests the entry of the following data fields:

| Field | Description |
|----------------------|--|
| Employee | This field contains the employee name for the Accident Entry. |
| Date | This field contains the date of the Accident Entry. |
| Time | This field contains the starting and ending time of the Accident Entry. |
| Type | This field contains the type of accident for the Accident Entry. |
| Area | This fields contains the area of the Accident Incident Entry. |
| Activity | This field contains the activity being performed at the time of the Accident Incident Entry. |
| Claim | This field contains the claim number for the Accident Incident Entry. |
| Direct Cost | This field contains the direct cost of the Accident Entry. |
| Indirect Cost | This field contains the indirect cost of the Accident Entry. |
| Description | This field contains the description of the Accident Entry. |

F8(List)

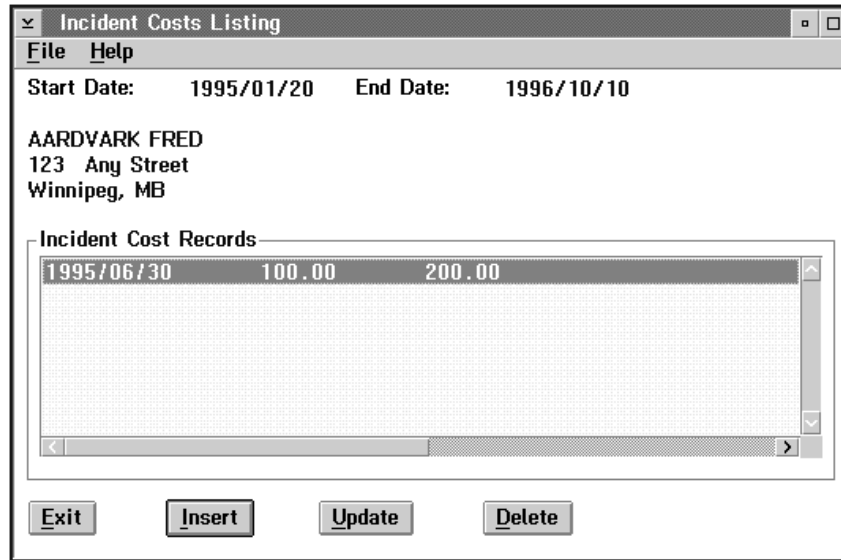
When the F8 key, or List option from the menu is pressed a list of the options for the field where the cursor is placed will appear. This function will allow you to insert, update or delete an incident entry.

Save

To save any changes made select the **Save** option from the File menu. The OK button, will have the same effect.

Esc (exit) To exit the screen without saving any changes select the **Exit** function from the File menu. The CANCEL button, or the ESC key will have the same effect.

Detail Cost When the user selects the DETAIL COST button the screen will appear as follows:



The screen requests the entry of the following data fields:

| Field | Description |
|------------------------------|---|
| Start Date | This field contains the starting date of the incident cost listing. |
| End Date | This field contains the ending date of the incident cost listing. |
| Employee | This field contains the employee name of the incident cost listing. |
| Incident Cost Records | This field contains the costs of the Incident Cost Listing. |

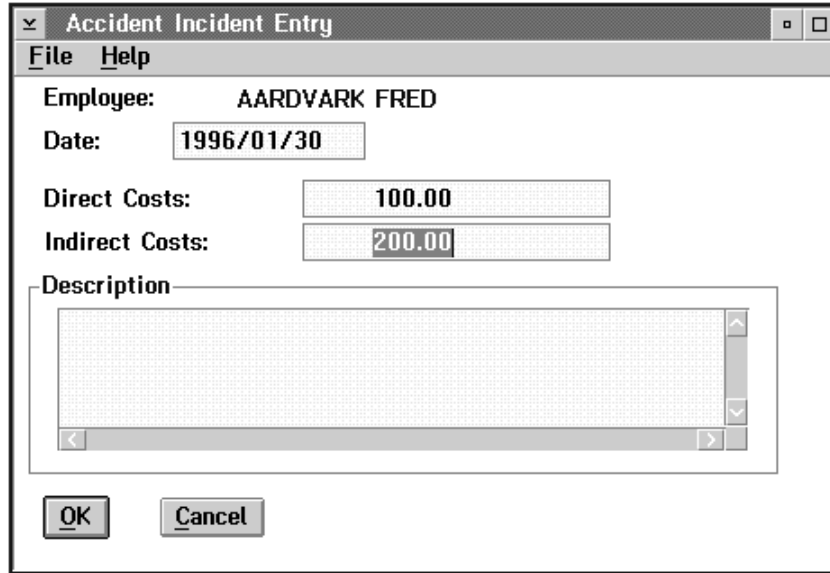
Insert The INSERT button allows the user to insert an incident costs listing

Update The UPDATE button allows the user to update an incident costs listing

Delete The DELETE button allows the user to delete an incident costs listing

Esc (exit) To exit the screen without saving any changes select the **Exit** function from the File menu. The CANCEL button, or the ESC key will have the same effect.

When the user selects the UPDATE button of the Incident Costs listing screen the following screen will appear:



The screen requests the entry of the following data fields:

| Field | Description |
|----------------------|---|
| Employee | This field contains the name f the employee involved in the accident. |
| Date | This field contains the date of the Accident Entry. |
| Direct Cost | This field contains the direct cost of the Accident Entry. |
| Indirect Cost | This field contains the indirect cost of the Accident Entry. |
| Description | This field contains the description of the Accident Entry. |

F8(List) When the F8 key, or the **List** option from the menu is pressed a list of the options for the field where the cursor is placed will appear. This function will allow you to insert, update, or delete an incident entry.

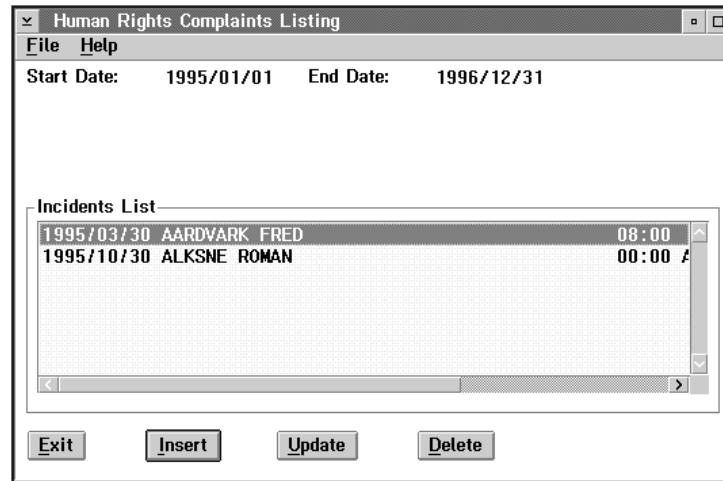
Save To save any changes made select the **Save** option from the File menu. The OK button. will have the same effect.

Esc (Exit) To exit the screen without saving any changes select the **Exit** function from the File menu. The CANCEL button, or the ESC key will have the same effect.

Human Rights Complaints

The **Human Rights** option allows the user to keep track of the human rights complaints in the work place.

The Human Rights complaints screen appears as follows:



The screen displays the following data fields:

| Field | Description |
|----------------------|---|
| Start Date | This field contains the starting date of the date range. Only human rights complaints occurring after the start date will appear in the list. |
| End Date | This field contains the ending date of the date range. Only human rights complaints occurring before the end date will appear in the list. |
| Incident List | The list contains all the human rights complaints within the date range selected. Each complaint may list from left to right: the date of the complaint, the employee name, start time, and description of the complaint. |

Date Range

The **Date Range** option in the File menu allows the user to change the date range of the incident list. Only the incidents that fall within the date range will appear in the incident list. The date range can be set to zero to include all incidents on record.

Insert

The INSERT button allows the user to insert human rights complaints listing

Update

The UPDATE button allows the user to update human rights complaints listing

Delete

The DELETE button allows the user to delete human rights complaints listing

Esc (exit)

To exit the screen without saving any changes select the **Exit** function from the File menu. The CANCEL button, or the ESC key will have the same effect.

When the user selects one of the list entries the Human Rights incident entry will appear:

The screen requests the entry of the following data fields:

| Field | Description |
|--------------------|---|
| Employee | This field contains the employee name of the incident entry. |
| Start Date | This field contains the starting date of the incident entry. |
| End Date | This field contains the ending date of the incident entry. |
| Start Time | This field contains the starting time of the incident entry. |
| End Time | This field contains the ending time of the incident entry. |
| Reason | This field contains the reason for the Human Rights Incident Entry. |
| Description | This field contains the description of the Human Rights Incident Entry. |

F8(List)

When the F8 key or, the **List** option from the menu is pressed a list of the options for the field where the cursor is placed will appear. This function will allow you to insert, update or delete an incident entry.

Save

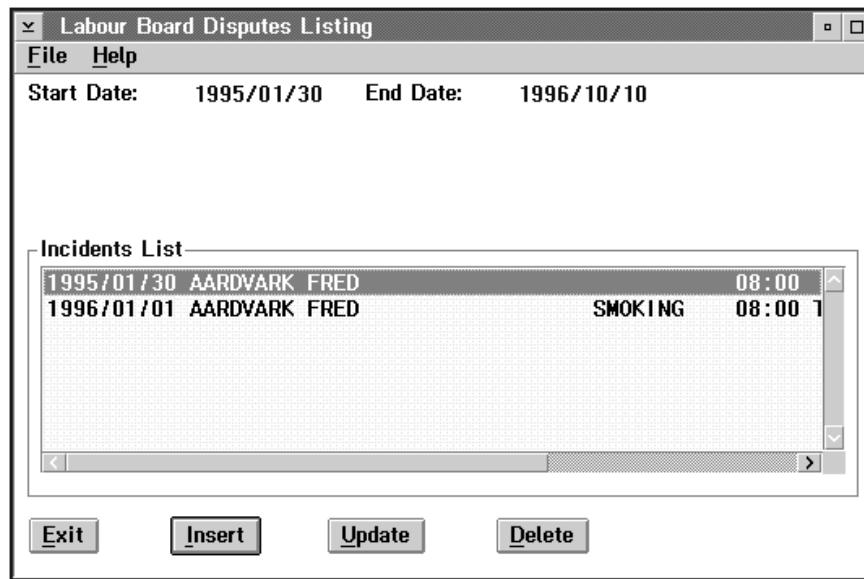
To save any changes made select the **Save** option from the File menu. The OK button, will have the same effect.

Esc(Exit)

To exit the screen without saving any changes select the **Exit** function from the File menu. The CANCEL button or ESC key will have the same effect.

Labour Board Disputes

The Labour Board Disputes appears as follows:

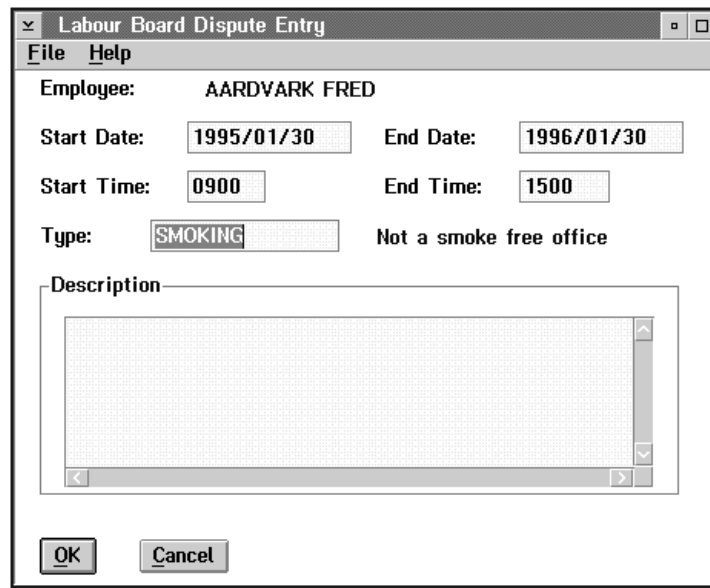


The screen displays the following data fields:

| Field | Description |
|----------------------|--|
| Start Date | This field contains the starting date for the disputes listing. |
| End Date | This field contains the ending date for the disputes listing. |
| Incident List | The list contains all the incidents within the date range that have been previously defined. |

- Date Range** The **Date Range** option in the File menu allows the user to change the date range of the incident list. Only the incidents that fall within the date range will appear in the incident list. The date range can be set to zero to include all incidents on record.
- Insert** The INSERT button allows the user to insert labour board disputes listing
- Update** The UPDATE button allows the user to update labour board disputes listing
- Delete** The DELETE button allows the user to delete labour board disputes listing
- Esc (exit)** To exit the screen without saving any changes select the **Exit** function from the File menu. The CANCEL button, or the ESC key will have the same effect.

When the user selects the list entries the labour board dispute entry screen will appear:



The screen requests the entry of the following data fields:

| Field | Description |
|--------------------|--|
| Employee | This field contains the employee name for the dispute entry. |
| Start Date | This field contains the starting date for the dispute entry. |
| End Date | This field contains the ending date for the dispute entry. |
| Start Time | This field contains the starting time for the dispute entry. |
| End Time | This field contains the ending time for the dispute entry. |
| Type | This field contains the type of dispute for the dispute entry. |
| Description | This field contains the description of the dispute entry. |

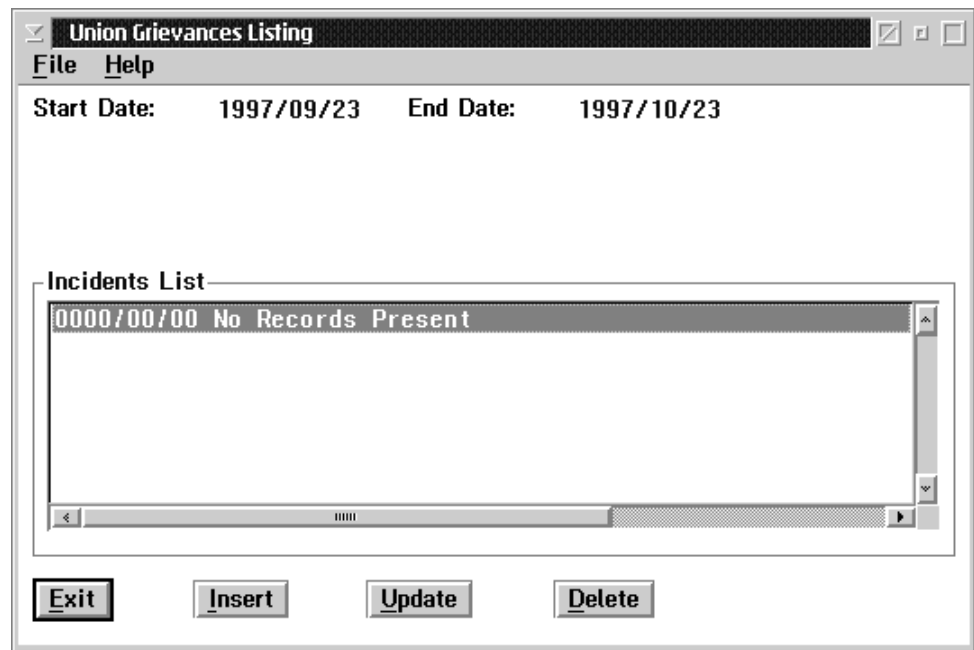
- F8(List)** When the **List** option from the menu is pressed a list of the options for the field where the cursor is placed will appear. This function will allow you to insert, update or delete an incident entry.

- F10(Save)** To save any changes made select the **Save** option from the File menu. The OK button, or F10 key will have the same effect.

- Esc(Exit)** To exit the screen without saving any changes select the **Exit** function from the File menu. The CANCEL button, or ESC key will have the same effect.

Union Grievances

The Union Grievances screen appears as follows:



The screen displays the following data fields:

| Field | Description |
|----------------------|---|
| Start Date | This field contains the starting date of the union grievance entry. |
| End Date | This field contains the ending date of the union grievance entry. |
| Incident List | This field contains all union grievances incidents within the date range selected. Each union grievance may list etc. |

Date Range

The **Date Range** option in the File menu allows the user to change the date range of the incident list. Only the incidents that fall within the date range will appear in the incident list. The date range can be set to zero to include all incidents on record.

Insert

The INSERT button allows the user to insert the union grievance entry

Update

The UPDATE button allows the user to update the union grievance entry

Delete

The DELETE button allows the user to delete the union grievance entry

Esc (exit)

To exit the screen without saving any changes select the **Exit** function from the File menu. The CANCEL button, or the ESC key will have the same effect.

When the user selects one of the list entries the union grievance entry screen will appear as follows:

The screen requests the entry of the following data fields:

| Field | Description |
|--------------------|--|
| Employee | This field contains the employee name of the union grievance entry. |
| Start Date | This field contains the starting date for the union grievance entry. |
| End Date | This field contains the ending date for the union grievance entry. |
| Start Time | This field contains the starting time for the union grievance entry. |
| End Time | This field contains the ending time for the union grievance entry. |
| Reason | This field contains the reason for the union grievance entry. |
| Description | This field contains the description of the union grievance entry. |

F8(List)

When the F8 key, or the **List** option from the menu is pressed a list of the options for the field where the cursor is placed will appear. This function will allow you to insert, update or delete an incident entry.

F10(Save)

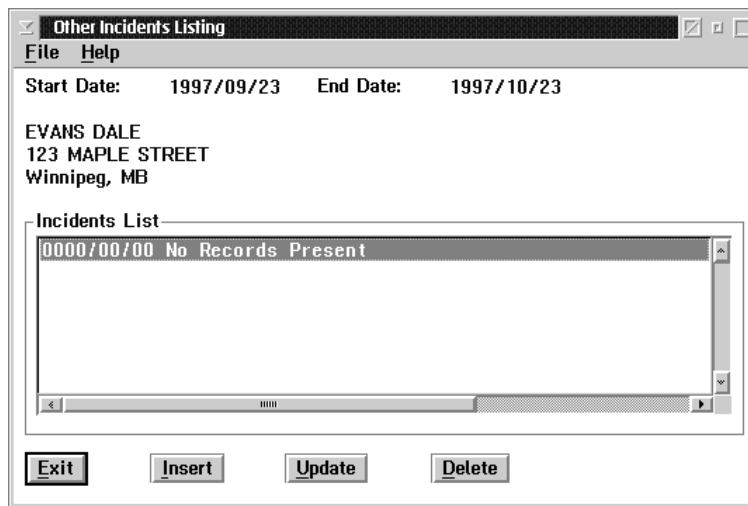
To save any changes made select the **Save** option from the File menu . The OK button, or the F10 key will have the same effect.

ESC(Exit)

To exit the screen without saving any changes select the **Exit** function from the File menu. The CANCEL button will have the same effect.

Other Incidents

The Other Incidents screen appears as follows:



The screen displays the following data fields:

| Field | Description |
|----------------------|--|
| Start Date | This field contains the starting date for the other incident listing. |
| End Date | This field contains the ending date for the other incident listing. |
| Incident List | The list contains all the incidents within the date range that have been previously defined. |

F8(List)

When the F8 key, or **the** List option from the menu is pressed a list of the options for the field where the cursor is placed will appear. This function will allow you to insert, update or delete an incident entry.

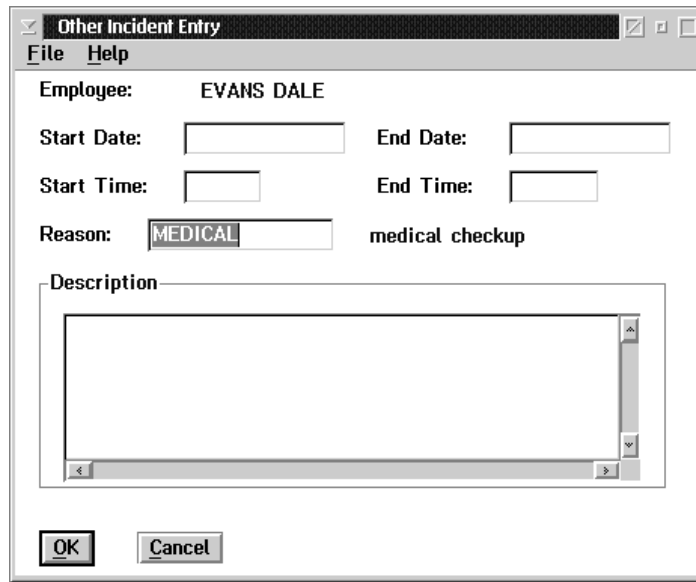
Save

To Save any changes made select the **Save** option from the File menu. The OK button, will have the same effect.

Exit

To exit the screen without saving any changes select the **Exit** function from the File menu. The CANCEL button will have the same effect.

When the user selects one of the list entries the screen will appear as follows:



The screen requests the entry of the following data fields:

| Field | Description |
|--------------------|---|
| Employee | This field contains the employee name for the other incident entry. |
| Start Date | This field contains the starting date for the other incident entry. |
| End Date | This field contains the ending date for the other incident entry. |
| Start Time | This field contains the starting time for the other incident entry. |
| End Time | This field contains the ending time for the other incident entry. |
| Reason | This field contains the reason for the other incident entry. |
| Description | This field contains the description for the other incident entry. |

Date Range

The **Date Range** option in the File menu allows the user to change the date range of the incident list. Only the incidents that fall within the date range will appear in the incident list. The date range can be set to zero to include all incidents on record.

Insert

The INSERT button allows the user to insert the other incident entry

Update

The UPDATE button allows the user to update the other incident entry

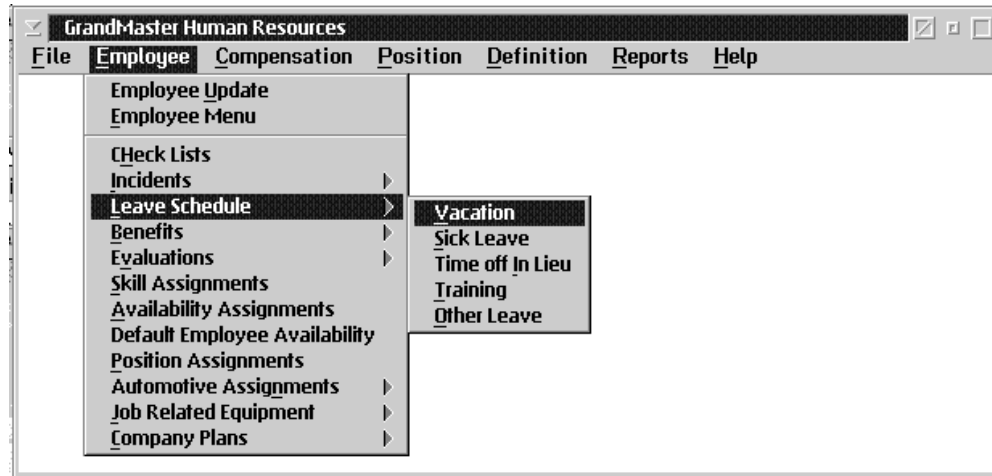
Delete

The DELETE button allows the user to delete the other incident entry

When the user selects one of the list entries the screen will appear as follows:

Leave Schedule

The **Leave Schedule** option contains the following sub menu:



The **Leave Data** option supports five major divisions of leave time:

- vacation
- sick leave
- time off in lieu
- training
- other leave

Each major type of leave time has an associated set of **reason codes**. The reason codes are used to describe the purpose for the leave time. The system user may define any number of reason codes for each type of leave.

Each major type of leave may have an associated **payroll earning code** that is used to allocate the time granted for the leave. This earning code is normally associated with a payroll accumulator that is used to track the employee's entitlement for the leave time.

When leave time is scheduled for an employee that is assigned to a standard shift rotation, the standard shift assignments in the date range scheduled for leave for that employee are replaced by the system defined shift code for the leave type.



For the standard shift assignments to be replaced by the system defined shift code it is required that no start and stop times are assigned for the leave schedule.

Example: Fred Johns works the following rotation:

| | | | | | | | | | | |
|-------|-----|-----|---|---|-------|-------|-------|---|----|---------|
| Jan 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| DAY | DAY | DAY | | | NIGHT | NIGHT | NIGHT | | | EVENING |

When Vacation is scheduled for Jan. 2 through Jan. 7 inclusive, the six days vacation time span would have an affect on only the four standard work days in the date range requested for vacation therefore the shift assignments would become:

| | | | | | | | | | | |
|-------|-------|-------|---|---|-------|-------|-------|---|----|---------|
| Jan 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| DAY | \$VAC | \$VAC | | | \$VAC | \$VAC | NIGHT | | | EVENING |

All leave types may have a date range and a start and stop time. When the date range contains more than one day the same start and stop time are assigned for each day.

Example: Time off in lieu - July 4 through July 7

Start Time - 13:00 Stop Time- 17:00

Would result in 4 hours time off allocated for each of the days in the range for a total of 16 hours.

Leave schedule with a start and stop time will partially replace work shift assignments. When a work shift assignment is not present for a date in the range no leave time assignment is made for that day.

When leave time is scheduled for an employee who does not work a scheduled position the payroll system uses the scheduled date range to assign vacation days in place the employee's standard work days.

Example: Sharon Silver works Monday thru Friday each week except Statutory holidays.

Vacation days - June 26, 1995 thru July 14, 1995

Statutory holiday - July 1, 1995

This results in 14 days vacation taken and 1 statutory holiday.

Leave Time Processing

When Leave Time is entered for an employee that is scheduled, the system will update the work time segments to reflect the Leave Time Entry. Leave Time Entries provide several processing options. These options control the way that the Leave Time Entry segments substitute for existing work segments.

- **Generate** - This option causes the Leave Time Entry to generate new Leave segments on days that do not have an existing work segment. The new segment uses the Leave Entry start and stop times.
- **Overlay** - This option causes the Leave Time Entry to overlay only existing work time segments using the work segment start and stop times.
- **Replace** - This option causes the Leave Time Entry to replace work segments with a leave segment that uses the Leave Entry start and stop times.
- **Extend** - This option causes the Leave Time Entry to extend existing work segments to the Leave Entry start and stop times. Overlapping time periods are overlaid with the Leave Entry.
- **Overlap** - This option causes the time entry generation to insert new segments that overlap existing work segments. The existing work segment is not affected by the new segment.

The **generate** option may be combined with any one of the other four options.

The **overlay, replace, overlap,** and **extend** options are mutually exclusive.



The default of Leave Processing is the **overlay** option.

When the Leave Time Entry is a portion of a work time segment will be split into two or three segments to reflect the Leave Time Entry. If the Leave Time Entry is subsequently modified the work segment split will be restored to the original.

Example:

Original:

| | | | |
|-----------------|------------|-------|-------|
| Work Segment | 1995/05/04 | 8:00 | 16:00 |
| Sick Leave Time | 1995/05/04 | 12:00 | 14:00 |

Will result in:

| | | | |
|--------------|------------|-------|-------|
| Work Segment | 1995/05/04 | 8:00 | 12:00 |
| Sick Segment | 1995/05/04 | 12:00 | 14:00 |
| Work Segment | 1995/05/04 | 14:00 | 16:00 |

When a Leave Time Entry is made with only a starting time specified the system will replace all work time segments after that time with Leave Time segments. If the Leave Time Entry specifies a date range, the same starting time will be used for each day in the date range.

Example:

| | | | |
|------------------------|--------------------------|------|-------|
| Original Work Segments | 1995/05/04 | 8:00 | 16:00 |
| | 1995/05/05 | 8:00 | 16:00 |
| | 1995/05/06 | 8:00 | 16:00 |
| | 1995/05/07 | 8:00 | 16:00 |
| In Lieu Time | 1995/05/04 to 1995/05/06 | | 12:00 |

Will result in:

| | | | |
|---------|------------|-------|-------|
| Work | 1995/05/04 | 8:00 | 12:00 |
| In Lieu | 1995/05/04 | 12:00 | 16:00 |
| Work | 1995/05/05 | 8:00 | 12:00 |
| In Lieu | 1995/05/05 | 12:00 | 16:00 |
| Work | 1995/05/06 | 8:00 | 12:00 |
| In Lieu | 1995/05/06 | 12:00 | 16:00 |
| Work | 1995/05/07 | 8:00 | 16:00 |

A Leave Time Entry may optionally generate new schedule entries and replace existing work segment entries.

Example:

| | | | |
|-------------------------------------|--------------------------|------|-------|
| Original Work Segments | 1995/05/08 | 8:00 | 16:00 |
| | 1995/05/10 | 8:00 | 16:00 |
| Training Entry with Generate Option | 1995/05/08 to 1995/05/11 | 8:30 | 15:00 |

Will result in:

| | | | |
|----------|------------|------|-------|
| Training | 1995/05/08 | 8:30 | 15:00 |
| | 1995/05/09 | 8:30 | 15:00 |
| | 1995/05/10 | 8:30 | 15:00 |
| | 1995/05/11 | 8:30 | 15:00 |

A Leave Time Entry may optionally replace existing work segments with a Leave Time Segment. The Leave Time segment will use the start and stop time for the Leave Time entry only, rather than overlaying a portion of the work time segment.

Example:

| | | | |
|------------------------|--------------------------|------|-------|
| Original Work Segments | 1995/05/15 | 8:00 | 16:00 |
| | 1995/05/17 | 8:00 | 16:00 |
| Leave Time Entry | 1995/05/14 to 1995/05/18 | 9:00 | 15:00 |

Will result in:

| | | | |
|-------|------------|------|-------|
| Leave | 1995/05/15 | 8:00 | 15:00 |
| | 1995/05/17 | 9:00 | 15:00 |

A Leave Time Entry may optionally generate new Leave Time segments and extend existing work time segments. The new time segments will use the Leave Entry start and end time. The existing work segments will be extended to the Leave Time entry start and end time with any overlap being overlaid with the Leave Time.

Example:

| | | | |
|------------------------|--------------------------|-------|-------|
| Original Work Segments | 1995/05/18 | 7:30 | 15:30 |
| | 1995/05/19 | 11:00 | 14:00 |
| | 1995/05/20 | 12:00 | 20:00 |
| Leave Time Entry | 1995/05/18 to 1995/05/21 | 8:30 | 15:00 |

The result will be:

| | | | |
|---------------|------------|-------|-------|
| Work Segment | 1995/05/18 | 7:30 | 8:30 |
| Leave Segment | 1995/05/18 | 8:30 | 15:00 |
| Work Segment | 1995/05/18 | 15:00 | 15:30 |
| Leave Segment | 1995/05/19 | 8:30 | 15:00 |
| Leave Segment | 1995/05/20 | 8:30 | 15:00 |
| Work Segment | 1995/05/20 | 15:00 | 20:00 |
| Leave Segment | 1995/05/21 | 8:30 | 15:00 |

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A Leave Time Entry may optionally extend existing work time segments. The work time segments will be extended to the Leave Time entry start and stop time with any overlap being overlaid with the Leave Time.

Example:

| | | | |
|------------------------|--------------------------|-------|-------|
| Original Work Segments | 1995/05/23 | 8:30 | 16:30 |
| | 1995/05/25 | 8:30 | 16:30 |
| Leave Time Entry | 1995/05/23 to 1995/05/26 | 13:00 | 17:30 |

This will result in:

| | | | |
|---------------|------------|-------|-------|
| Work Segment | 1995/05/23 | 8:30 | 13:00 |
| Leave Segment | 1995/05/23 | 13:00 | 17:30 |
| Work Segment | 1995/05/25 | 8:30 | 13:00 |
| Leave Segment | 1995/05/25 | 13:00 | 17:30 |

A Leave Time Entry may optionally insert overlap time segment for days with existing work time segments.

Example:

| | | | |
|------------------------|--------------------------|-------|-------|
| Original Work Segments | 1995/05/21 | 8:00 | 16:00 |
| | 1995/05/23 | 8:00 | 16:00 |
| Leave Entry | 1995/05/20 to 1995/05/24 | 11:00 | 14:00 |

This will result in:

| | | | |
|---------------|------------|-------|-------|
| Work Segment | 1995/05/21 | 8:00 | 16:00 |
| Leave Segment | 1995/05/21 | 11:00 | 14:00 |
| Work Segment | 1995/05/23 | 8:00 | 16:00 |
| Leave Segment | 1995/05/23 | 11:00 | 14:00 |

A Leave Time Entry may optionally generate new time segments for days without existing work segments and insert overlap time segments for days with existing work segments.

| | | | |
|-----------------------|--------------------------|-------|-------|
| Original Work Segment | 1995/05/21 | 8:00 | 16:00 |
| | 1995/05/23 | 8:00 | 16:00 |
| Leave Segment | 1995/05/20 to 1995/05/23 | 11:00 | 14:00 |

This will result in:

| | | | |
|---------------|------------|-------|-------|
| Leave Segment | 1995/05/20 | 11:00 | 14:00 |
| Work Segment | 1995/05/21 | 8:00 | 16:00 |
| Leave Segment | 1995/05/21 | 11:00 | 14:00 |
| Leave Segment | 1995/05/22 | 11:00 | 14:00 |
| Work Segment | 1995/05/23 | 8:00 | 16:00 |
| Leave Segment | 1995/05/23 | 11:00 | 14:00 |

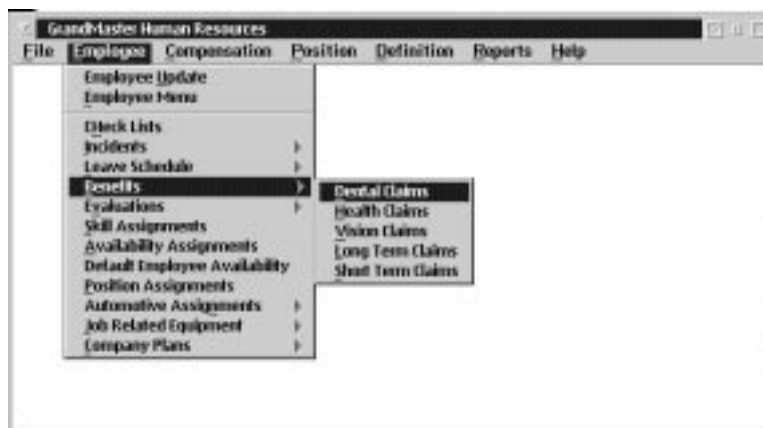
A leave processing entry may contain the following data fields. The type of leave will determine if all the fields are available.

| Field | Description |
|---|---|
| Start Date - all | Starting date for the leave entry date range. |
| End Date - all | Ending date for the leave entry date range. When this field is not entered it is assumed to be identical to the start date. |
| Start Time - all | Starting time for the leave entry time range. When overlay processing only is in effect this field may be zero. |
| Stop Time - all | Stop time for the leave entry time range. When overlay processing only is in effect this field may be zero. |
| Days of Week - vacation - training - in lieu - other | This field contains the days of the week that the leave entry may affect. The field is ignored for a one day date range. |
| Holiday Option - vacation - training - other | This check box determines if the leave entry generation option is in effect for holidays registered in the system calendar. |
| Weekend Option - vacation - training - other | This check box determines if the leave entry generation option is in effect for weekend days. |
| Generate Option - vacation - training - other | This check box turns on the segment generation option. |
| Overlay Option - all | This check box turns on the overlay segment processing option. |
| Replace Option - vacation - training - other | This check box turns on the replace segment processing option. |
| Extend Option - vacation - training - other | This check box turns on the extend segment processing option. |
| Overlap Option - vacation - training - other | This check box turns on the overlap processing option. |
| Reason - all | This field is validated code entry from a reason table for the leave type. |
| Description - all | This field is a free form multi-line text field that may be used for additional descriptive information. |

Benefits

The Benefits menu from the Employee menu bar is used to print benefits from the related data.

The Benefits menu appears as follows:

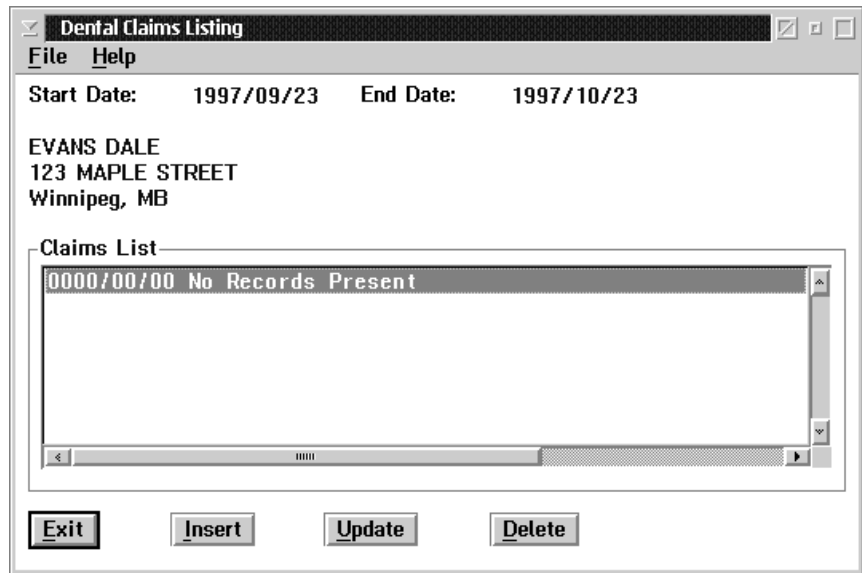


The type of benefits available are:

- Dental Claims
- Health Claims
- Long Term Claims
- Short Term Claims

Dental Claims

When the Dental Claim option from the Benefit sub menu is selected the following screen will appear:



The following table gives a description of the data fields:

| Field | Description |
|-------------|--|
| Start Date | This field contains the starting date of the dental claim. |
| End Date | This field contains the ending date of the dental claim. |
| Claims List | This field contains a list of dental claims on file. |

Insert

The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.

Update

The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.

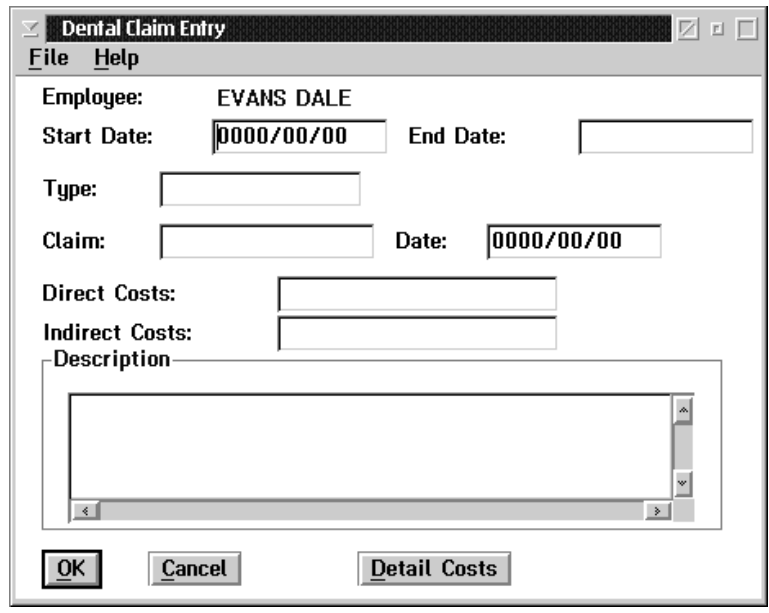
Delete

The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.

Esc (exit)

The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

When a new dental claim is inserted the following dialog box will appear:

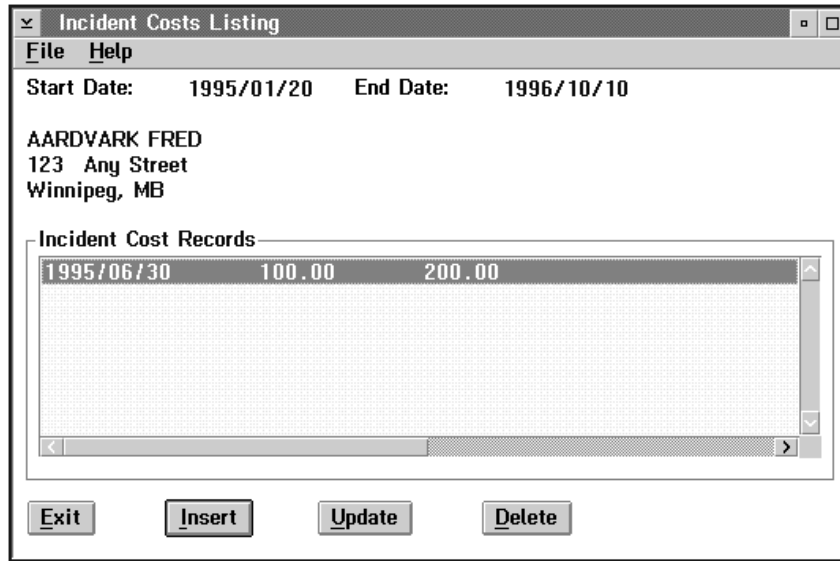


The following table gives a description of the data fields:

| Field | Description |
|----------------------|--|
| Employee | This field contains the employees name. |
| Start Date | This field contains the starting date of the dental claim. |
| End Date | This field contains the ending date of the dental claim. |
| Type | This field contains the type of dental claim. |
| Claim | This field contains the claim number. |
| Date | This field contains the date of the claim. |
| Direct Cost | This field contains the direct cost of the dental claim. |
| Indirect Cost | This field contains the indirect cost of the dental claim. |
| Description | This field contains a description of the dental claim. |

Detail Cost

When the user selects the DETAIL COST button the screen will appear as follows:



The screen displays the following data fields:

| Field | Description |
|------------------------------|---|
| Start Date | This field contains the starting date of the incident cost listing. |
| End Date | This field contains the ending date of the incident cost listing. |
| Employee | This field contains the employee name of the incident cost listing. |
| Incident Cost Records | This field contains the incident cost records on file. |

Insert

The INSERT button allows the user to insert an incident costs listing

Update

The UPDATE button allows the user to update an incident costs listing

Delete

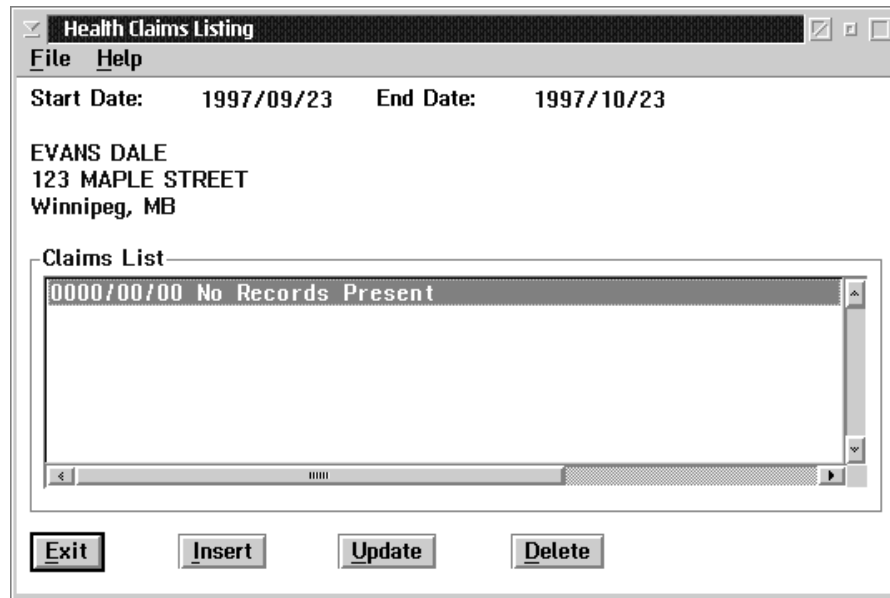
The DELETE button allows the user to delete an incident costs listing

Exit

The ESC key, EXIT button, or the **Exit** option from the file menu will exit the function.

Health Claims

When the Health Claim option from the Benefit sub menu is selected the following screen will appear:



The following table gives a description of the data fields:

| Field | Description |
|-------------|--|
| Start Date | This field contains the starting date of the health claim. |
| End Date | This field contains the ending date of the health claim. |
| Claims List | This field contains a list of claims on file. |

- Insert** The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.

- Update** The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.

- Delete** The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.

- Esc (exit)** The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

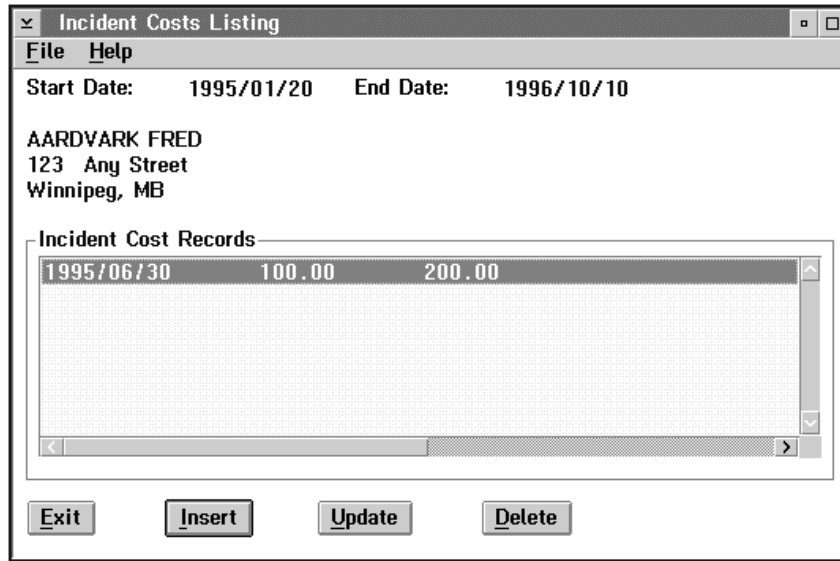
When a new health claim is inserted the following dialog box will appear:

The following table gives a description of the data fields:

| Field | Description |
|----------------------|--|
| Employee | This field contains the employees name. |
| Start Date | This field contains the starting date of the health claim. |
| End Date | This field contains the ending date of the health claim. |
| Type | This field contains the type of health claim. |
| Claim | This field contains the health claim number. |
| Date | This field contains the date of the claim. |
| Direct Cost | This field contains the direct cost of the health claim. |
| Indirect Cost | This field contains the indirect cost of the health claim. |
| Description | This field contains the description of the health claim. |

Detail Cost

When the user selects the DETAIL COST button the screen will appear as follows:



The screen displays the following data fields:

| Field | Description |
|------------------------------|---|
| Start Date | This field contains the starting date of the incident cost listing. |
| End Date | This field contains the ending date of the incident cost listing. |
| Employee | This field contains the employee name of the incident cost listing. |
| Incident Cost Records | This field shows a list of incident cost records on file. |

Insert

The INSERT button allows the user to insert an incident costs listing

Update

The UPDATE button allows the user to update an incident costs listing

Delete

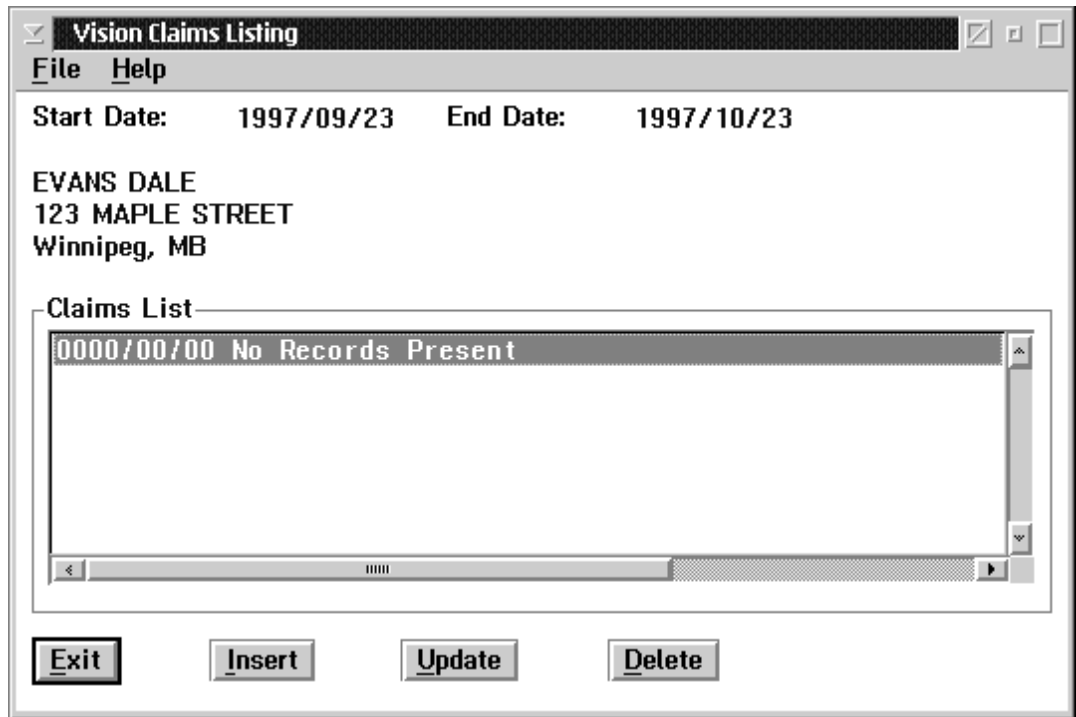
The DELETE button allows the user to delete an incident costs listing

Esc (exit)

The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function

Vision Claims

When the Vision Claim option from the Benefit sub menu is selected the following screen will appear:



The following table gives a description of the data fields:

| Field | Description |
|-------------|--|
| Start Date | This field contains the starting date of the vision claim. |
| End Date | This field contains the ending date of the vision claim. |
| Claims List | This field contains a list of claim on file. |

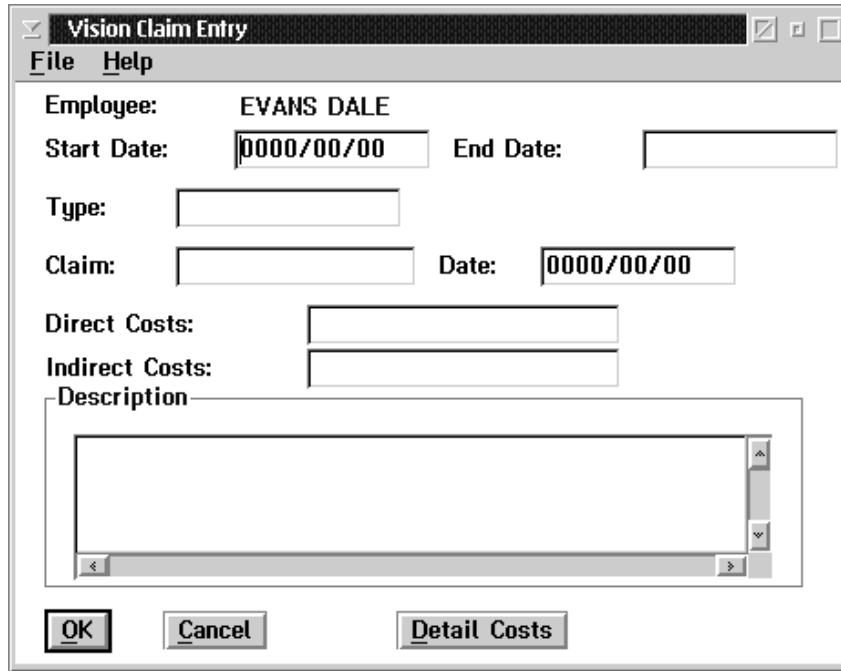
Insert The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.

Update The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.

Delete The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.

Esc (exit) The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

When a new vision claim is inserted the following dialog box will appear:

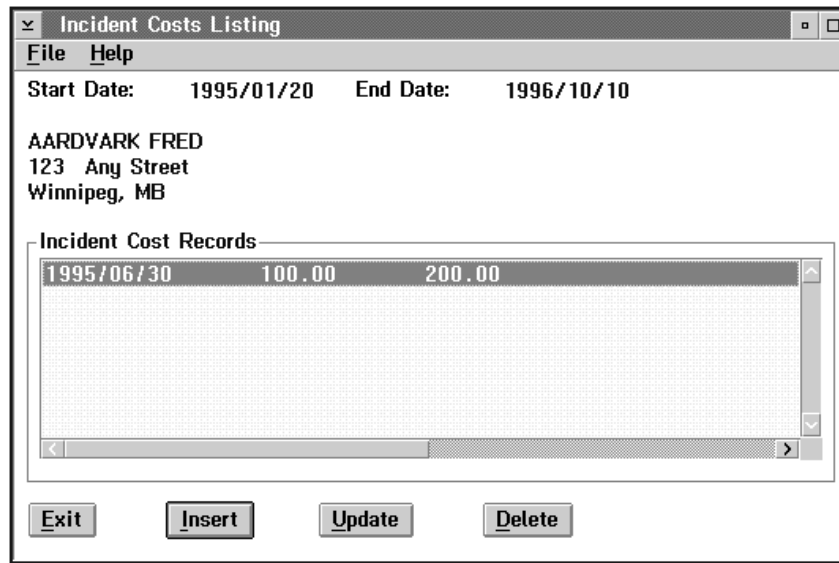


The following table gives a description of the data fields:

| Field | Description |
|----------------------|--|
| Employee | This field contains the employees name. |
| Start Date | This field contains the starting date of the vision claim. |
| End Date | This field contains the ending date of the vision claim. |
| Type | This field contains the type of vision claim. |
| Claim | This field contains the vision claim number. |
| Date | This field contains the date of the claim. |
| Direct Cost | This field contains the direct cost of the vision claim. |
| Indirect Cost | This field contains the indirect cost of the vision claim. |
| Description | This field contains the description of the vision claim. |

Detail Cost

When the user selects the DETAIL COST button the screen will appear as follows:



The screen requests the entry of the following data fields:

| Field | Description |
|-----------------------|---|
| Start Date | This field contains the starting date of the incident cost listing. |
| End Date | This field contains the ending date of the incident cost listing. |
| Employee | This field contains the employee name of the incident cost listing. |
| Incident Cost Records | This field shown a list of incident cost records on file. |

Insert

The INSERT button allows the user to insert an incident costs listing

Update

The UPDATE button allows the user to update an incident costs listing

Delete

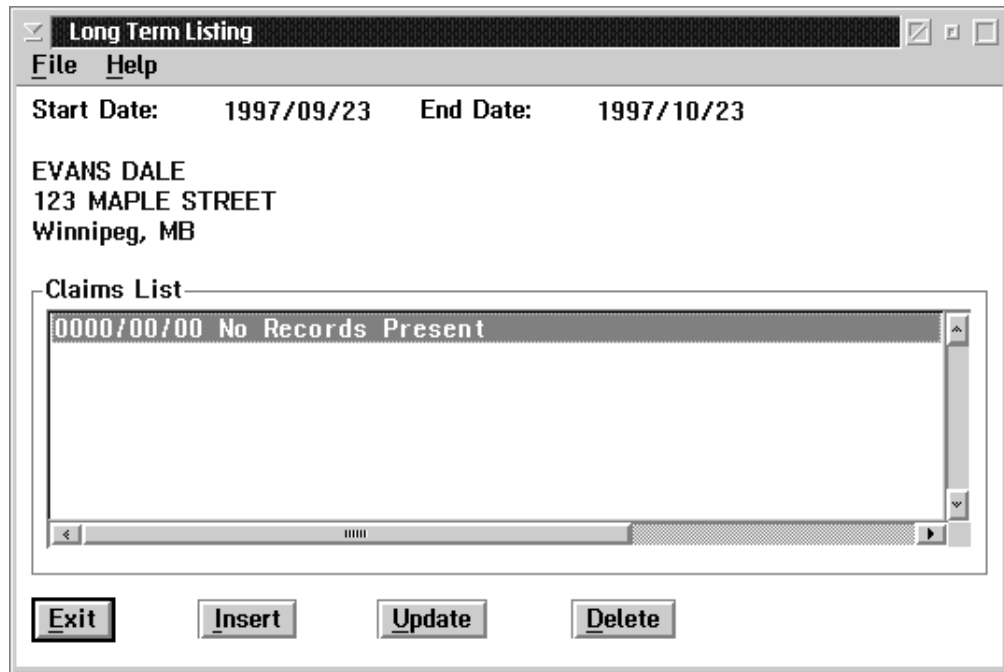
The DELETE button allows the user to delete an incident costs listing

Esc (exit)

The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

Long Term Claims

When the Long Term Claim option from the Benefit sub menu is selected the following screen will appear:



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The following table gives a description of the data fields:

| Field | Description |
|-------------|---|
| Start Date | This field contains the starting date of the long term claim. |
| End Date | This field contains the ending date of the long term claim. |
| Claims List | This field contains a list of claims on file. |

Insert

The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.

Update

The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.

Delete

The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.

Esc (exit)

The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

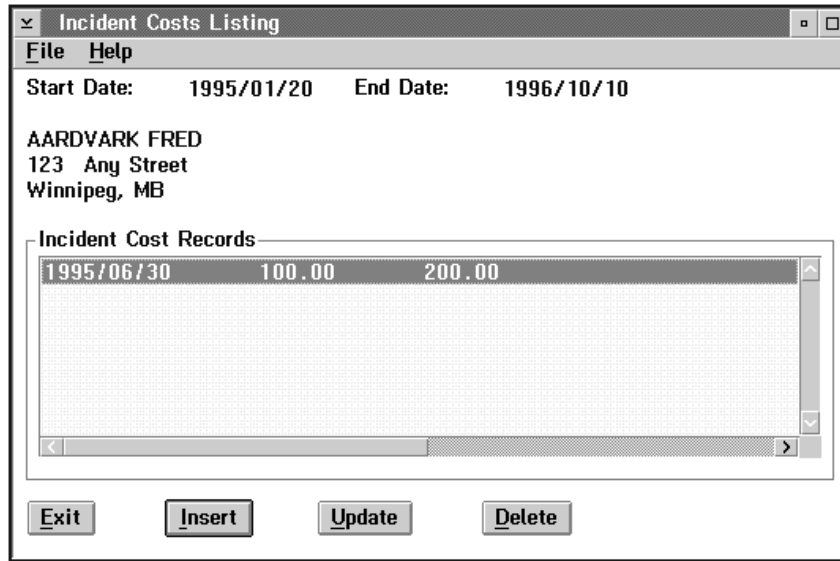
When a new long term claim is inserted the following dialog box will appear:

The following table gives a description of the data fields:

| Field | Description |
|----------------------|---|
| Employee | This field contains the employees name. |
| Start Date | This field contains the starting date of the long term claim. |
| End Date | This field contains the ending date of the long term claim. |
| Type | This field contains the type of long term claim. |
| Claim | This field contains the long term claim number. |
| Date | This field contains the date of the claim. |
| Direct Cost | This field contains the direct cost of the long term claim. |
| Indirect Cost | This field contains the indirect cost of the long term claim. |
| Description | This field contains a description of the long term claim. |

Detail Cost

When the user selects the DETAIL COST button the screen will appear as follows:



The screen requests the entry of the following data fields:

| Field | Description |
|------------------------------|---|
| Start Date | This field contains the starting date of the incident cost listing. |
| End Date | This field contains the ending date of the incident cost listing. |
| Employee | This field contains the employee name of the incident cost listing. |
| Incident Cost Records | This field contains a list of incident cost records on file. |

Insert

The INSERT button allows the user to insert an incident costs listing

Update

The UPDATE button allows the user to update an incident costs listing

Delete

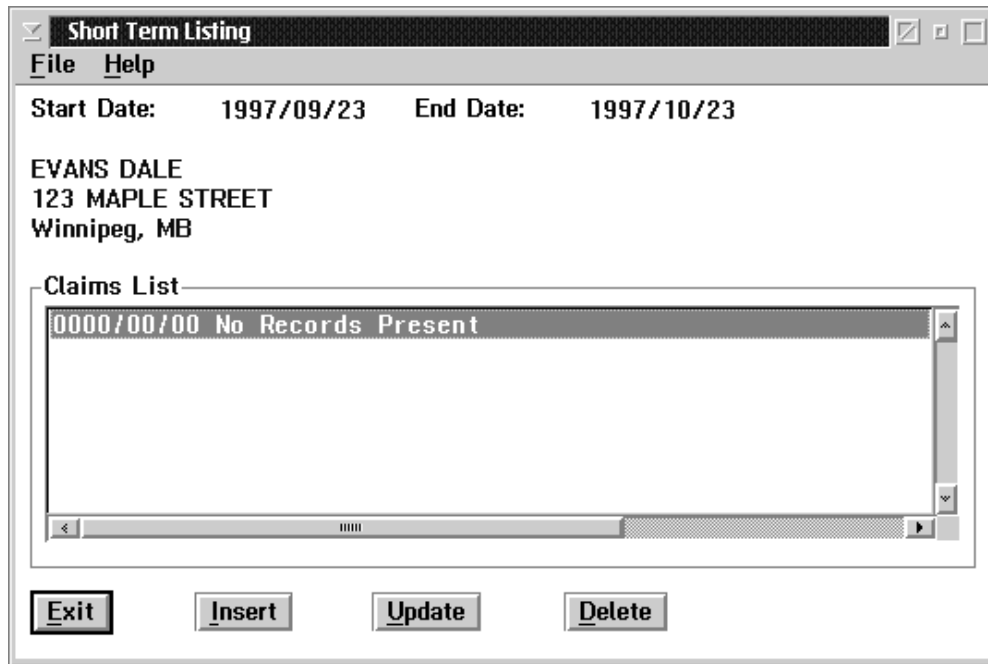
The DELETE button allows the user to delete an incident costs listing

Esc (exit)

The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function

Short Term Claims

When the Short Term Claim option from the Benefit sub menu is selected the following screen will appear:



The following table gives a description of the data fields:

| Field | Description |
|-------------|--|
| Start Date | This field contains the starting date of the short term claim. |
| End Date | This field contains the ending date of the short term claim. |
| Claims List | This field contains a list of short term claims. |

Insert

The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.

Update

The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.

Delete

The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.

Esc (exit)

The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

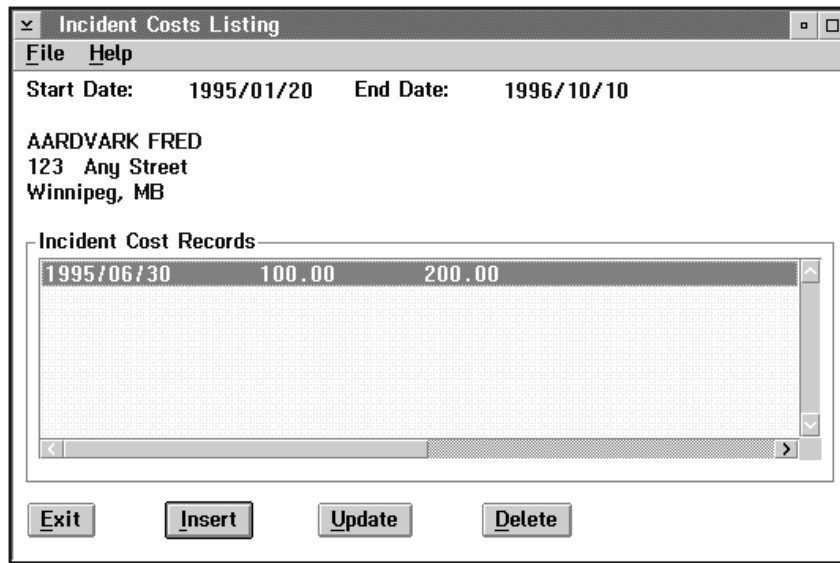
When a new Short Term claim is inserted the following dialog box will appear:

The following table gives a description of the data fields:

| Field | Description |
|----------------------|--|
| Employee | This field contains the employees name. |
| Start Date | This field contains the starting date of the short term claim. |
| End Date | This field contains the ending date of the short term claim. |
| Type | This field contains the type of short term claim. |
| Claim | This field contains the short term claim number. |
| Date | This field contains the date of the claim. |
| Direct Cost | This field contains the direct cost of the short term claim. |
| Indirect Cost | This field contains the indirect cost of the short term claim. |
| Description | This field contains a description of the short term claim. |

Detail Cost

When the user selects the DETAIL COST button the screen will appear as follows:



The screen requests the entry of the following data fields:

| Field | Description |
|-----------------------|---|
| Start Date | This field contains the starting date of the incident cost listing. |
| End Date | This field contains the ending date of the incident cost listing. |
| Employee | This field contains the employee name of the incident cost listing. |
| Incident Cost Records | This field contains a list of the Incident cost records on file. |

Insert

The INSERT button allows the user to insert an incident costs listing

Update

The UPDATE button allows the user to update an incident costs listing

Delete

The DELETE button allows the user to delete an incident costs listing

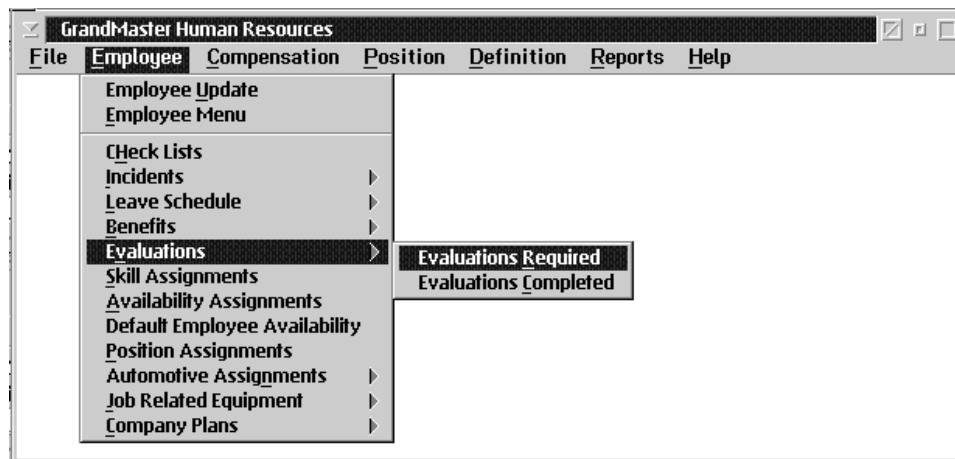
Esc (exit)

The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function

Evaluations

The Evaluations menu from the Employee menu bar is used to print evaluations from the related data.

The Evaluations menu appears as follows:



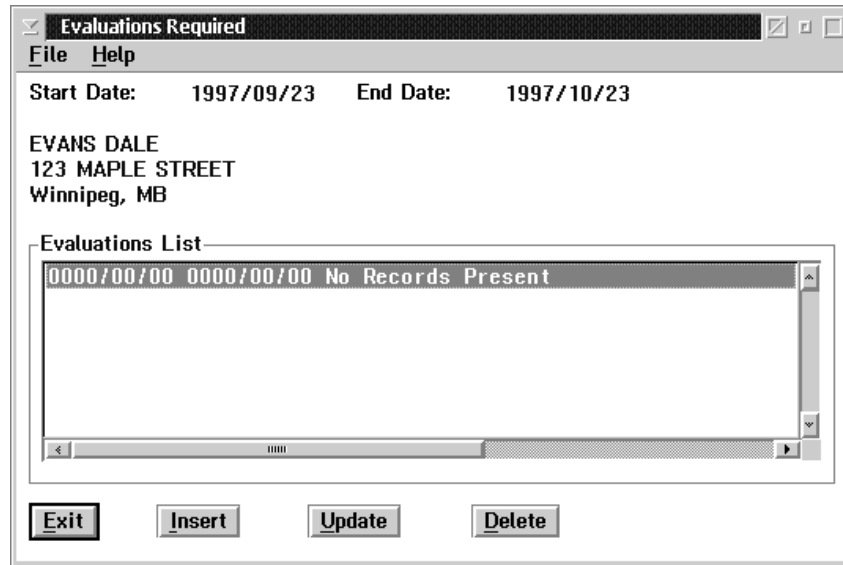
There are two types of evaluations:

- Evaluations Required
- Evaluations Completed

Evaluation Required

The **Evaluations Required** option provides the facility to evaluate an employee.

The Evaluations Required screen appears as follows:



The list displayed is restricted to assignments that fall within a date range. The date range displayed may be modified through the **Set Date Range** choice under the File menu.

The screen requests the entry of the following data fields:

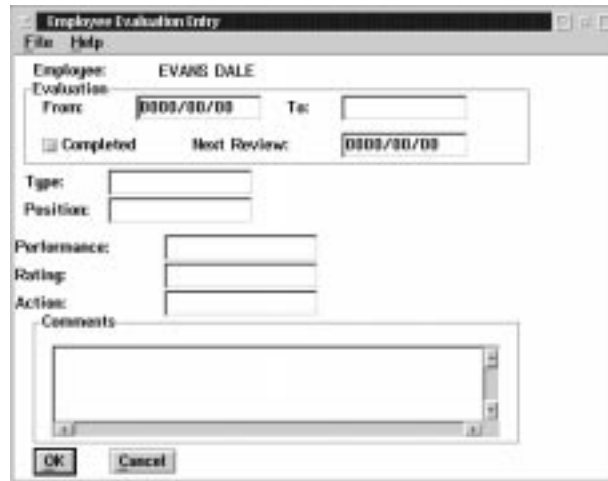
| Field | Description |
|------------------------|--|
| Start Date | This field contains the starting date of the evaluations required. |
| End Date | This field contains the ending date of the evaluations required. |
| Evaluation List | The list contains all the evaluations within the date range that have been previously defined. |

Insert The INSERT button allows the user to insert a new employee and evaluation.

Update The UPDATE button allows the user to update an employee and evaluation.

Delete The DELETE button allows the user to delete an employee and evaluation that is currently selected.

When the user selects one of the list entries the Employee Evaluation Entry screen will appear as follows:



The screen requests the entry of the following data fields:

| Field | Description |
|--------------------|---|
| Employee | This field is used to enter the employee name for the evaluation entry. |
| Start Date | This field is used to enter the starting date for the evaluation entry. |
| End Date | This field is used to enter the ending date for the evaluation entry. |
| Next Review | This field is used to enter the next review date for the evaluation entry. |
| Type | This field is used to enter the type code for the evaluation entry. |
| Position | This field is used to enter the position of the employee for the evaluation entry. |
| Performance | This field is used to enter the performance of the employee for the evaluation entry. |

F8(List) When the F8 key, or the List option from the menu is pressed a list of the options for the field where the cursor is placed will appear. This function will allow you to insert, update or delete an incident entry.

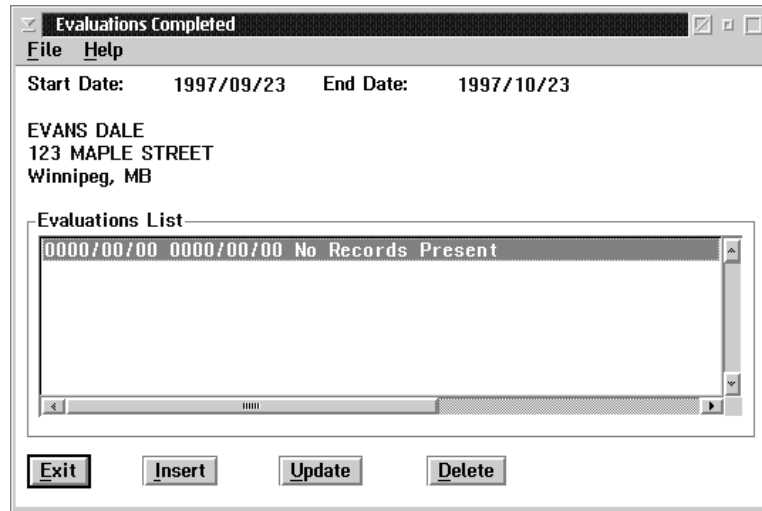
Save To save any changes made select the **Save** option from the File menu. The OK button will have the same effect.

Esc(Exit) To exit the screen without saving any changes select the **Exit** function from the File menu. The CANCEL button, or the ESC key will have the same effect.

Evaluation Completed

The Evaluations Completed menu from the Employee menu bar is used to print Evaluations Completed from the related data.

The Evaluations Completed menu appears as follows:



The list displayed is restricted to evaluations that fall within a date range. The date range displayed may be modified through the **Set Date Range** choice under the File menu.

The screen requests the entry of the following data fields:

| Field | Description |
|------------------------|--|
| Start Date | This field contains the starting date of the evaluations completed. |
| End Date | This field contains the ending date of the evaluations completed. |
| Evaluation List | The list contains all the evaluations within the date range that have been previously defined. |

Insert The INSERT button allows the user to insert a new employee and evaluation.

Update The UPDATE button allows the user to update an employee and evaluation.

Delete The DELETE button allows the user to delete an employee and evaluation that is currently selected.

When the user selects one of the list entries the Employee Evaluation Entry screen will appear as follows:



The screen requests the entry of the following data fields:

| Field | Description |
|--------------------|---|
| Employee | This field is used to enter the employee name for the evaluation entry. |
| Start Date | This field is used to enter the starting date for the evaluation entry. |
| End Date | This field is used to enter the ending date for the evaluation entry. |
| Next Review | This field is used to enter the next review date for the evaluation entry. |
| Type | This field is used to enter the type code for the evaluation entry. |
| Position | This field is used to enter the position of the employee for the evaluation entry. |
| Performance | This field is used to enter the performance of the employee for the evaluation entry. |

F8(List)

When the F8 key, or the List option from the menu is pressed a list of the options for the field where the cursor is placed will appear. This function will allow you to insert, update or delete an incident entry.

Save

To save any changes made select the **Save** option from the File menu. The OK button will have the same effect.

Esc(Exit)

To exit the screen without saving any changes select the **Exit** function from the File menu. The CANCEL button, or the Esc key will have the same effect.

Skills Assignments

The Human Resources Module provides facilities to assign skills to employees and skill requirements to positions.

The Human Resources main menu has a selection under **Employee** that allows the assignment of skills to the employees in the *current group*.

The Human Resources Employee menu has a selection under **Update Employee** that allows the assignment of skills to the *selected employee*.

The Human Resources Position menu has a selection under **Position** that allows the assignment of skills requirements to the *selected position*.

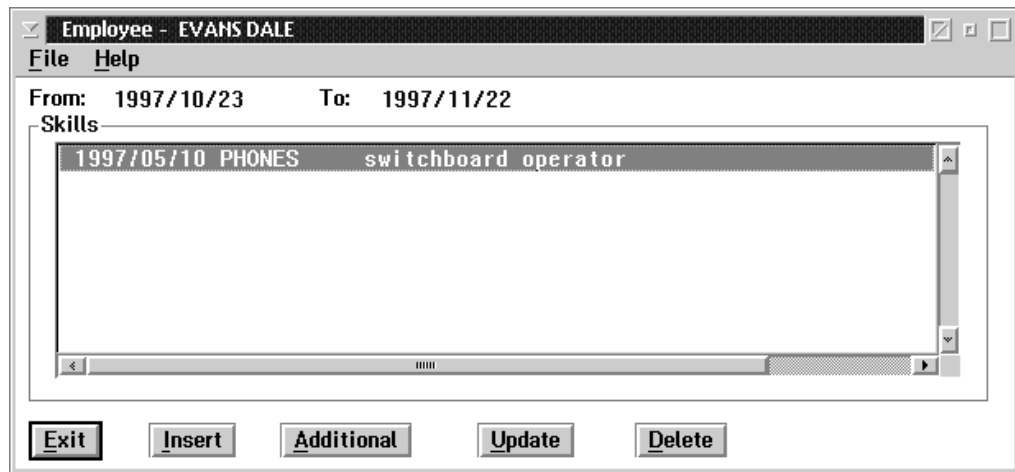
The skills are contained in the system general purpose code table in the group "\$SKILLS". This code table may be updated through the "code" validation update" or through the "on the fly" update through the code list.

Any number of skills may be assigned to each employee. The skill assignment uses a start and end date to indicate the date span the skill is in effect.

Any number of skill requirements may be assigned to a position. The skill requirements may be assigned to a position. The skill requirements uses a start and end date to indicate the date span the requirement is in effect.

Employee Skill Assignment

The **Employee Skill Assignment** option provides the facility to assign skills to an employee. This function displays a list of existing skill assignments.



The list displayed is restricted to assignments that fall within a date range. The date range displayed may be modified through the **Set Date Range** choice under the File Menu.

Insert

This button allows the user to insert a new employee and skill combination.

Additional

This button allows the user to insert a new skill for the same employee as the item currently selected.

Update

This button allows the user to update the employee and skill item currently selected.

Delete

This button allows the user to delete the employee and skill item currently selected. This function button is controlled through the User Privilege Settings in the Administration Module.

Employee Skill Assignment Update

This function allows the user to input the employee skill assignment.

The function provides the following input fields:

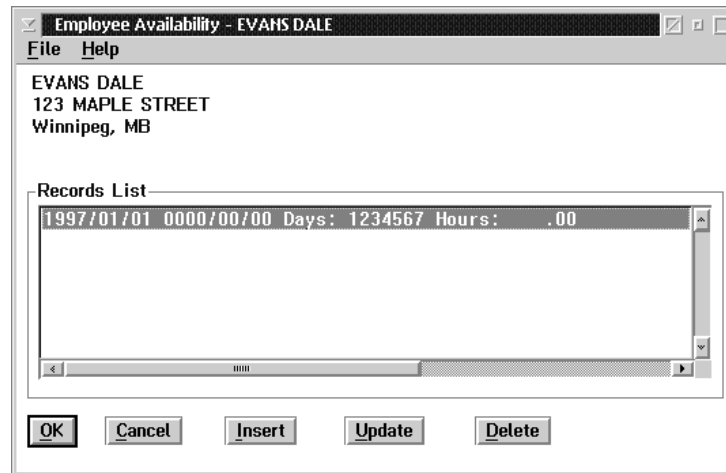
| Field | Description |
|-------------------|---|
| Skill | This field is used to input the skill code. This must be a valid code from the skill table. |
| Employee | This field is used to input the employee for the skill assignment. |
| Start Date | This field is used to input the starting date of a date range that the skill is in effect. |
| End Date | This field is used to input the ending date of a date range that the skill is effect. |



The date range may have a zero end date to indicate that the skill does not expire. The start date may be zero to indicate that the skill is in effect from the start of employment.

Availability Assignments

Employee Availability option allows the user to specify the days of the week and the time of day that the employee is available to work.



Set Date Range

A date range can be specified through the **Set Date Range** option in the File menu.

Two groups of fields may be input through the Employee Availability function. The first group is used for the days of the week, hours per week, and the times of day that the employee can be available for work. The second group of fields can be used to input the days and times that the employee would prefer to work.

Insert Item

The INSERT ITEM button can be used to insert new data into the list of employee availability.

Update Entry

When one of the items in the list is highlighted, pressing the UPDATE button will allow the user to update an item that has already been entered.

Delete Entry

The DELETE ENTRY button will clear the highlighted item from the list.

Additional

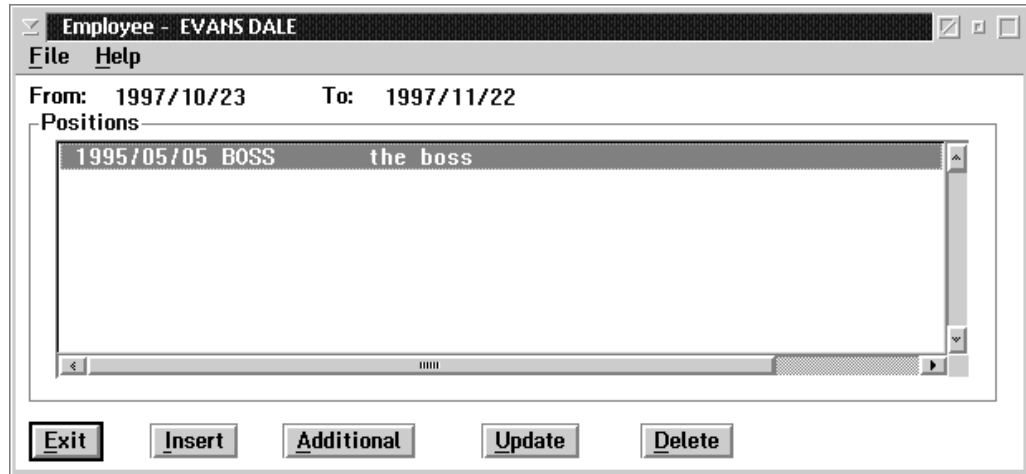
Additional fields are available that may be used to enter descriptive and coded data concerning availability through the **Additional for Employee** option in the File menu, or the Additional button.

A special system shift definition named "\$NOTAVAIL" may be used to specify specific dates and times that the employee will not be available for work.

The availability data for an employee is used to test any shift schedule data input. warning messages will be produced when scheduled dates and time produce conflict with the employee availability data input.

Position Assignment

The **Position Assignments** option allows the user to assign employees to the current selected position.



The function scans the employee assignments table for the position and presents a list of the assignments that are on file. The scans uses a date range to restrict the assignment presented. The default date range is from the current system date to a date 30 days after the current date. The user may select a different date range from the function menu.

The user may select to insert new assignments, update existing assignments, or delete existing assignments by pressing one of the function buttons.

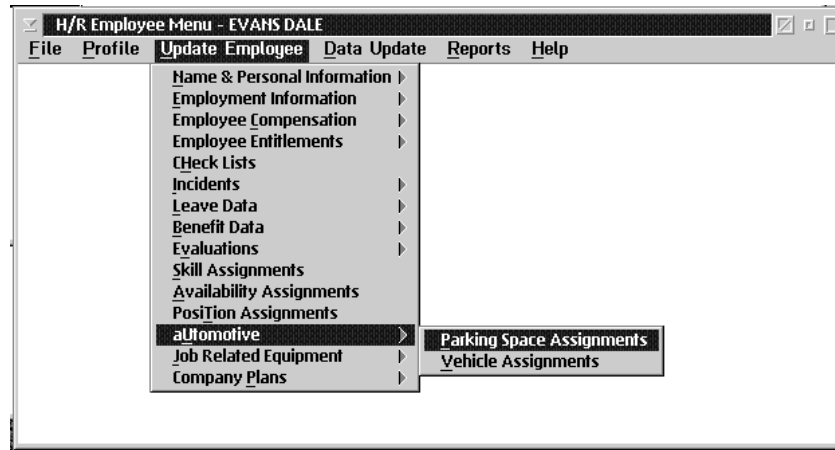
The data for each assignment consists of the following elements:

| Field | Description |
|-------------------|---|
| Position | This field contains the position for the assignment. |
| Employee | This field contains the name of the assigned to the position. |
| Start Date | This field contains the starting date for the assignment. |
| End Date | This field contains the ending date for the assignment. |

Automotive Assignments

The Automotive menu from the Employee menu bar is used to print the automotive from the related data.

The Automotive menu appears as follows:

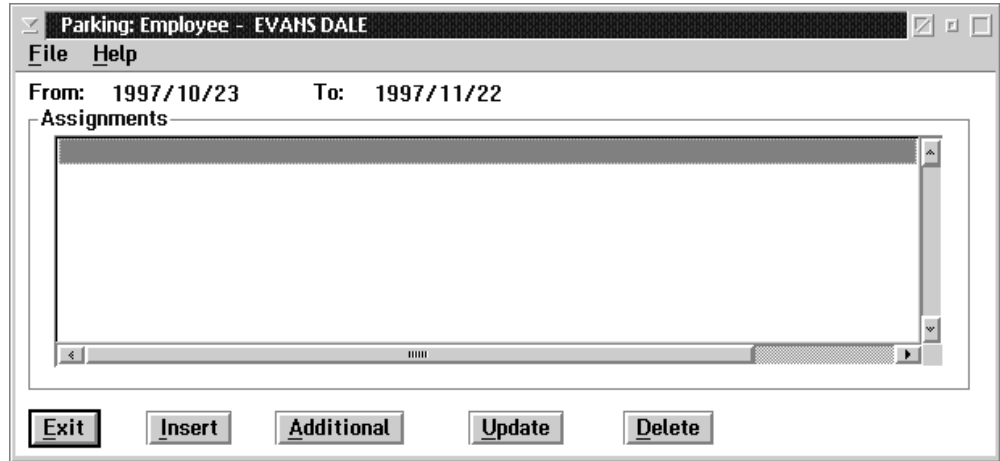


This option allows the user to assign the following to employees:

- Parking Spaces
- Vehicle Assignments

Parking Space Assignment

The **Parking Space Assignments** option is used to assign parking spots to employees. When the user selects this option, the following dialog box will appear:



The screen contains the following data fields:

| Field | Description |
|---------------------|---|
| Start Date | This field displays the starting date for the parking assignment. |
| End Date | This field displays the ending date for the parking assignment. |
| Employee | This field displays the employee name for the parking assignment. |
| Parking Spot | This field displays the parking spot for the parking assignment. |

- Insert** The INSERT button allows the user to insert a parking assignment for employees.
- Additional** The ADDITIONAL button allows the user to add an additional parking assignment to employees.
- Update** The UPDATE button allows the user to update a parking assignment for an employee.
- Delete** The DELETE button allows the user to delete a parking assignment for an employee.
- Esc (exit)** The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function

When the user selects one of the list entries the Parking Assignments screen will appear as follows:

The screen requests the entry of the following data fields:

| Field | Description |
|-------------------|---|
| Object | This field is used to enter the object name for the parking assignment. |
| Employee | This field is used to enter the employee name for the parking assignment. |
| Start Date | This field is used to enter the starting date for the parking assignment. |
| End Date | This field is used to enter the ending date for the parking assignment. |

F8(List)

When the **F8** key is pressed a list of the options for the field where the cursor is placed will appear. This function will allow you to insert, update or delete a parking assignment.

Save

To save any changes made press OK button will have the same effect.

Esc (Exit)

To exit the screen without saving any changes press the **ESC** key. The CANCEL button will have the same effect.

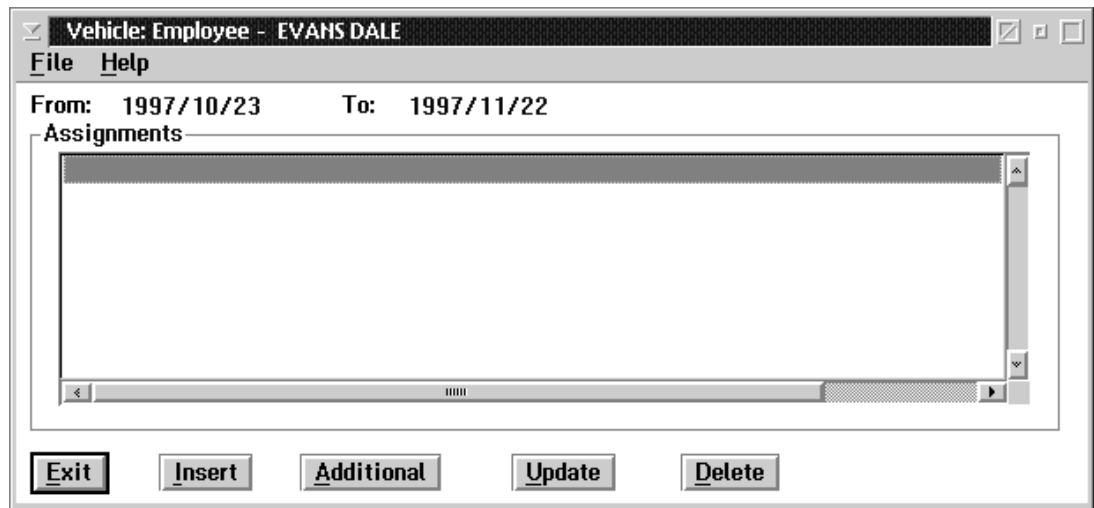
Example:

| |
|-----------------------------|
| Object - Spot 3 |
| Employee - Fred Aardvark |
| Start Date - April 30, 1996 |
| End Date - October 3, 1996 |

Vehicle Assignments

The **Vehicle Assignments** option is used to assign a vehicle to employees.

When the user selects this option the following dialog box appears:



The screen contains the following data fields:

| Field | Description |
|-------------------|--|
| Start Date | This field is displays t he starting date for the vehicle assignment. |
| End Date | This field is displays the ending date for the vehicle assignment. |
| Employee | This field is displays the employee name for the vehicle assignment. |
| Vehicle | This field is displays the make of the vehicle for the vehicle assignment. |

Insert

The INSERT button allows the user to insert a vehicle assignment for employees.

Additional

The ADDITIONAL button allows the user to add an additional vehicle assignment for an employee.

Update

The UPDATE button allows the user to update a vehicle assignment for an employee.

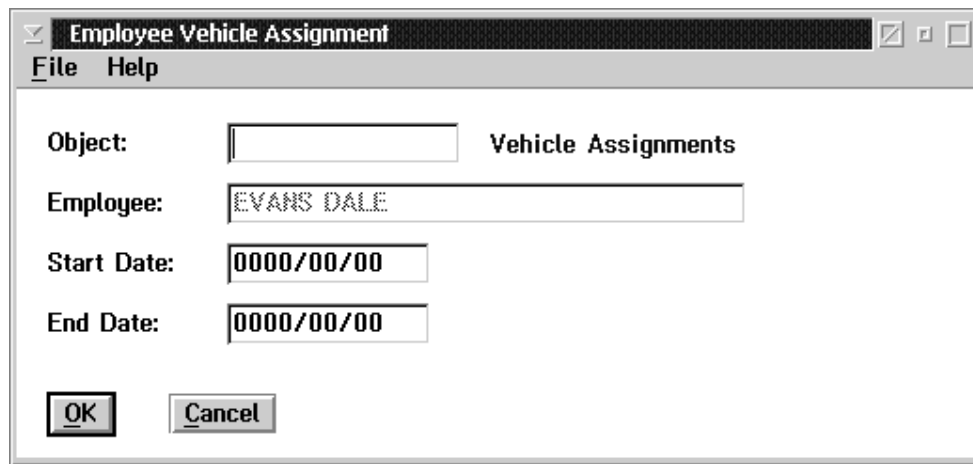
Delete

The DELETE button allows the user to delete a vehicle assignment for an employee.

Esc (exit)

The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function

When the user selects one of the list entries the Vehicle Assignment screen will appear as follows:



The screen requests the entry of the following data fields:

| Field | Description |
|-------------------|---|
| Object | This field is used to enter the object name for the vehicle assignment. |
| Employee | This field is used to enter the employee name for the vehicle assignment. |
| Start Date | This field is used to enter the starting date for the vehicle assignment. |
| End Date | This field is used to enter the ending date for the vehicle assignment. |

F8 (List)

When the F8 key is pressed a list of the options for the field where the cursor is placed will appear. This function will allow you to insert, update or delete a vehicle assignment.

Save

To save any changes made press the F10 key. The OK button will have the same effect.

Esc (Exit)

To exit the screen without saving any changes press the ESC key. The CANCEL button will have the same effect.

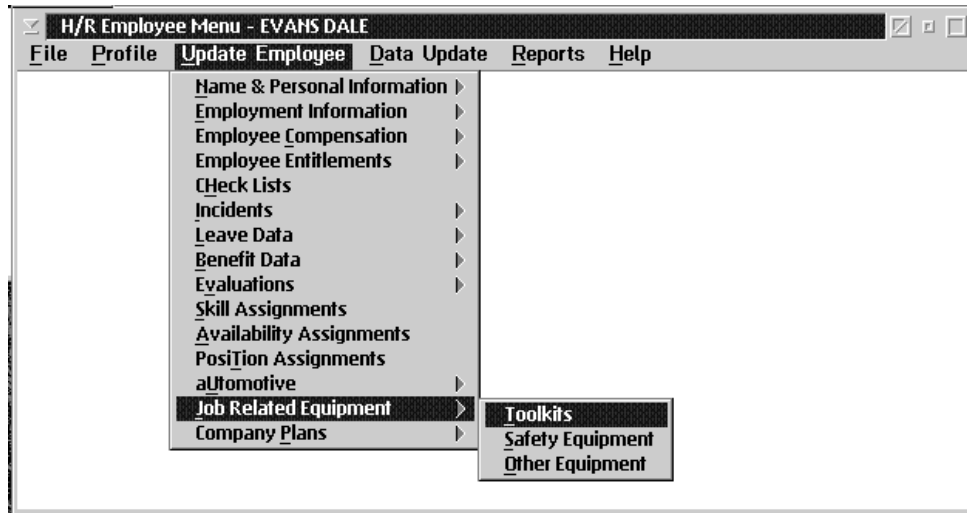
Example:

| | |
|--------------|-----------------|
| Object - | GMC Sierra |
| Employee - | Fred Aardvark |
| Start Date - | April 30, 1996 |
| End Date - | October 3, 1996 |

Job Related Equipment

The Job Related Equipment menu from the Employee menu bar is used to print Job Related Equipment from the related data.

The Job Related Equipment menu appears as follows:

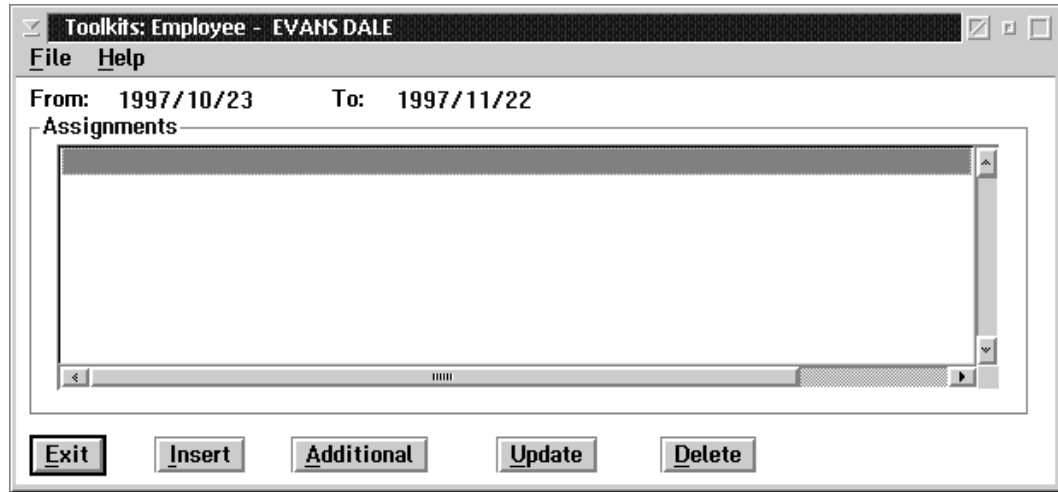


This option allows the user to assign the following equipment to employees:

- Toolkits
- Safety Equipment
- Other Equipment

Toolkit Assignment

The **Toolkit Assignment** option is used to assign tools to employees. When the user selects this option, the following dialog box will appear:



The screen contains the following data fields:

| Fields | Description |
|-------------------|---|
| Start Date | This field displays the starting date for the toolkit assignment. |
| End Date | This field displays the ending date for the toolkit assignment. |
| Employee | This field displays the employee name for the toolkit assignment. |
| Toolkit | This field displays the tool for the toolkit assignment. |

- Insert** The INSERT button allows the user to insert a toolkit assignment for employees.

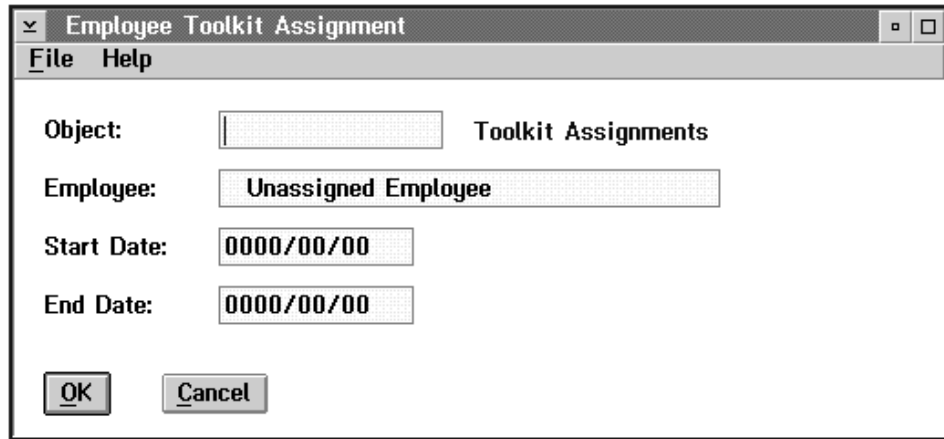
- Additional** The ADDITIONAL button allows the user to add an additional toolkit assignment to employees.

- Update** The UPDATE button allows the user to update a toolkit assignment for an employee.

- Delete** The DELETE button allows the user to delete the toolkit assignment for an employee.

- Esc (exit)** The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function

When the user selects one of the list entries the toolkit assignment screen will appear as follows:



The screen requests the entry of the following data fields:

| Field | Description |
|-------------------|---|
| Object | This field is used to enter the object name for the toolkit assignment. |
| Employee | This field is used to enter the employee name for the toolkit assignment. |
| Start Date | This field is used to enter the starting date for the toolkit assignment. |
| End Date | This field is used to enter the ending date for the toolkit assignment. |

F8 (List)

When the F8 key is pressed a list of the options for the field where the cursor is placed will appear. This function will allow you to insert, update, or delete a toolkit assignment.

Save

To save any changes made pressing the OK button will have the same effect.

Esc (exit)

To exit the screen without saving any changes press the ESC key. The CANCEL button will have the same effect.

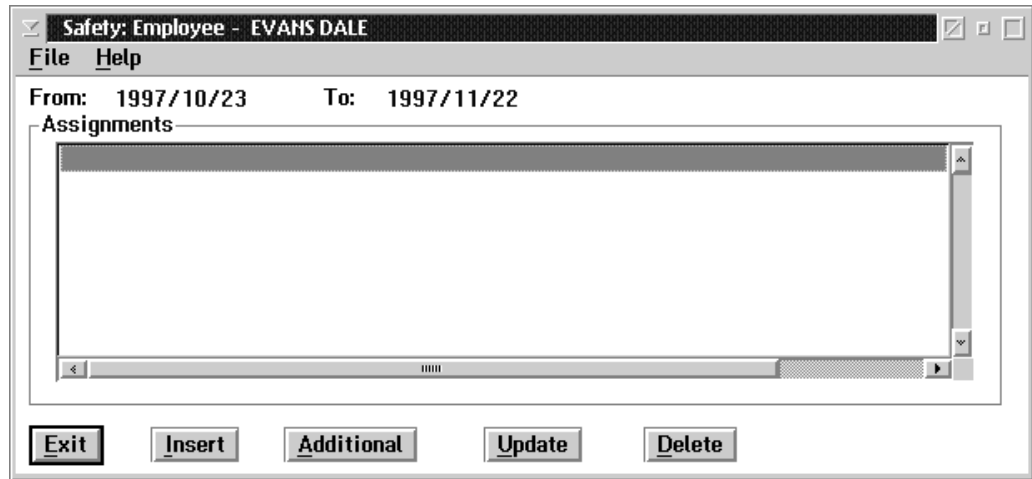
Example:

| |
|-----------------------------|
| Object - Wrench |
| Employee - Fred Aardvark |
| Start Date - April 30, 1996 |
| End Date - October 3, 1996 |

Safety Equipment

The **Safety Equipment** option is used to assign safety equipment to employees.

The **Safety Equipment** option brings up the following dialog box:



The screen contains the following data fields:

| Fields | Description |
|-------------------|--|
| Start Date | This field displays the starting date for the safety equipment assignment. |
| End Date | This field displays the ending date for the safety equipment assignments. |
| Employee | This field displays the employee name for the safety equipment assignment. |
| Safety | This field displays the equipment for the safety equipment assignment. |

Insert

The INSERT button allows the user to insert safety equipment assignments for employees.

Additional

The ADDITIONAL button allows the user to add safety equipment assignments to employees.

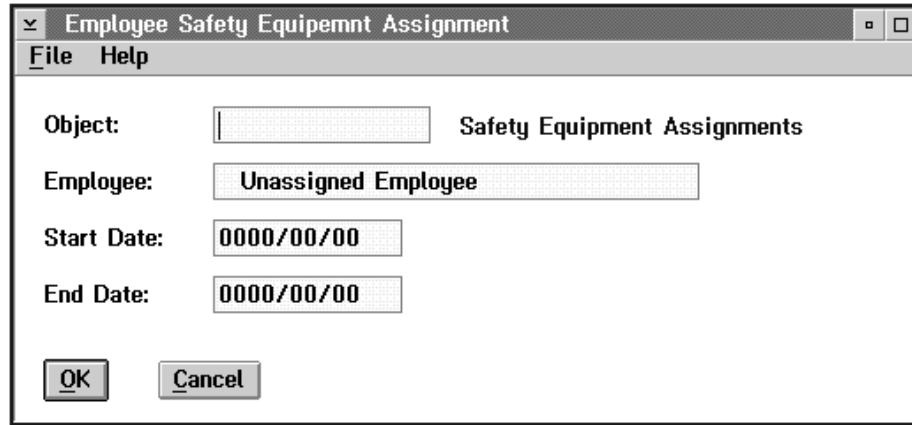
Update

The UPDATE button allows the user to update safety equipment assignments to employees.

Delete

The DELETE button allows the user to delete safety equipment assignments for an employee

When the user selects one of the list entries the Safety Equipment assignment screen will appear as follows:



The screen requests the entry of the following data fields:

| Field | Description |
|-------------------|--|
| Object | This field displays the object name for the safety equipment. |
| Employee | This displays the employee name for the safety equipment assignment. |
| Start Date | This field displays the starting date for the safety equipment assignment. |
| End Date | This field displays the ending date for the safety equipment assignment. |

F8 (List)

When the F8 key is pressed a list of the options for the field where the cursor is placed will appear. This function will allow you to insert, update or delete a safety equipment assignment.

Save

To save any changes made press the OK button.

Esc (Exit)

To exit the screen without saving any changes press the ESC key. The CANCEL button will have the same effect.

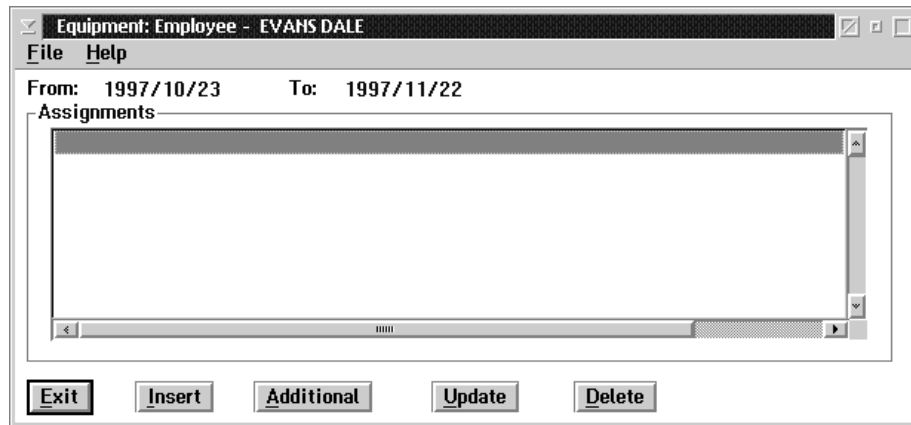
Example:

| | |
|--------------|-----------------|
| Object - | Hard Hat |
| Employee - | Fred Aardvark |
| Start Date - | April 30, 1996 |
| End Date - | October 3, 1996 |

Other Equipment

The **Other Equipment** option is used to assign equipment to employees.

When the user selects this option, the following dialog box will appear:



The screen contains the following data fields.

| Field | Description |
|-------------------|---|
| Start Date | This field displays the starting date for the other equipment assignment. |
| End Date | This field displays the ending date for the other equipment assignment. |
| Employee | This field displays the employee name for the other equipment assignment. |
| Toolkit | This field displays the tool for the other equipment assignment. |

Insert

The INSERT button allows the user to insert an other equipment assignments for employees.

Additional

The ADDITIONAL button allows the user to add other equipment assignments to employees.

Update

The UPDATE button allows the user to update other equipment assignments to employees.

Delete

The DELETE button allows the user to delete other equipment assignments to employees.

When the user selects one of the list entries the other equipment assignment screen will appear.

The screen requests the entry of the following data fields:

| Field | Description |
|-------------------|---|
| Object | This field displays the object name for the other equipment assignment. |
| Employee | This field displays the employee name for the other equipment assignment. |
| Start Date | This field displays the starting date for the other equipment assignment. |
| End Date | This field displays the ending date for the other equipment assignment. |

F8 (List)

When the F8 key is pressed a list of the options for the field where the cursor is placed will appear. This function will allow you to insert, update or delete a toolkit assignment.

Save

To save any changes made press the F10 key. The OK button will have the same effect.

Esc (Exit)

To exit the screen without saving any changes press the ESC key. The CANCEL button will have the same effect.

Example:

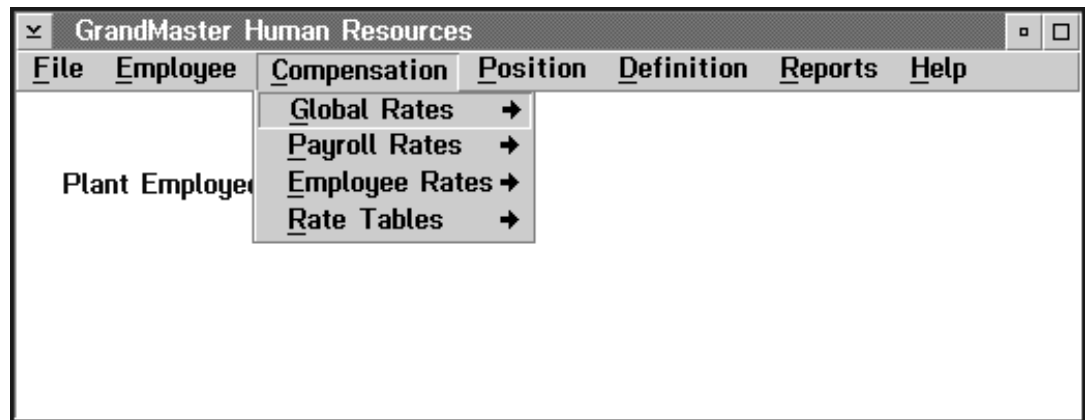
| | |
|--------------|-----------------|
| Object - | Cell Phone |
| Employee - | Fred Aardvark |
| Start Date - | April 30, 1996 |
| End Date - | October 3, 1996 |

■

COMPENSATION

The **Compensation** menu from the main menu bar is used for compensation in the GrandMaster Suite Human Resource module.

The **Compensation** menu appears as follows:



The Compensation menu of the Human Resource module allows the user to set up all types of:

- Global Earnings
- Payroll Earnings
- Employee Rates
- Rate Tables

Global Rates

The following submenu appears when the user selects the **Global Rates** option:



The Global Rates options available to the user in this sub menu are:

- Global Earnings
- Global Position Earnings
- Global Deductions
- Global Accumulators



Global Rates pertain to all Earnings, Positions, Earnings, Deductions and Accumulators setup in the system cross referencing between payrolls.

Global Earning Types

Global Earning Types are used to define the categories of earnings that will be reported for employees.

The earning categories defined must adhere to the Revenue Canada and Human Resources Canada requirements for assessment of employee source deductions.

An Earning Types will have to be present to provide pay rates for regular time, over time, and double time.

Earning types also have to be defined for those amounts that are paid out as a result of Accumulator Type processing.

The following table outlines some common Earning Types:

| Earning Type | Description |
|--------------------------|--|
| Regular Hours | Earning type used for hours worked at the employee regular rate of pay. This earning is subject to taxes, CPP and EI. |
| Over time Hours | Earning Type used is hours worked at the employees over time rate of pay. This earning is subject to taxes, CPP and EI. |
| Double Time Hours | Earning type used for hours worked at the employees double time rate. This earning is subject to taxes, CPP and E.I. |
| Vacation Taken | Earning Type used for earnings that occur when an employee takes vacation. This earning has insurable dollars and hours for EI purposes as well as being subject to taxes and CPP. |
| Vacation Paid Out | Earning Type used for earnings that occur when an employee has vacation paid out. This earning has insurable dollars only for EI purposes as well as being subject to taxes and CPP. |
| Travel Expense | Earning Type used for reimbursement of travel expenses for an employee. This earning is not subject to taxes, CPP or EI |
| Sick Pay | Earning Type used for payment of sick pay. This earning is subject to taxes, CPP and EI. |

Earning Types and Effective Dates

The Suite H/R provides support for effective dates on earning types. This allows the changes made to earning type definitions to have a start date and an end date that specify the effective date range for the earning type occurrence.

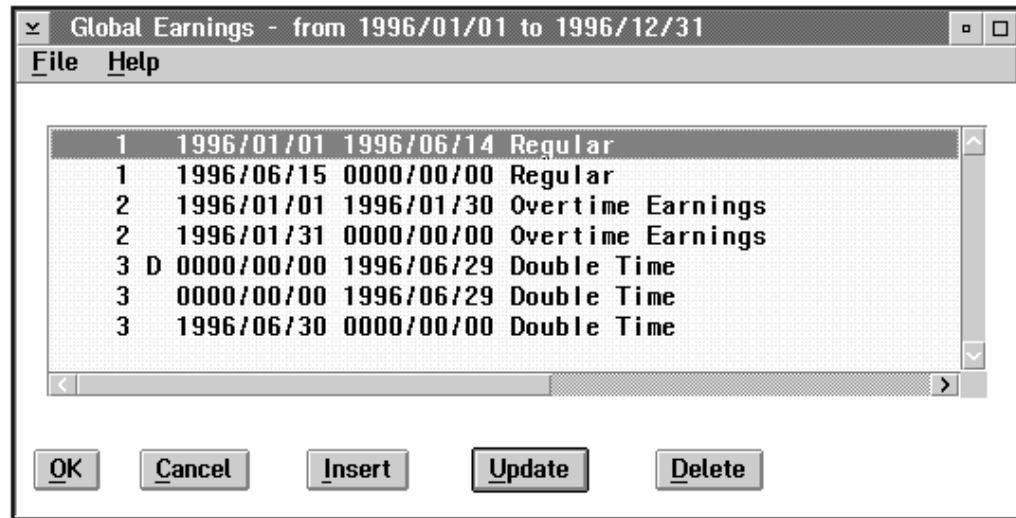
An example of this would be the overall over time rate for the company is being changed from a rate that is 1.4 times the employees regular rate of pay to 1.5 times the employees regular rate of pay effective June 17, 1997. A new occurrence of the over time earning type would be set up with an effective date of June 17, 1997 with the new multiplier for the over time rate. If this date falls in the middle of a pay period the over time hours worked prior to June 17, 1997 would be paid at 1.4 times rate, the over time hours worked on and after June 17 would be paid 1.5 times rate.

The effective date range for the different occurrence of an earning type may not overlap. The update process will not allow the entry of a date range that will result in an overlap.

Global Earnings

The **Global Earnings** option is used to assign global earnings to employees.

When the user selects this option, the following screen will appear:



The list may contain from left to right the earning code, the letter “D” if the earning code has been deleted, date effective from, date effective until, and a description of the earning code.

Set Date Range The **Set Date Range** option in the File menu allows the user to change the date range in order to narrow the number of earnings which appear in the list. If a date range has been set, the range selected will appear in the title bar of the dialog box.

Show Dates If the **Show Dates** option in the File menu is selected the date range when each earning is effective will appear in the list.

Show Deleted Earnings If the **Show Deleted Earnings** option in the File menu is selected the earnings that have been deleted will appear in the list. The letter “D” will appear to the left of the deleted earnings.

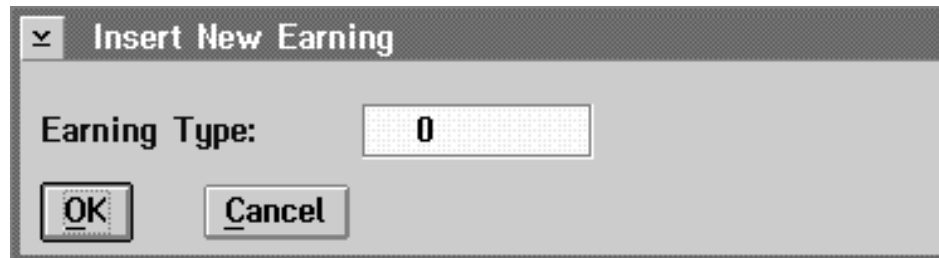
OK The OK button will save any changes made in the dialog box.

Esc (exit) The ESC key, CANCEL button, or the **Exit** option from the File menu exit the dialog box without saving any changes.

Insert The INSERT button allows the user to insert a new global earnings.

The Insert Button is used to insert a new earnings in the payroll. The insert button will display a dialog box that requests the new earning type number. If the number of an existing earning type is entered in the earning type field the function will retrieve the latest version of that earning type for update.

The Insert New Earning screen appears as follows:



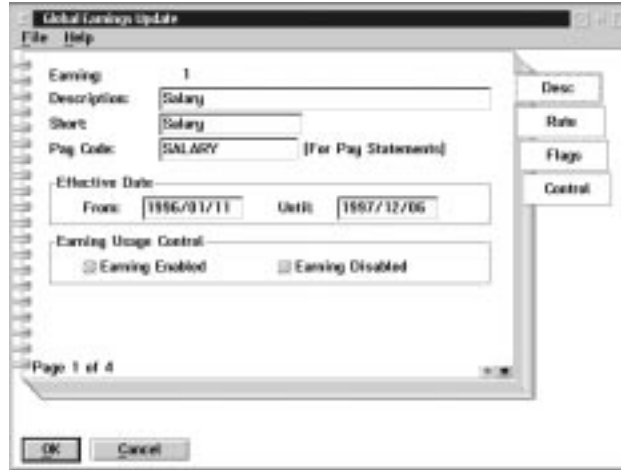
Global Earning Update

The Earning Update screen contains a notebook with four pages. Each of these pages contains information that is used for processing the earnings. The Payroll Level earnings data is used in conjunction with the employee earnings rates and hours worked to determine the employees pay.

The values set in the Master Earning Rate page are used as the default values for the employee level earning rates. The employee level rates can change any of the rate evaluation data.

The Description page contains fields for describing the earnings and settings the effective date range for the earning type.

When you select the description tab on the Global Earning update the following screen will appear:



The following table gives a description of the data fields:

| Field | Description |
|------------------------------|---|
| Earning | This field contains the code number of the earning. |
| Description | The description field is used for describing the earning on pop-up lists and for reports. |
| Short | The short description field is used for printing a description on pay statements. |
| Alternate | This field contains an alternate description of the earning. |
| From Date | This field is used to set the starting date of the effective date range for the earning. |
| Until | This field is used to set the ending date of the effective date range for the earning. |
| Earning Usage Control | If the earning enabled box is checked the earning is enabled. If the earning disabled box is checked the earning is disabled. |



Normally only the starting date is entered when entering an earning. The function automatically sets the end date of the earning type when a new entry for the earning type is made with a start date that is later than the start date on an existing earning entry.

The Rate page contains data fields that are used to set the default page rate treatments. These values may be changed for the individual employee when setting up the Employee pay rates.

When you select the rate tab or the Global Earning update the following screen will appear:

Global Earnings Update

File Help

Rate Evaluation Method

Use Set Rate Use Multiplier Use Rate Table

Rate Units

Pay Period Hour Annual Piece

Rate Units EI parm

Multiplier Parameters

Multiplier: Base:

Base Earn

Rate Table Parameters

Table: Row: Column: Accumulator:

Page 2 of 4

Desc

Rate

Flags

Control

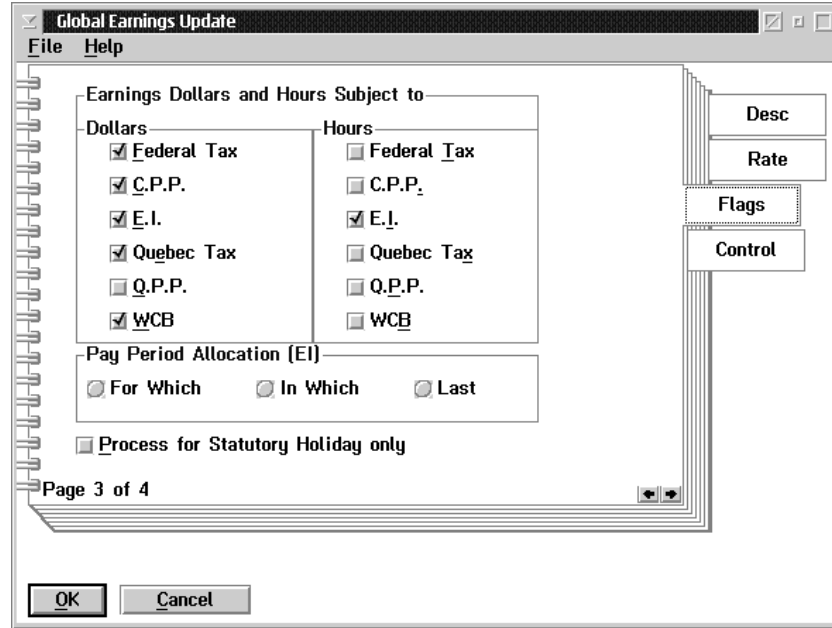
OK Cancel

The following table gives a description of the data fields:

| Field | Description |
|------------------------------|---|
| Use Set Rate | This field contains the values entered in the Rate field and the setting if the Rate Units buttons to set a pay rate for the earning. When the pay period is pressed the value in the Rate field is treated as an amount of pay for each pay period and the value in the units field is treated as the standard number of hours worked in the pay period. When the annual button is pressed the value in the units field is treated as an amount of pay for the year and the number of hours in the year. When the hour button is pressed the value in the Rate field is treated as a rate per hour. The value in the hours field is treated as the standard number of hours worked per pay period. When the Piece Rate button is pressed the value in the rate field is the standard rate per piece. |
| Use Multiplier | This field contains the value in the multiplier field and the rate for the base rate earning to determine the rate for the earning. The rate for the earning is the product of the value in the multiplier field and the resolved rate for the earning type selected as the base Earning. |
| Use Rate Table | This field contains a rate table to determine the rate value for the earning. The row and column fields can be used to determine the location in the rate table that has the rate value to use. The Table field allows the entry of the Rate Table Name to use. Note- the system supports any number of different rate tables. |
| Rate Units | This field contains a set of radio buttons that determine the period that the rate applies to. These buttons are "Pay Period", "Hour", "Annual" and "Piece". The rate unit selected will be used to determine the processing used when evaluating the rate of the pay calculation. |
| Set Rate Parameters | This field contains the field that are used when the "Use Set Rate" method is in use. |
| Multiple Parameters | This field contains fields that are used when the "Use Multiplier" method is in use. |
| Rate Table Parameters | This field contains the fields that are used when the "Use Rate Table" method is in use. |

The Flags page contains fields that indicate whether or not the earning type is subject to the various payroll source deductions and taxes.

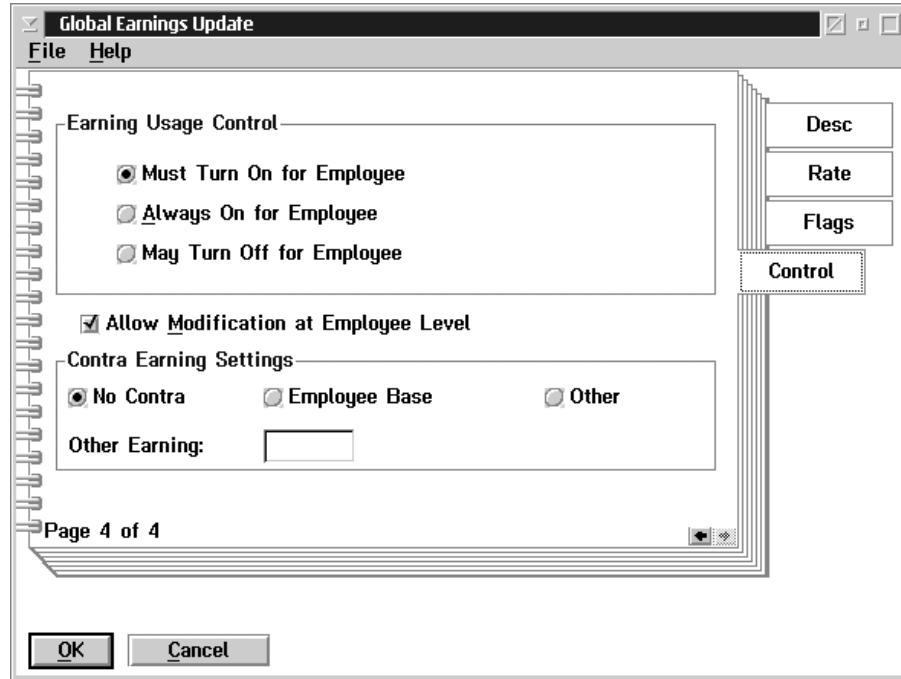
When you select the flag tab on the Global Earning update the following screen will appear:



The following table gives a description of the data fields:

| Field | Description |
|-------------------------------------|--|
| Earning Dollars | If the box is checked the earnings are subject to Federal tax, CPP E.I., Quebec Tax, QPP, WCB. |
| Earning Hours | If the box is checked the earning hours are subject to federal tax, CPP, E.I. Quebec Tax, QPP, WCB. |
| Pay Period Allocation (E.I.) | The Pay Period Allocation buttons affect the treatment of the hours in the earning when preparing Record of Employment forms. Please refer to the Human Resource Canada documents to determine the treatment for the pay period allocation of insurable hours. |
| Process Statutory Holiday | When this button is pressed the earning being set up will process for statutory holidays only. |

The Control page contains a number of options for the processing of the earning type. When you select the control tab on the Global Earning update the following screen will appear:



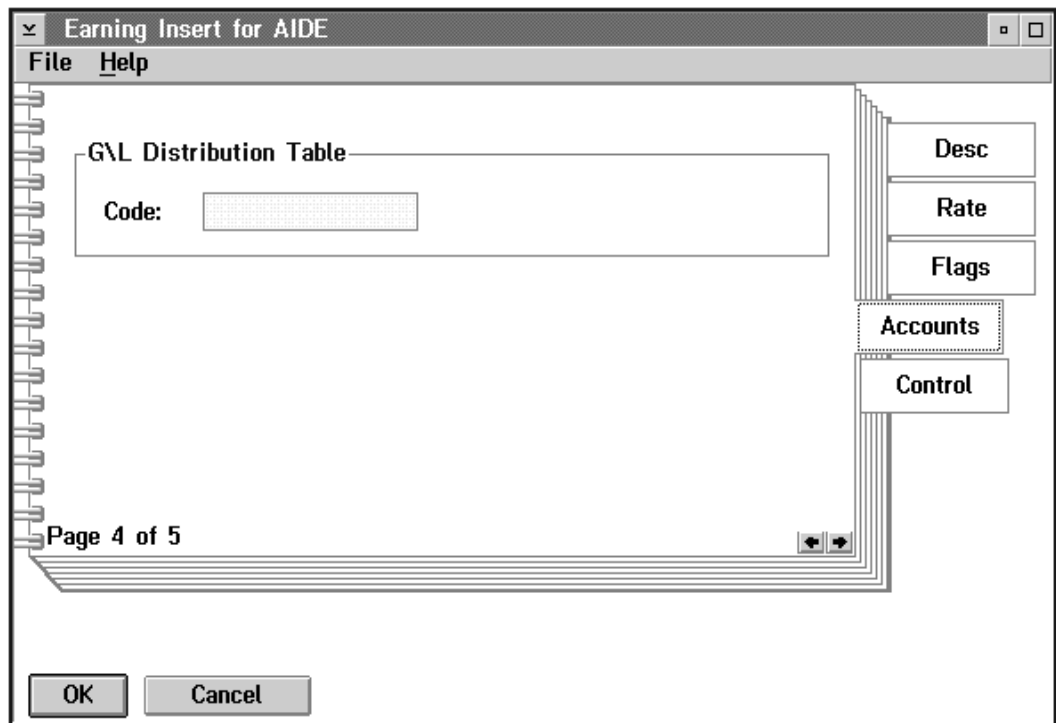
The following table gives a description of the data fields:

| Field | Description |
|---|--|
| Earning Usage Control | This field contains buttons that determine how the earning will be treated at the employee level. |
| Must Turn On for Employee | When this field is pressed, the earning will only be used for an employee when the earning is specifically set for an employee. |
| Always On for Employee | When this field is pressed, the earning will always be available for all employees. This button will always prevent employee level modifications of the earning rate settings. |
| May Turn Off for Employee | When this field is pressed the earning is normally available for all employees. In order for an employee not to have access to the earning type it must be specifically disabled for the employee. |
| Allow Modification at Employee Level | This field is used to determine if a rate settings can be modified for the employee. When this box is checked the employee may have modifications to the rate settings. Note - this check box has no effect when the "Always on for Employee" button is pressed. |
| Contra Earning Setting | This field contains fields that are used to determine if hours worked for the earning type will automatically create a transaction that subtracts the equivalent hours worked and amount from another earning type. |
| No Contra | This field turns off any automatic processing. |
| Employee Base | This field will result in the employees declared base earning (please refer to the Employee Payroll Specific information settings) being used for the automatic processing. |
| Other | This field uses the earning specified in the "Other Earning " field for the automatic processing. |

The dialog box allows the following data fields to be input:

| Field | Description |
|------------------------------------|---|
| Earning Dollars | When this field is checked the dollar amount is subject to federal tax, CPP, UIC, Quebec Tax, QPP and WCB. |
| Earning Hours | When this field is checked the earning hours are subject to federal tax, CPP, UIC, Quebec Tax, QPP and WCB. |
| Pay Period Allocation (UIC) | |

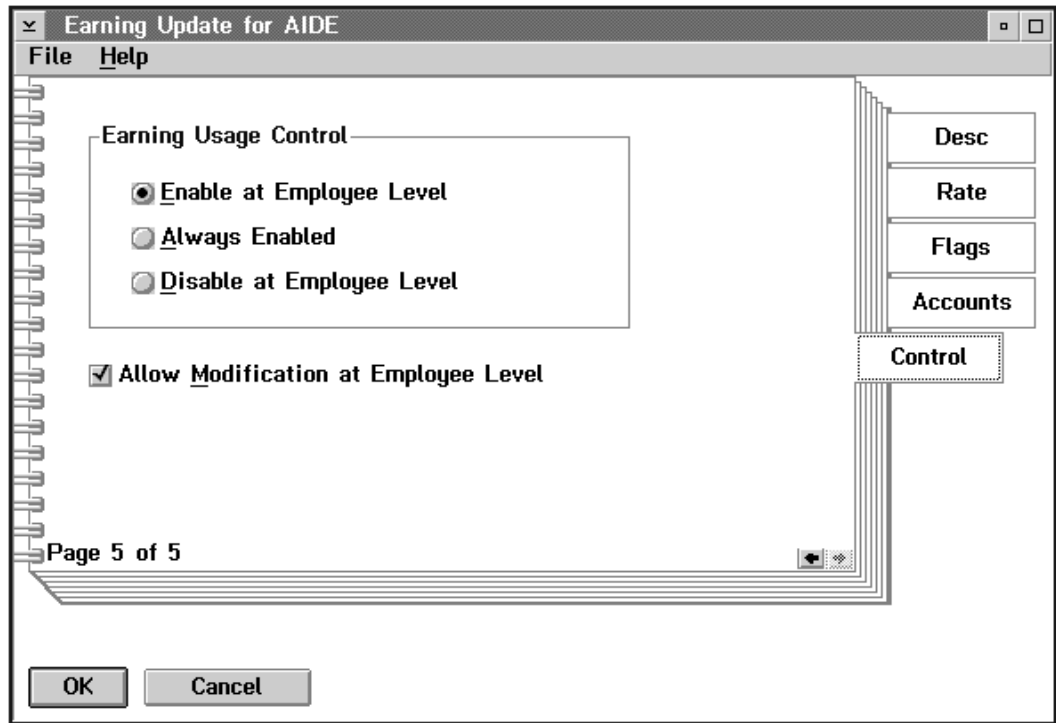
1. Choose the Accounts tab and fill in the appropriate information:



The dialog box allows the following data fields to be input:

| Field | Description |
|--|-------------|
| General Ledger Distribution Table | |

2. Choose the Control tab and fill in the appropriate information:



The dialog box allows the following data fields to be input:

| Field | Description |
|---|---|
| Earning Usage Control | This field is used to control the earning usage. The earning can be enabled at lower level, always enabled or the earning can be disabled at a lower level. |
| Allow Modification at Employee Level | |

3. Select the OK button.

Global Deductions

Global Deduction Types

What Deduction Types do I need?

Global Deduction Types are used to define the categories of company deductions and benefits that will be included in the calculation of an employees pay.

A Deduction Type defines the calculation that will be used to determine the deduction and benefit amounts that apply to the deduction. The Deduction Type can also define the list of earnings, other deductions, or accumulators that will be included in the calculation.

What decides how the calculation is done?

The Suite H/R module and payroll provide over a hundred calculation formulas that can be used to calculate a deduction and/or benefit. Each deduction formula provides a number of parameters that can be used to determine the results of the calculation.

Alternatively, the deduction and/or benefit can be set up as a fixed amount to deduct for each pay. The method can be used when the actual amount is decided independently of the values processed in the pay calculation.

Examples of Deduction Types

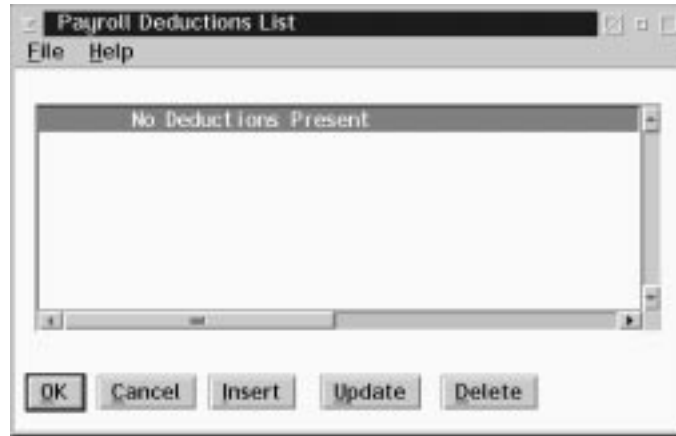
| Field | Description |
|--------------------------------|---|
| Union Dues | This deduction is used to calculate union dues. Normally this deduction type will require a calculation code that will calculate some percentage of the employee earnings that are subject to the union dues deduction. Calculation would be a percentage of earnings. The list of earnings would include regular and overtime wages but would not include expense reimbursement |
| Registered Pension Plan | This Deduction is used to calculate the employee contribution to a pension plan. The deduction type will require a calculation code that uses a list of earnings that are subject to the deduction. The calculation code used may also calculate a benefit for the employee that is the company portion of the contribution. |
| Health Insurance Plan | This Deduction is used to calculate the employee Heath Insurance premium. The calculation may be based on a base rate depending on the employees' age and additional premiums based on the number of dependants that the employee has. The employees earnings do not have to be entered into a deduction calculation. |

Creating The Master Deduction Types

Grand Master Suite Human Resources or payroll allows you to have up to 200 different deduction types. Each type determines a category of deductions for an employee. The DEDUCTIONS choice on the DATA menu is used to access the deduction update function.

Because the Grand Master Suite Human Resources supports date sensitive processing several deductions of each type may be present. Each one will cover a particular date range. When you insert a new deduction with the same number as an existing one you must specify a date range for the new deduction that is later than the date range in use for the existing deduction.

The Deduction List screen is displayed when you select the menu choice. The deduction list screen appears as follows:



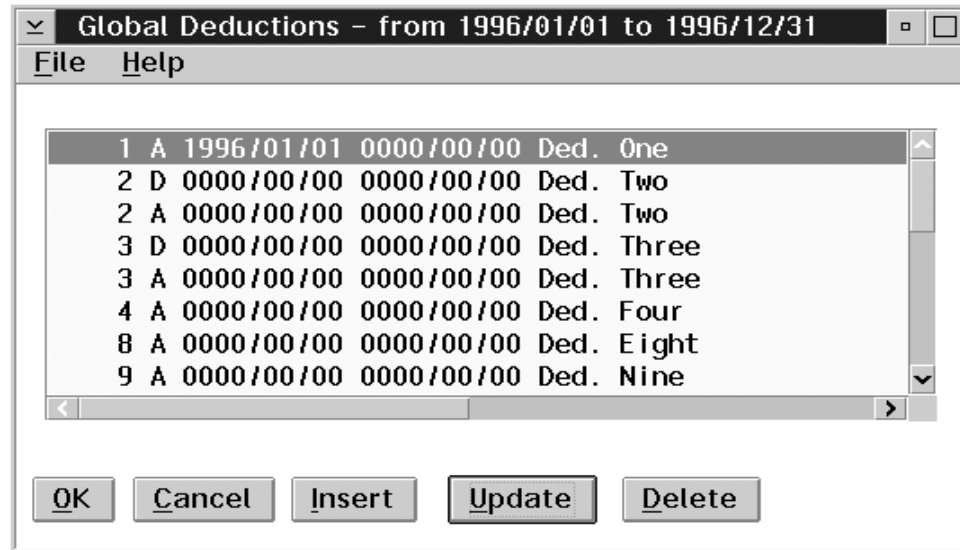
The window title may be either Payroll Deduction List or Global Deduction List depending on whether or not you are sharing the deduction with other payrolls. (Global Deductions are shared between payrolls, Payroll Deductions are not shared).

- OK** The OK button, or the **Save** option in the File menu will save any changes made in the dialog box.
- Cancel** The CANCEL button, or the **Exit** option in the File menu will exit the dialog box without saving any changes.
- Insert** The INSERT button is used to insert a new deduction list.
- Update** The UPDATE button is used to update an existing deduction.
- Delete** The DELETE button is used to delete an existing deduction.

Global Deductions

The **Global Deductions** option is used to assign global deductions to employees.

When the user selects this option the following screen will appear:



The list may contain from left to right the deduction code, the letter “D” if the deduction code has been deleted, date effective from, date effective until, and a description of the deduction code.

Set Date Range

The **Set Date Range** option in the File menu allows the user to change the date range in order to narrow the number of deductions which appear in the list. If a date range has been set, the range selected will appear in the title bar of the dialog box.

Show Dates

If the **Show Dates** option in the File menu is selected the date range when each deduction is effective will appear in the list.

Show Deleted Deductions

If the **Show Deleted Deductions** option in the File menu is selected the deductions that have been deleted will appear in the list. The letter “D” will appear to the left of the deleted deductions.

OK

The OK button will save any changes made in the dialog box.

Esc (exit)

The ESC key, CANCEL button, or **Exit** option in the File menu will exit the dialog box without saving any changes.

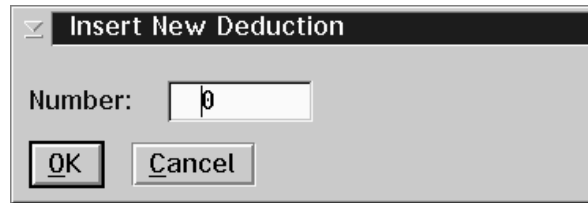
Insert

The INSERT button allows the user to insert global deductions. A description of how to insert new global deductions begins on page 245 .

Update

The UPDATE button allows the user to update global deductions. The following dialog box will appear when the UPDATE button is selected:

The INSERT button is used to add a new deduction type to the list. When this button is pressed a dialog box will appear that asks for the deduction type number. The Insert New Deduction screen appears as follows:

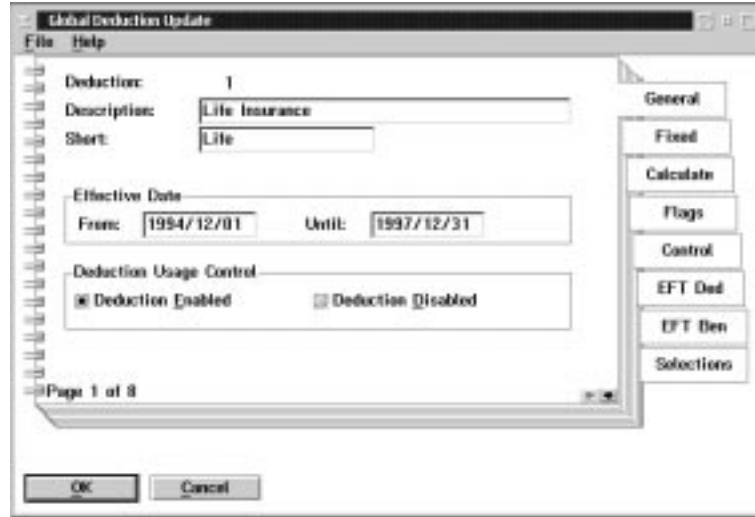


If you enter the number of an existing deduction type that deduction will be retrieved to be updated.

The Global Deduction Update screen contains a notebook with seven pages. Each of these pages contains information that is used for processing deductions.

The GENERAL page contains fields for describing the deduction and setting the effective date range of the deduction type.

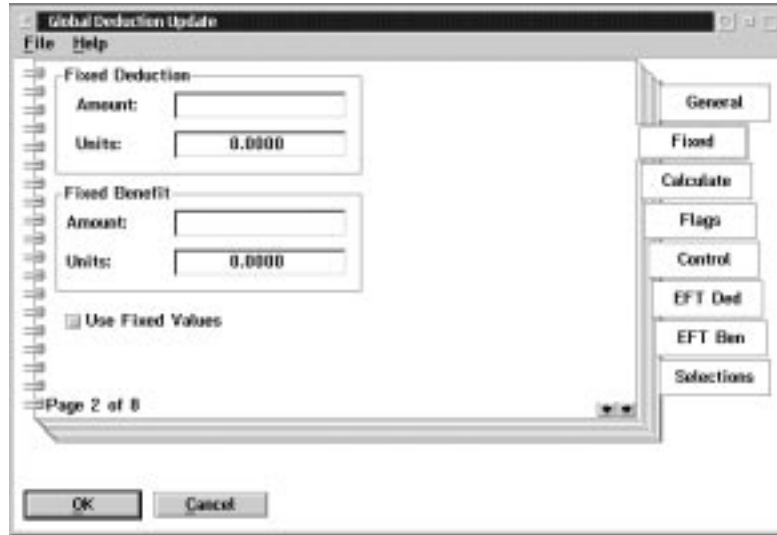
When you select the General tab on the Global Deduction Update the following screen will appear:



The following table gives a description of the screen:

| Field | Description |
|--------------------------------|---|
| Deduction | This field contains the code number of the deduction. |
| Description | The long description is used for report and for descriptions for screen displays. |
| Short | The short description is used on pay statements. |
| From | This field is used to set the starting date of the effective date range for the deduction. |
| Until | This field is used to set the end date of the effective date range for the deduction. |
| Deduction Usage Control | This field contains two buttons that are used to Enable or Disable the uses of the deduction type. When the deduction type is disabled the deduction will not be used for pay processing. |

The Fixed page contains fields that are used to input fixed amount that are used to input fixed amounts for the deduction processing. When you select the Fixed tab on the Deduction Update the following screen will appear:



The following table gives a description of the screen:

| Field | Description |
|-----------------------|--|
| Amount | This field contains the values that should be accumulated for an employee for each period based on the values in the Evaluation box. |
| Unit | This field contains the values that should be accumulated for an employee for each period based on the values in the Evaluation box. |
| Evaluation Box | This field contains the Use Fixed Values check box. |

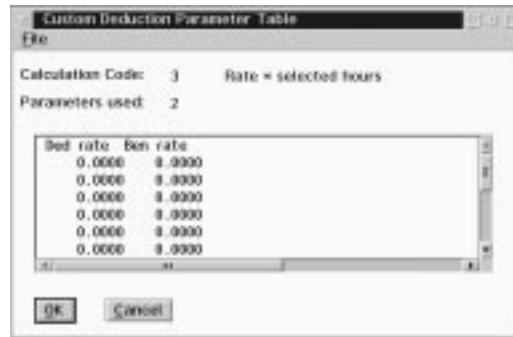
The Calculate page is used to set the values for the calculation that will be used to determine the amounts to be added to the deduction. When you select the Calculate tab on the Global Deduction Update the following screen will appear:



The following table gives a description of the screen:

| Field | Description |
|--------------------------|--|
| Calculation Code | This field is used to enter the number of the calculation codes that will be used to calculate the value to add to the deduction. A list of calculation codes can be displayed by pressing the F8 key when the Calculation Code field is selected. |
| Parameter Table | This field is used to enter the name of a parameter table. A list of the tables already defined can be obtained by pressing the F8 key when the Parameter field is selected. |
| Parameter Group | This field is used to enter the default group (row) for the deduction type. |
| Custom Parameters | This field is used to determine if a Named Table or a Custom Parameter table will be used in the calculation for the deduction type. |
| Table Parameters | This field is used to call up a screen that is used to enter the custom table parameters. |
| Item Parameters | This field is used to update the values. |
| Selection | This field is used to call up a screen that can be used to select the earning, deductions, or deduction that will summarized for this calculation code. |

The TABLE PARAMETERS button is used to call up a screen that is used to enter the custom table parameters. The screen shows a list of the values in the parameter table. The Custom Deduction Parameter Table appears as follows:



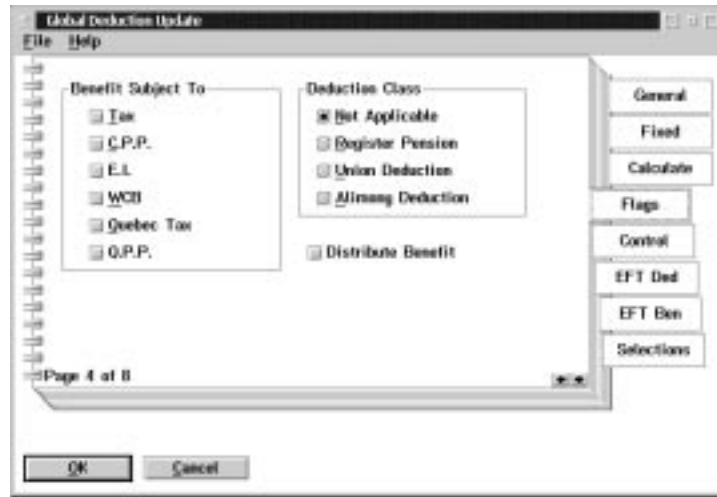
The values in a row of the list are updated by double-clicking on the row. This will display a screen that is used to update the individual parameters in the row. The employee deduction set up will select a particular Group (row) in the table to use for the employee calculation.

The SELECTION button is used to call up a screen that can be used to select the earnings, deductions, benefit or accumulators that will be summarized for this calculation code. The Payroll Earnings Selection screen appears as follows:



The calculation code requirements decides the type of list that will be displayed. Items in the list are selected by clicking on them with the mouse. Any number of items can be selected from the list. You may also use the Include/Exclude buttons to indicate an exclude list rather than an include list. An exclude list selects only the items that are NOT to be included for the calculation.

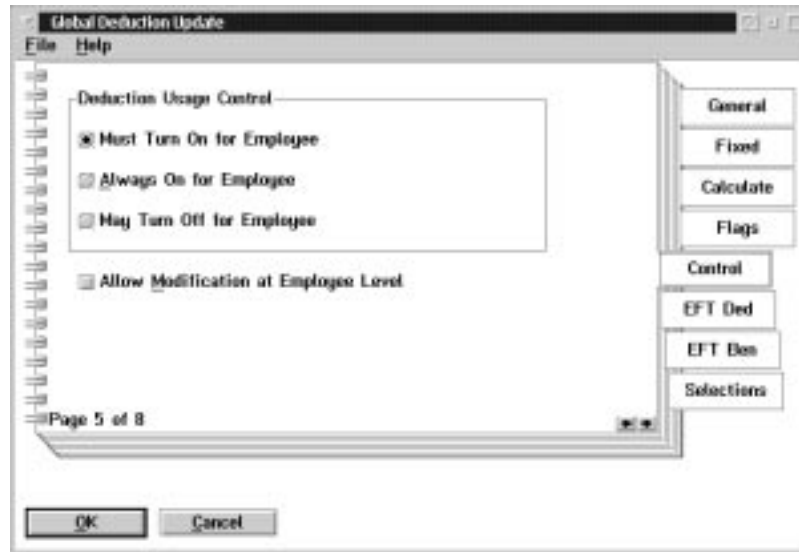
The Flags page contains settings that are used to control the use of the deduction type. When you select the Flag tab on the Global Deduction Update the following screen will appear:



The following table gives a description of the screen:

| Field | Description |
|---------------------------|--|
| Benefit Subject To | This field is used to indicate what statutory deductions that the benefit calculated by this deduction type is subject to. |
| Deduction Class | This field is used to indicate the class of the deduction for Revenue Canada tax treatment. |
| Distribute Benefit | This field allows you to distribute a benefit |

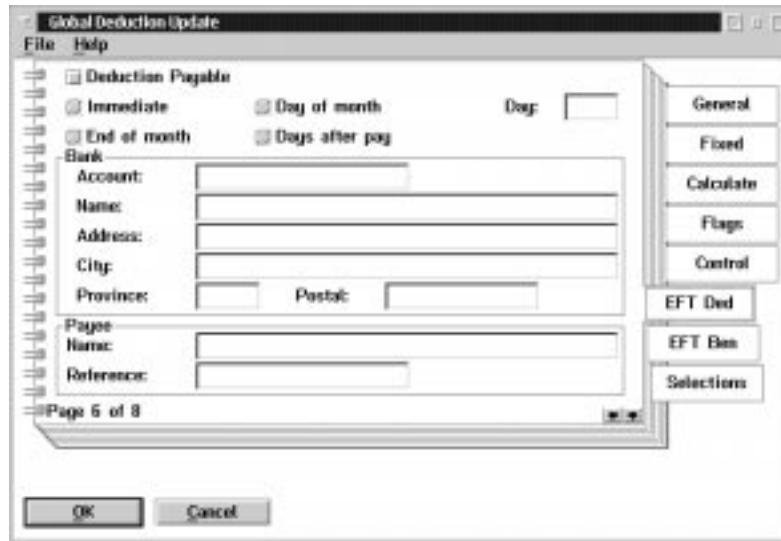
The Control page is used to set the conditions for the use of the deduction type by employees. When you select the Control tab on the Global Deduction Update the following screen will appear:



The following table gives a description of the screen:

| Field | Description |
|---|--|
| Deduction Usage Control | This field contains three buttons that determine the default processing of the deduction for the employee. |
| Requires Enable for Employee | This field sets the option that requires that the deduction be enabled at the employee level before the deduction will affect the employee's pay. |
| Always Enabled for Employee | This field sets the option that the deduction will always affect all employees pay. This option prevents the deduction from being tuned off for an employee. |
| Required Disable for Employee | This field sets the option that the deduction will affect the employees pay unless the deduction is disabled at the employee level. |
| Allow Modification at Employee Level | This field allows the selection of or changes to parameter values for the calculation of the deduction. If this is not turned on no changes to the default parameters are allowed at the employee level. |

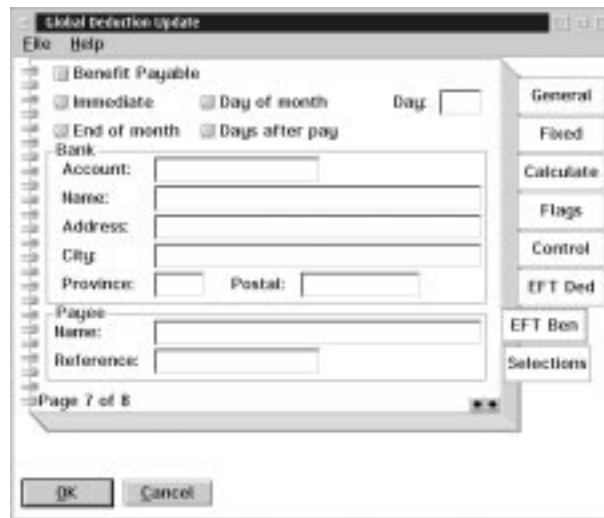
The EFT Deduction page allows the entry of data used for processing of the deduction amounts by the Electronic Funds Transfer module. When you select the EFT Ded tab on the Global Deduction Update the following screen will appear:



The following table gives a description of the screen:

| Field | Description |
|--------------------------|---|
| Deduction Payable | This field is used to indicate that the deduction amount may be processed with the Electronic Funds Transfer module. If this box is not checked no EFT processing will occur for the deduction. |
| Immediate | This field is used to determine the date to pay out the amounts. |
| End of Month | This field is used to determine the date to pay out the amounts. |
| Day of Month | This field is used to determine the date to pay out the amounts. When the Day of Month button is selected the day field must contain a value to use for the number of days or the day of the month. |
| Days after Pay | This field is used to determine the date to pay out the amounts. When the Days after Pay button is selected the day field must contain a value to use for the number of days or the day of the month. |
| Bank | This field contains the bank account number and the name and address of the bank that will receive the funds transfer. If these fields are not present no deposit will be prepared. |
| Payee | This field contains the name of the payee for the amount and a reference for the deposit. |

The EFT Benefit Page allows the entry of data used for the processing of the benefit amounts by the Electronic Funds Transfer Module. When you select the EFT Ben tab on the Global Deduction Update the following screen will appear:



The following table gives a description of the screen:

| Field | Description |
|------------------------|---|
| Benefit Payable | This field is used to indicate that the benefit amount may be processed with the Electronic Funds Transfer module. If this box is not checked no EFT processing will occur for the deduction. |
| Immediate | This field is used to determine the date to pay out the amounts. |
| End of Month | This field is used to determine the date to pay out the amounts. |
| Day of Month | This field is used to determine the date to pay out the amounts. When the Day of Month button is selected the day field must contain a value to use for the number of days or the day of the month. |
| Days after Pay | This field is used to determine the date to pay out the amounts. When the Days after Pay button is selected the day field must contain a value to use for the number of days or the day of the month. |
| Bank | This field contains the bank account number and the name and address of the bank that will receive the funds transfer. If these fields are not present no deposit will be prepared. |
| Payee | This field contains the name of the payee for the amount and a reference for the deposit. |



When the benefit bank account and payee information is blank the benefit deposit will be made using the information from the EFT Ded page.

The Selections tab allows you to Select Positions, Categories, Provinces for the Global Deduction Update.

When you select the Selections tab on the Global Deduction Update the following screen will appear:



Select Position The select position button allows you to select a position.

Select Categories The select categories button allows you to select a category.

Select Provinces The select provinces button allows you to select a province

Include When the include check box is checked it will be included in the update.

Exclude When the exclude check box is checked it will be excluded in the update.

Global Accumulators

Global Accumulator Types

What is an Accumulator used For?

Accumulator types are used to define the method used to accumulate values based on other values processed during the payroll calculation.

Examples of Accumulator Types

| Value to Accumulate | Description |
|-----------------------|--|
| Vacation Entitlements | Vacation entitlements are commonly calculated at a percentage of the earnings that are subject to vacation pay. Different base rates apply in different provinces. For example: in Manitoba vacation entitlements are accumulated at a rate of 4% on regular earnings. |
| Sick Pay | Sick pay entitlements may be calculated as a percentage of the total amount of a selected list of earnings. |
| Seniority | Seniority is commonly calculated as the total hours worked for a selected list of earning types. |

Creating the Master Accumulator Types

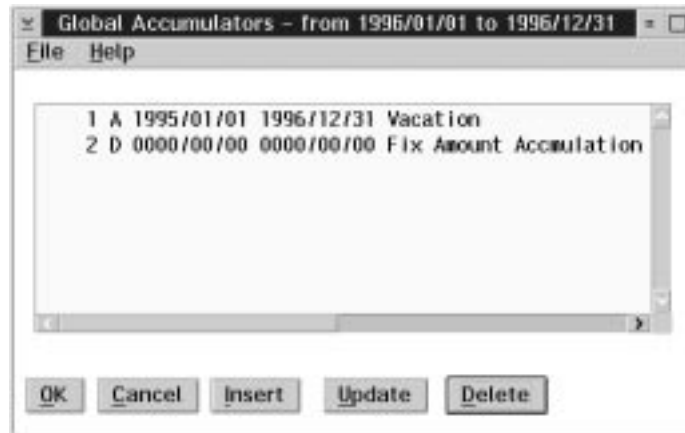
GrandMaster Suite Payroll allows you to have up to 200 different accumulator types. Each type determines a category of accumulator for an employee. The ACCUMULATORS choice on the DATA menu is used to access the accumulator update function.

Because the GrandMaster Suite payroll supports date sensitive processing several accumulators of each type may be present. Each one will cover a particular date range. When you insert a new accumulator with the same number as an existing one you must specify a date range for the new accumulator that is later than the date range in use for the existing accumulator.

Global Accumulators

The **Global Accumulators** option is used to assign global accumulators to employees.

When the user selects this option the following screen will appear:



The list may contain from left to right the accumulator code, the letter “D” if the accumulator code has been deleted, date effective from, date effective until, and a description of the accumulator code.

Set Date Range The **Set Date Range** option in the File menu allows the user to change the date range in order to narrow the number of accumulators which appear in the list. If a date range has been set, the range selected will appear in the title bar of the dialog box.

Show Dates If the **Show Dates** option in the File menu is selected the date range when each accumulator is effective will appear in the list.

Show Deleted Accumulators If the **Show Deleted Accumulators** option in the File menu is selected the accumulators that have been deleted will appear in the list. The letter “D” will appear to the left of the deleted accumulators.

OK The OK button will save any changes made in the dialog box.

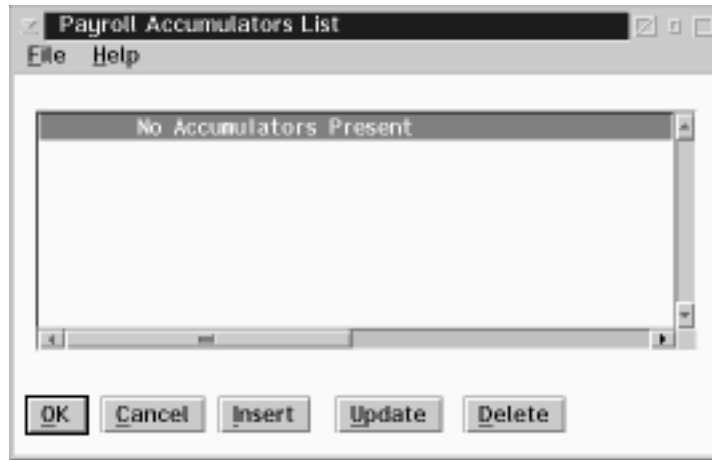
Esc (exit) The ESC key, CANCEL button, and **Exit** option from the File menu will exit the dialog box without saving any changes.

Insert The INSERT button allows the user to insert global accumulators.

Update The UPDATE button allows the user to update global accumulators. The following dialog box will appear when the UPDATE button is selected:

Delete The DELETE button allows the user to delete global accumulators.

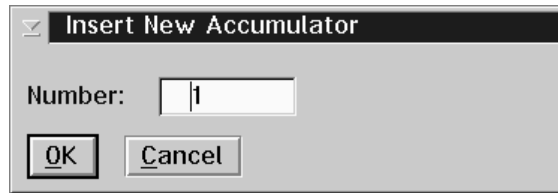
The Accumulator List screen is displayed when you select the menu choice. The Accumulator list screen appears as follows:



The window title may be either Payroll Accumulators List or Global Accumulators List depending on whether or not you are sharing the accumulators with other payrolls. (Global Accumulators are shared between payrolls, Payroll Accumulators are not shared).

- OK** The OK button, or the **Save** option in the File menu will save any changes made in the dialog box.
- Cancel** The CANCEL button, or the **Exit** option in the File menu will exit the dialog box without saving any changes.
- Insert** The INSERT button is used to insert a new accumulator list.
- Update** The UPDATE button is used to update an existing accumulator list.
- Delete** The DELETE button is used to delete an existing accumulator list.

The INSERT button is used to add a new accumulator type to the list. When this button is pressed a dialog box will appear that asks for the accumulator type number. The Insert New Accumulator screen appears as follows:

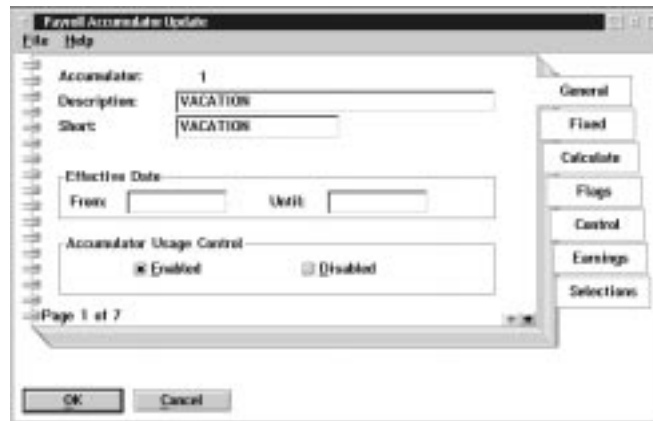


If you enter the number of an existing accumulator type that accumulator will be retrieved for update.

The Accumulator Update screen contains a notebook with six pages. Each of these pages contains information that is used for processing of accumulators.

The General page contains fields for describing the accumulator and setting the effective date range of the accumulator type.

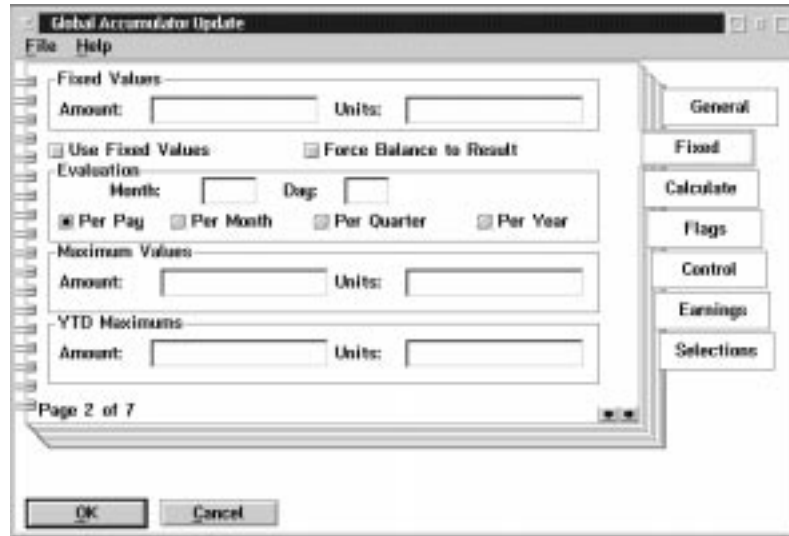
When you select the General tab on the Global Accumulator Update the following screen will appear:



The following table gives a description of the screen:

| Field | Description |
|----------------------------------|---|
| Accumulator | This field contains the code number of the accumulator. |
| Description | The long description is used for report and for descriptions for screen displays. |
| Short | The short description is used on pay statements. |
| From | This field is used to set the starting date of the effective date range for the accumulator. |
| Until | This field is used to set the end date of the effective date range for the accumulator. |
| Accumulator Usage Control | This field contains two buttons that are used to Enable or Disable the uses of the accumulator type. When the accumulator type is disabled the accumulator will not be used for pay processing. |

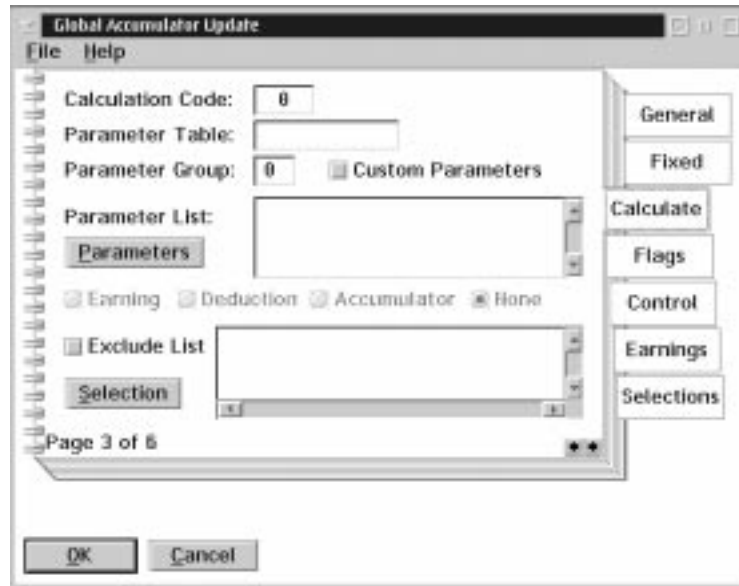
The Fixed page contains fields that are used to input fixed amounts for the accumulator processing. When fixed amounts are used the amounts given will be processed for each pay period. When you select the Fixed tab on the Global Accumulator Update the following screen will appear:



The following table gives a description of the screen:

| Field | Description |
|--------------------------------|---|
| Amount | This field contains the values that should be accumulated for an employee for each period based on the values in the Evaluation box. |
| Unit | This field contains the values that should be accumulated for an employee for each period based on the values in the Evaluation box. |
| Evaluation Box | This field contains the Use Fixed Values check box. When this box is checked the pay roll will process the fixed amounts for the accumulator according to the Per Pay, Per Month, per Quarter or Per Year button settings. |
| Force Balance to Result | When this check box is "ticked" the balance of the accumulator is set to the values in the fixed value fields. This option is normally used when the accumulator is set to some value at the start of a period. (i.e., Sick entitlement of 2 days/quarter). |
| Maximum Values | This field contains fields that can be used to restrict the maximum values that can be accumulated with the accumulator type. |
| Amount | This fields restricts the amounts accumulated to the maximum value in the field. If the field contains zero(blank) the accumulator is not restricted to a maximum value. |
| Unit | This field restricts the units accumulated to the maximum value in the field. If the field contains zero (blank) the accumulator is not restricted to a maximum value. |

The Calculate page is used to set the values for the calculation that will be used to determine the amounts to be added to the deduction. When you select the Calculate tab on the Global Accumulator Update the following screen will appear:



The following table gives a description of the screen:

| Field | Description |
|--------------------------|---|
| Calculation Code | This field is used to enter the number of the calculation code that will be used to calculate the value to add to the accumulator. A list of calculation codes can be displayed by pressing the F8 key when the Calculation Code field is selected. |
| Parameter Table | This field is used to enter the name of a parameter table. A list of the tables already defined can be obtained by pressing the F8 key when the Parameter field is selected. |
| Parameter Group | This field is used to enter the default group (row) for the deduction type. |
| Custom Parameters | This field is used to determine if a Named Table or a Custom Parameter table will be used in the calculation for the deduction type. |
| Parameters | This field is used to call up a screen that is used to enter the custom parameters. |
| Selection | This field is used to call up a screen that can be used to select the earning, deductions and benefit accumulators that will summarized for this calculation code. |

The TABLE PARAMETERS button is used to call up a screen that is used to enter the custom table parameters. The screen shows a list of the values in the parameter table. The Custom Deduction Parameter Table appears as follows:



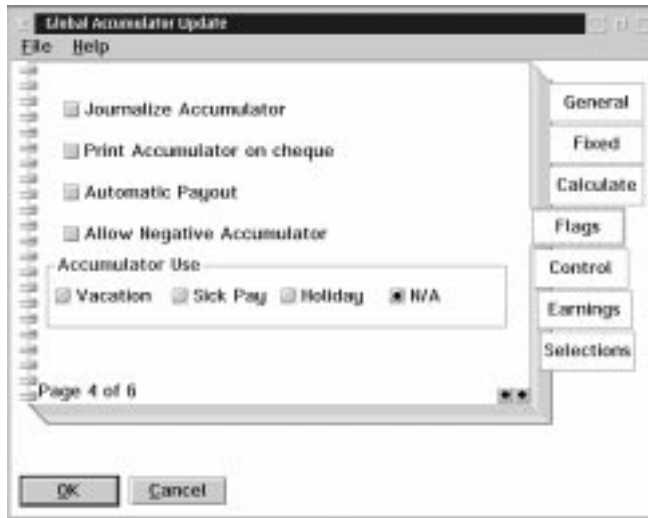
The values in a row of the list are updated by double-clicking on the row. This will display a screen that is used to update the individual parameters in the row. The employee deduction set up will select a particular Group (row) in the table to use for the employee calculation.

The SELECTION button is used to call up a screen that can be used to select the earnings, deductions, and benefits or accumulators that will be summarized for this calculation code. The Payroll Earnings Selection screen appears as follows:



The calculation code requirements decides the type of list that will be displayed. Items in the list are selected by clicking on them with the mouse. Any number of items can be selected from the list. You may also use the Include/Exclude buttons to indicate an exclude list rather than an include list. An exclude list selects only the items that are NOT to be included for the calculation.

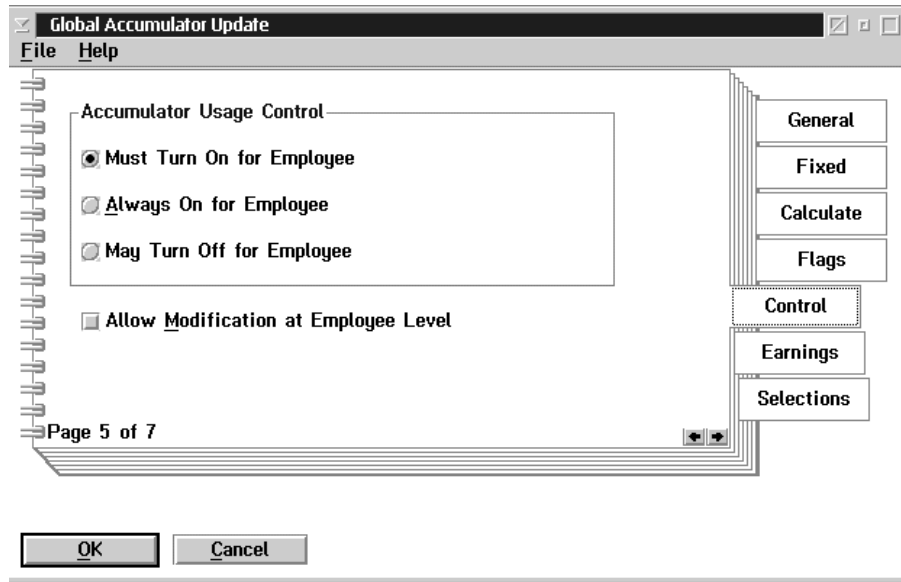
The FLAGS page contains settings that are used to control the use of the accumulator type. When you select the Flag tab on the Global Accumulator Update the following screen will appear:



The following table gives a description of the screen:

| Field | Description |
|------------------------------------|--|
| Journalize Accumulator | This field is used to indicate that you want the values added to our subtracted from the accumulator type to be included in the pay roll journal entry. |
| Print Accumulator on cheque | This field is used to indicate that you want the value of the accumulator to be printed on the cheque stub. |
| Automatic Pay Out | This field is used to indicate that you want any amounts added to the accumulator during the pay calculation to be immediately paid out using the prime earning set on the Earnings Page. |
| Allow Negative Accumulator | This field indicates that you want the accumulator to be allowed to be negative when subtracting amounts from the accumulator. |
| Accumulator Use | This set of radio buttons allows you to indicate the primary purpose of the accumulator. The value set is used by the Human Resource system to determine which accumulators contain entitlements data. |

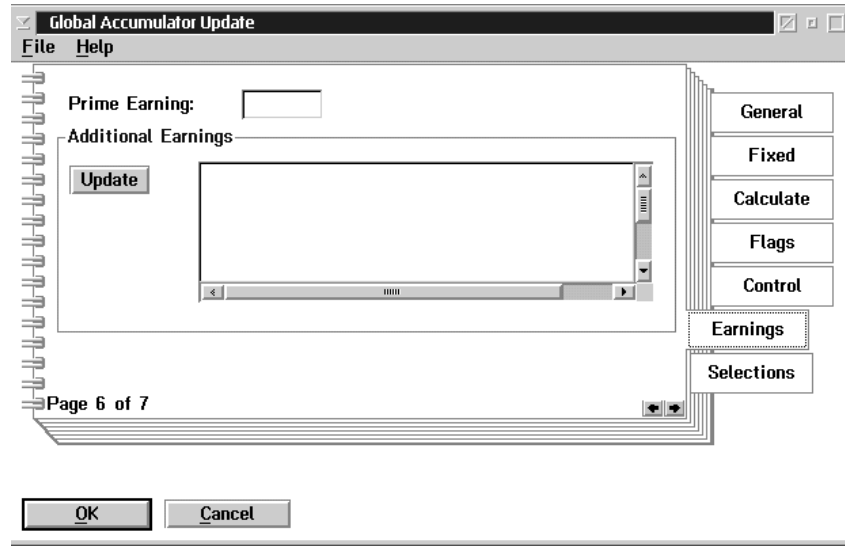
The Control Page is used to set the conditions for the use of the deduction type by employees. When you select the Control tab on the Global Accumulator Update the following screen will appear:



The following table gives a description of the screen:

| Field | Description |
|---|--|
| Accumulator Usage Control | This field contains three buttons that determine the default processing of the deduction for the employee. |
| Requires Enable for Employee | This field sets the option that requires that the deduction be enabled at the employee level before the deduction will affect the employee's pay. |
| Always Enabled for Employee | This field sets the option that the deduction will always affect all employees pay. This option prevents the deduction from being turned off for an employee. |
| Required Disable for Employee | This field sets the option that the deduction will affect the employees pay unless the deduction is disabled at the employee level. |
| Allow Modification at Employee Level | This field allows the section of or changes to parameter values for the calculation of the accumulator. If this is not turned on no changes to the default parameters are allowed at the employee level. |

The Earnings page contains fields that are used to set the Prime Earning for an accumulator type and to set up a list of additional earnings for an accumulator type. When you select the Earnings tab on the Global Accumulator Update the following screen will appear:



The following table gives a description of the screen:

| Field | Description |
|----------------------------|--|
| Prime Earning | This earning number is used for automatic payout of the accumulator. |
| Additional Earnings | Any earnings in this list will decrement the accumulator when amounts are paid using the earnings. |

Update

The Update button displays an earning selection list that allows you to make changes for the additional earnings.

When the selections tab is chosen the following screen will appear:

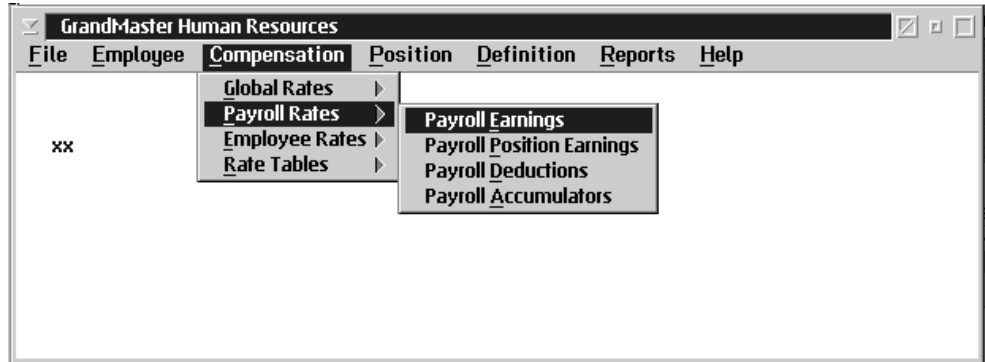


The selections set up with this screen will limit the application of the accumulator to the employees that match the selections made.

If a province list containing "AB, BC, SK" is selected only the employees with a province matching one in the list will have the accumulator evaluated.

Payroll Rates


Selecting the Payrolls Rates option causes the following submenu to appear:



The options available to the user in the Payroll Rates sub menu are:

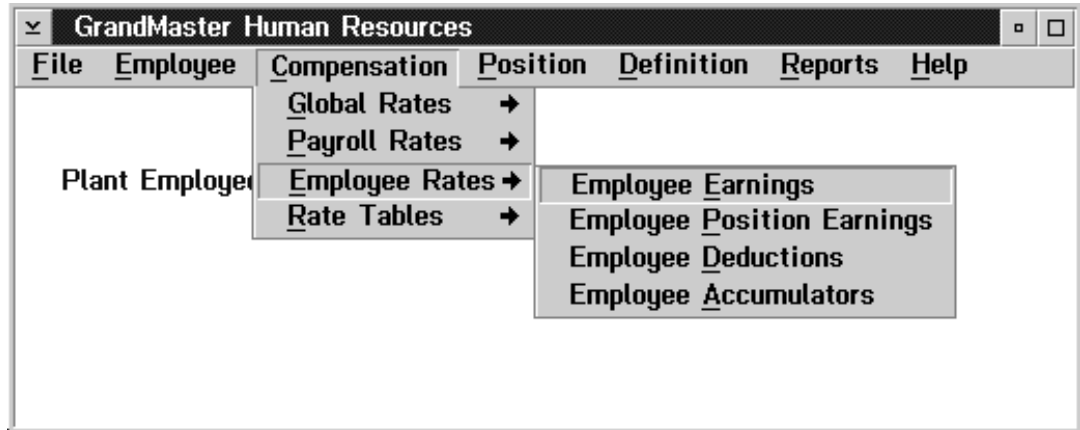
- Payroll Earnings
- Payroll Position Earnings
- Payroll Deductions
- Payroll Accumulators

Please refer to pages 159-194 for more information on Payroll Earnings, Position Earnings, Deductions and Accumulators.

 Payroll Rates pertain to all Earnings, Positions, Earnings, Deductions and Accumulators setup in a specific payroll.

Employee Rates

The types of **Earning Rates** will be displayed in the sub menu when this option is selected:



The Employee Rates options available to the user are:

- Employee Earnings
- Employee Position Earnings
- Employee Deductions
- Employee Accumulators

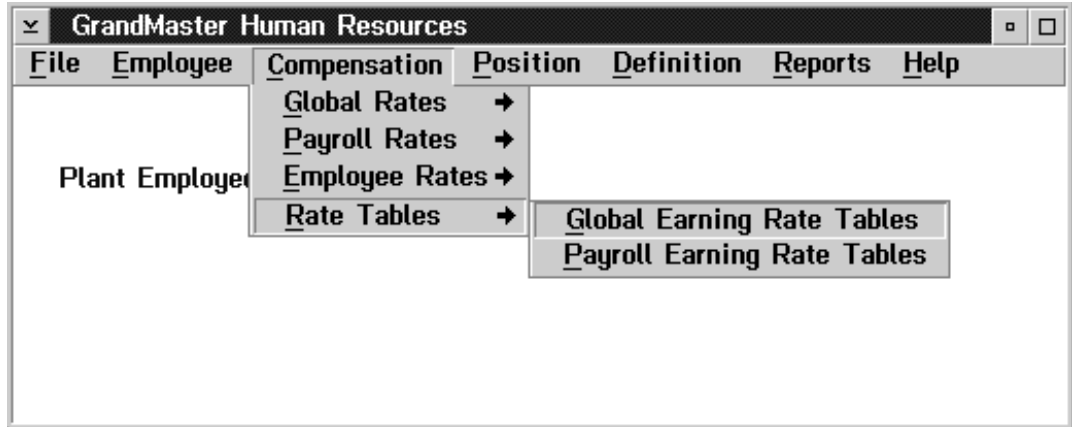
Please refer to pages 159-194 for more information on Employee Earnings, Position Earnings, Deductions and Accumulators.



Employee Rates pertain to all Earnings, Positions, Earnings, Deductions and Accumulators setup for a specific employee.

Rate Tables

When the **Rate Tables** option is selected the following sub menu will appear:



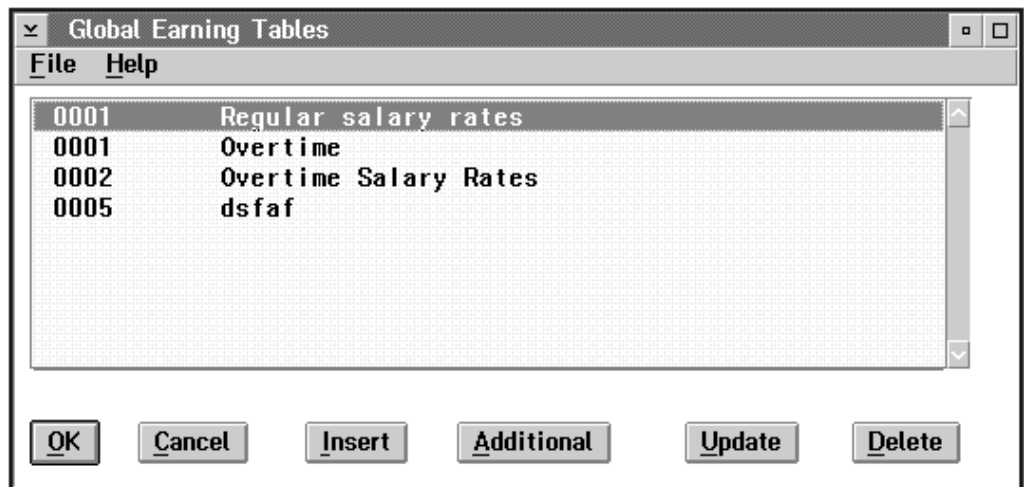
The option available to the user in the Rate Tables sub menu are:

- Global Earning Rate Tables
- Payroll Earning Rate Tables

Global Earning Rate Tables

Rate tables set up in the **Global Earning Rate Tables** option will apply to all payrolls in the GrandMaster Suite system.

When the **Global Earning Rate Tables** option is selected the following dialog box will appear:



If no global rate table codes have been previously defined the list will appear empty. The list contains the global earning table code and a description of the code to the right.

OK The OK button will save any changes made in the dialog box.

Esc (exit) The ESC key, CANCEL button, or **Exit** option from the File menu will exit the dialog box without saving any changes.

Insert The INSERT button allows the user to insert a new global earning rate.

Additional The ADDITIONAL button allows the user to insert another global earning rate for the currently selected code.

Update The UPDATE button allows the user to update the global earning rate currently selected by the selection bar.

Delete The DELETE button allows the user to delete the global earning rate currently selected by the selection bar.

Defining a Global Earning Rate Table

When the user inserts a new rate table or update an existing rate table the following screen will appear:

| | P1 | Rate | Limit |
|----------|----------------------|---------------------------------------|---|
| Step 1: | <input type="text"/> | <input type="text" value="12.30000"/> | <input type="text" value="90.00000"/> |
| Step 2: | <input type="text"/> | <input type="text" value="12.45000"/> | <input type="text" value="365.00000"/> |
| Step 3: | <input type="text"/> | <input type="text" value="13.00000"/> | <input type="text" value="999999.00000"/> |
| Step 4: | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Step 5: | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Step 6: | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Step 7: | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Step 8: | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Step 9: | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Step 10: | <input type="text"/> | <input type="text"/> | <input type="text"/> |

OK Cancel Table Row #: 1

The following table contains descriptions of the data fields in the dialog box:

| Field | Description |
|-----------------------------------|---|
| Code | The rate code is entered in this field. |
| Description | A description of the rate code must be entered into this field. |
| Date Range From | This field is used to indicate the effective start date of the rate table. |
| Date Range To | This field is used to indicate the effective end date of the rate table. |
| Table Overrides Base Rates | If this field is checked the rate table entries will override an existing employee rate if the coordinates of the rate table also exist on the employee record. |
| Rate Table List | Up to 200 can be set up. To the right of each row number may be up to 10 rates. Highlight the row to be completed or updated and double click to call up the entry screen for the insertion of rates. |

Setting Up Rate Tables

Up to 200 different rate tables can be set up for each type of pay rate.

When the user double clicks on a row on the rate table list the following screen will appear:

| | P1 | Rate | Limit |
|----------|----|----------|---------------|
| Step 1: | | 12.30000 | 90.00000 |
| Step 2: | | 12.45000 | 365.00000 |
| Step 3: | | 13.00000 | 9999999.00000 |
| Step 4: | | | |
| Step 5: | | | |
| Step 6: | | | |
| Step 7: | | | |
| Step 8: | | | |
| Step 9: | | | |
| Step 10: | | | |

OK Cancel Table Row #: 1

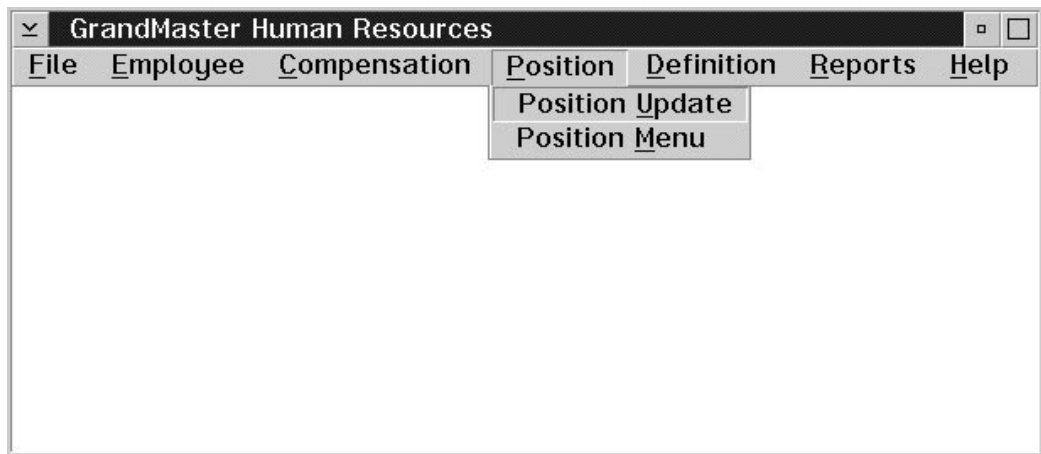
The following table describes the data fields within the dialog box:

| Field | Description |
|--------------------|--|
| P1 | This field is used for special earnings processing (not implemented for future development) |
| Rate | This field is used to input the hourly rate. |
| Limit | This field is used in conjunction with an earning type accumulator. To resolve an employee's rate depending on. For example seniority, if the accumulator is set to accumulate hours and if the limits on the rate table are set for each hourly rate the system will resolve the actual hourly rate of pay based on the hours in the accumulator compared against the limits set in the rate table. |
| Step # | This field is to indicate the column number that the rate will appear in on the rate table. |
| Table Row # | The number in the bottom right hand corner indicates the table row currently selected. This number is for display only. |

POSITION DATA

The **Position** menu from the main menu bar provides facilities that operate on a single position in the GrandMaster Suite Human Resource system.

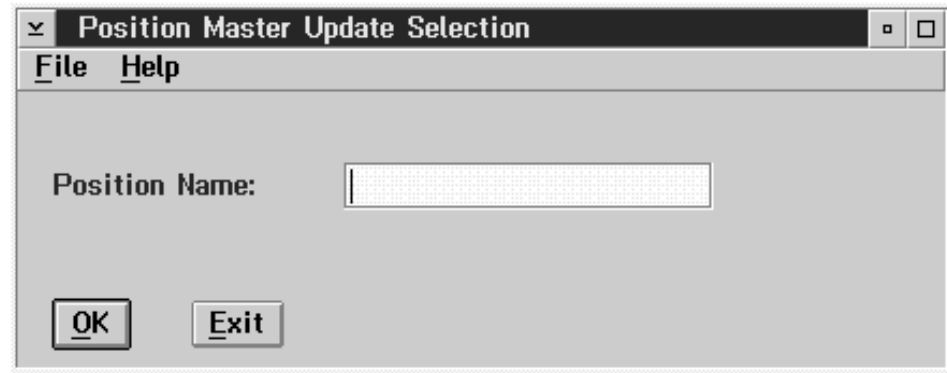
The position menu appears as follows:



These facilities include all position data entry functions that are available in the main menu of Human Resources.

Position Update

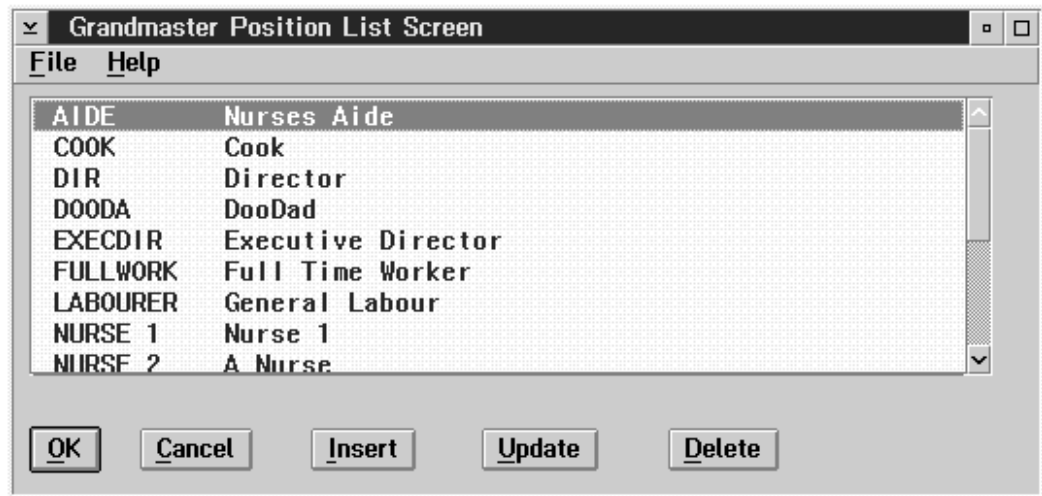
Selecting the **Position Update** option brings up the Position Master Update Selection screen. This screen appears as follows:



The position name must be entered into this dialog box. This can be done by typing the position name in or selecting it from a list of position names.

F8 (list)

Selecting the F8 key, or the **List** option from the File menu will bring up a list of all the defined position names. The list will appear similar to the following:



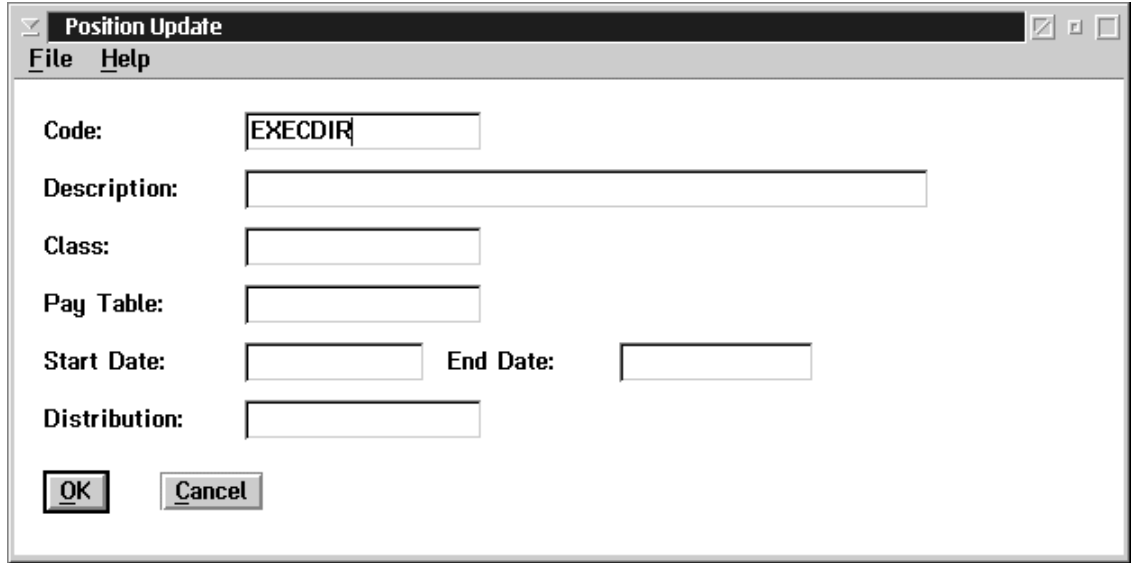
If no position codes have been previously defined the list will be empty.

The screen will list the position codes with their description to the right.

From this screen the user can insert new position codes (using the INSERT button), update defined position codes (using the UPDATE button), or delete defined position codes (using the DELETE button).

Update

The Update button is used to make changes in previously defined position codes. The position code must first be entered into the position code field. The dialog box will appear as follows:



The following data fields require input:

| Field | Description |
|---------------------|--|
| Code | This field contains the code name of the position |
| Desc. | This field contains the description of the position. |
| Class | This field contains the class code of the position. |
| Pay Table | This field contains the pay table used for the position. |
| Start Date | This field contains the starting date used for the position. |
| End Date | This field contains the ending date used for the position. |
| Distribution | This field contains the G/L distribution of the position. |

POSITION

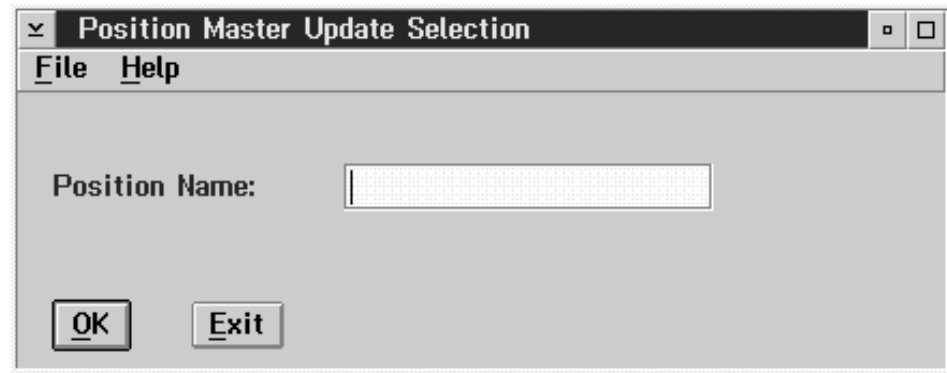
Esc (exit)

The ESC key, CANCEL button, or the **Exit** option from the File menu will exit the dialog box.

Defining a New Position Code

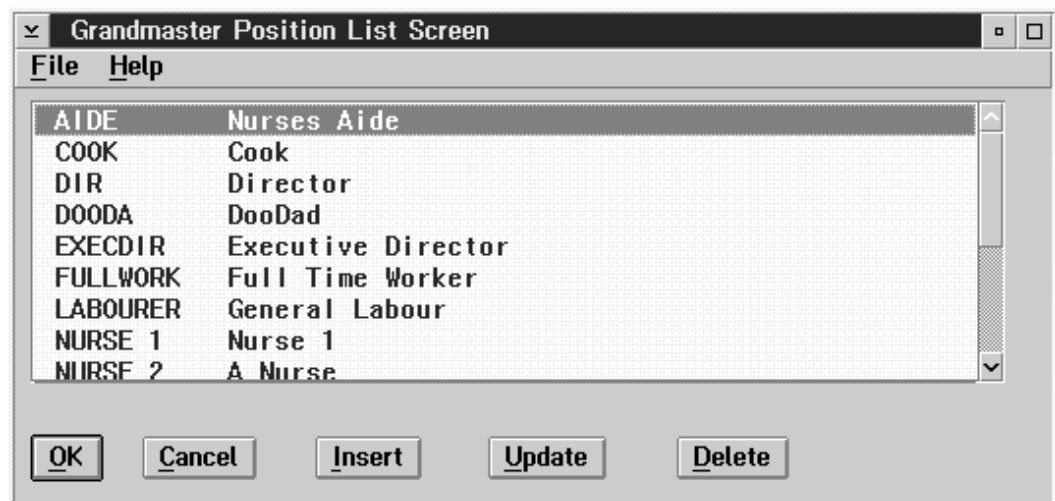
To create a new position code follow these steps:

1. Select the **Position Update** option in the Position menu. The Position Master Update Selection screen will appear as follows:

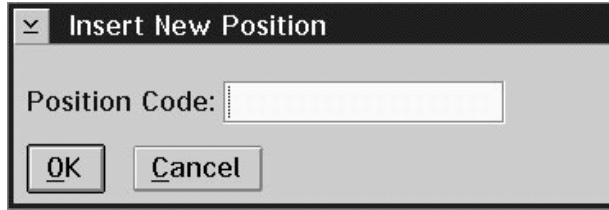


If the user already knows the position code to be defined has not been done so previously, then he/she can enter the position code directly into the Position Master Update Selection dialog box, the **Update** option from the File menu. This action will bypass the Position List Screen and bring up the Position Update dialog box, therefore skip to step five of this section. Otherwise carry on with step two.

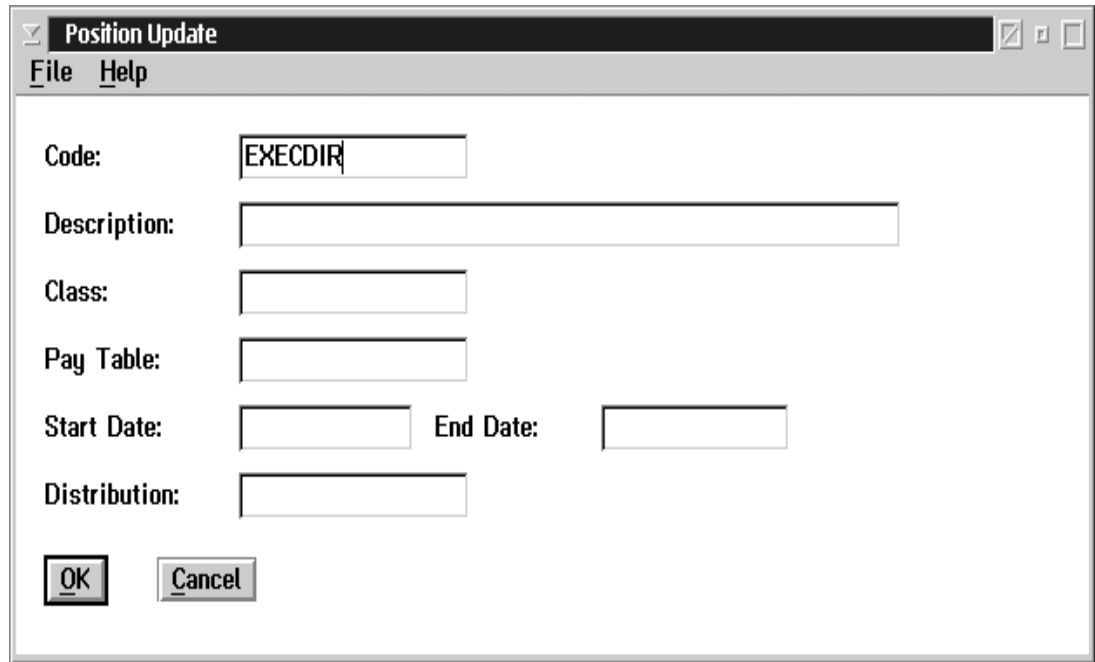
2. Select the F8 key, or the **List** option from the File menu to obtain a list of all the previously defined position codes. The list will appear similar to the following:



3. Select the INSERT button at the bottom of the dialog box.



4. Enter the name of the new position code into the Insert New Position dialog box, then select the OK button. The Position Update screen will appear:



5. Enter the information needed to define the position code that appears in the dialog box.
6. Save the data by selecting the OK button, or **the** Save option from the File menu when all the information has been entered correctly.

POSITION

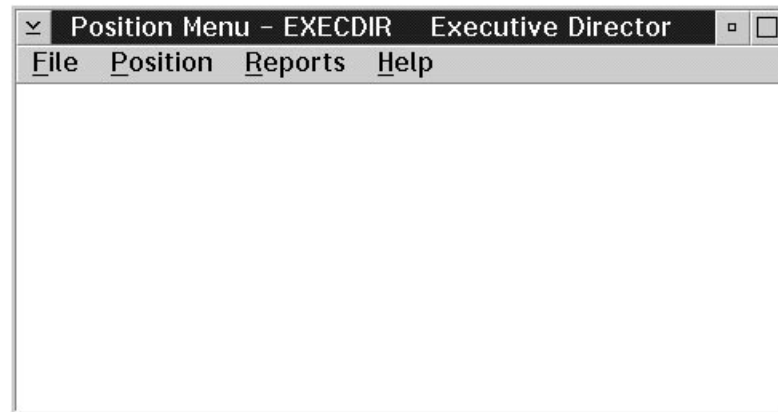
Deleting an Existing Position Code

To delete a previously defined position code follow these steps:

- 1.** Select the **Position Update** option in the Position menu.
- 2.** When the Position Master Update Selection dialog box appears select the F8 key, or the **List** option in the File menu to obtain a list of all defined calendar dates.
- 3.** Move the selection bar to the position code to delete.
- 4.** Select the DELETE button at the bottom of the Position List Screen.
- 5.** A message will appear asking you to confirm the deletion. Select the YES button to delete, or the NO button to cancel the deletion process.

Position Menu

The **Position Menu** option allows the user to access functions that operate on a single position. Selecting this option will bring up a screen with a new menu bar, the menu bar will appear as follows:



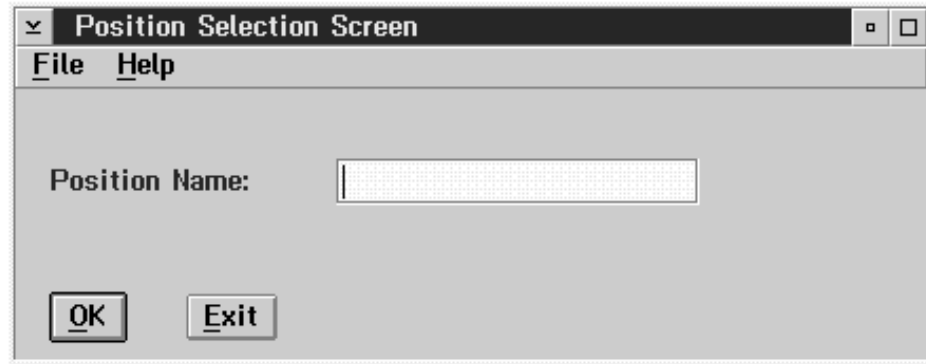
The name of the currently selected position will be displayed in the title bar of the dialog box.

The Position Menu option allows the user to:

- select a position
- update the master file for the current position
- update global pay rates or individual payroll rates for the current position
- update the skills required for the current position
- update the employees assigned to the current position
- update the data tables for the current position

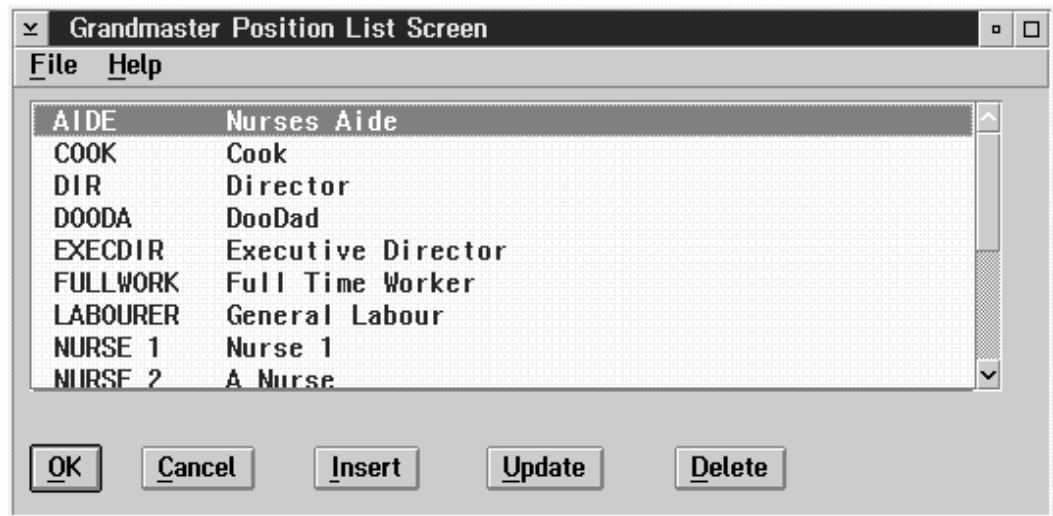
Select Position

The **Select Position** option, available in the File menu, allows the user to select a position for the menu functions to operate.



F8 (list)

The F8 key, or the **List** option in the File menu will bring up a list of the previously defined positions. The dialog box will appear similar to the following:



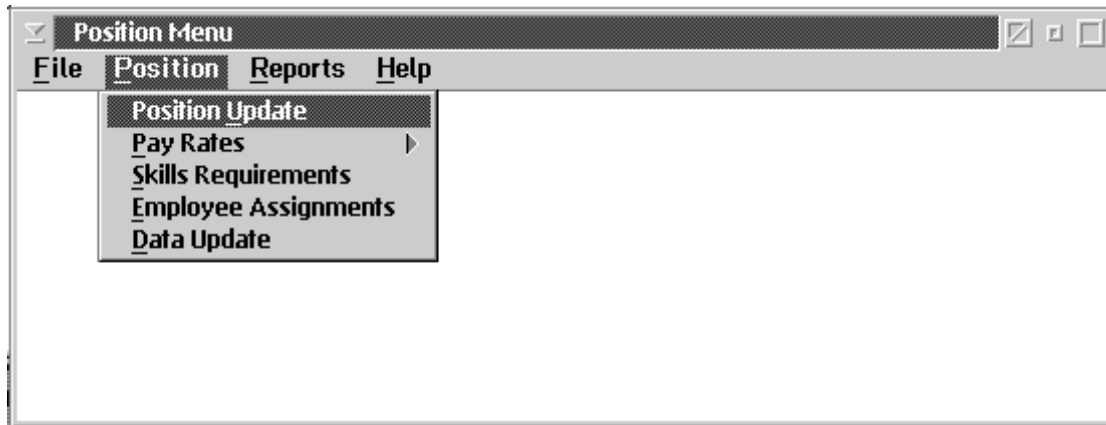
From this dialog box the user can also insert new positions (using the INSERT button, see page 204), update existing positions (using the UPDATE button, see page), and delete existing positions (using the DELETE button, see page 206).

Esc (exit)

The ESC key, CANCEL button, or the **Exit** option in the File menu will exit the dialog box without selecting a position.

Position

The Position sub menu appears as follows:



The following options are available:

- Position Update
- Pay Rates
- Skills Requirements
- Employee Assignments
- Data Update

Position Update

The **Position Update** option in the Position menu allows the user to update the data for the current position master record.

The following dialog box will appear when the user selects the **Position Update** option:

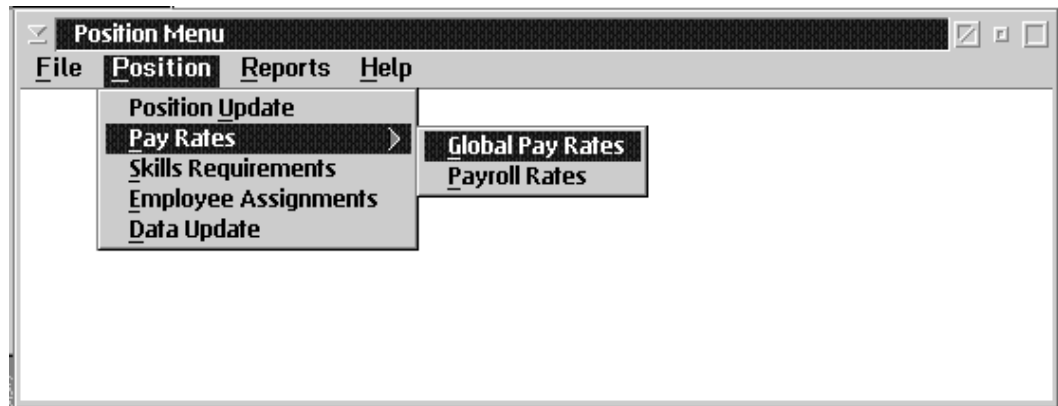
This dialog box contains the following data fields:

| Field | Description |
|------------------------|--|
| Code | This field contains the code name of the position. |
| Name | This field contains the description of the position. |
| Type | This field contains the type code of the position. |
| Class | This field contains the class code of the position. |
| Pay Table | This field contains the pay table used for the position. |
| Start Date | This field contains the starting date for the position. |
| End Date | This field contains the ending date for the position. |
| Distribution | This field contains the general ledger distribution of the position. |
| Hour Allocation | This field contains the hour allocation of the position. |

Pay Rates

The **Pay Rates** option in the Position menu option allows for the selection to enter the global pay rate or individual payroll rate.

The following dialog box will appear when the user selects the **Pay Rates** option:



The following pay rates are available:

- Global Pay Rates
- Payroll Rates

Skills Requirements

The **Skills Requirements** option in the Position menu allows the user to update the skills table for the current position.

The following dialog box will appear when the user selects the **Skills Requirements** option:



The list will appear empty if no skills have been previously defined for the selected date range.

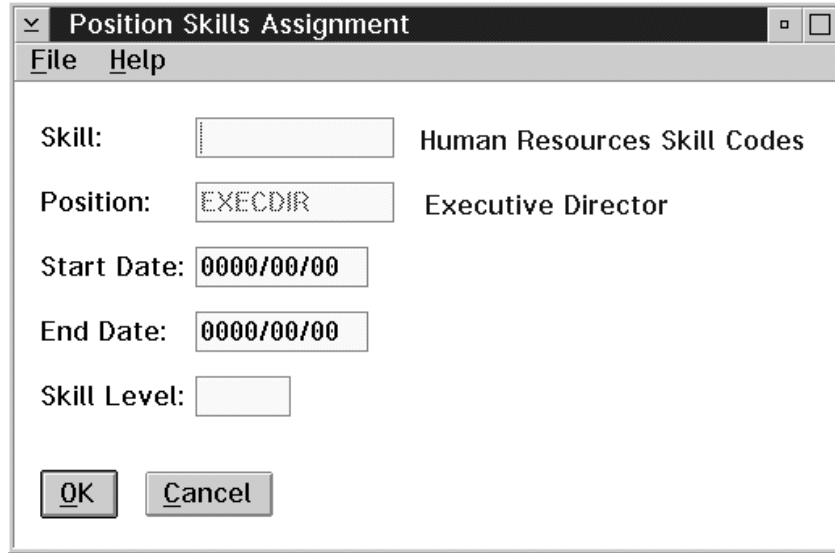
The list contains from left to right the start date, end date, skills code, and description of the skill code.

Set Date Range

The **Set Date Range** option in the File menu allows the user to change the date range in order to change the skills that appear in the list.

Insert Item

The INSERT button, or **Insert Item** option in the File menu allows the user to insert a new skill. The dialog box will appear similar to the following:



The following table gives a description of the data fields within the dialog box:

| Field | Description |
|--------------------|---|
| Skill | This field contains the code name of the skill. |
| Position | This field contains the position code of the position for the skill |
| Start Date | This field contains the starting date of the skill for this position. |
| End Date | This field contains the ending date of the skill for the position. |
| Skill Level | This field contains the level of the skill for this position. |

Update Entry

The UPDATE button, or **Update Entry** option in the File menu allows the user to update the information for the skill currently selected with the selection bar. The dialog box will appear similar to the dialog box that appears for inserting a new skill requirement.

Delete Entry

The DELETE button, or **Delete Entry** option in the File menu will delete the skill currently selected with the selection bar.

Esc (exit)

The ESC key, EXIT button, or **Exit** option in the File menu will exit the dialog box.

POSITION

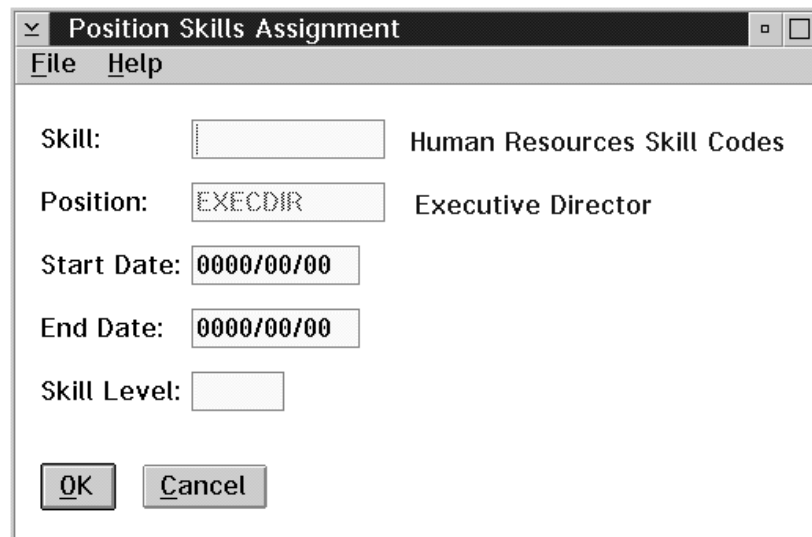
Defining Skill Requirements

To define a new skill requirement for a position do the following:

1. In the main menu screen select the **Position Menu** option in the Position menu.
2. In the position menu screen select the **Skills Requirements** option in the Position menu. A dialog box similar to the following will appear:



3. Select the INSERT button, or the **Insert Entry** option in the File menu. The following dialog box will appear:

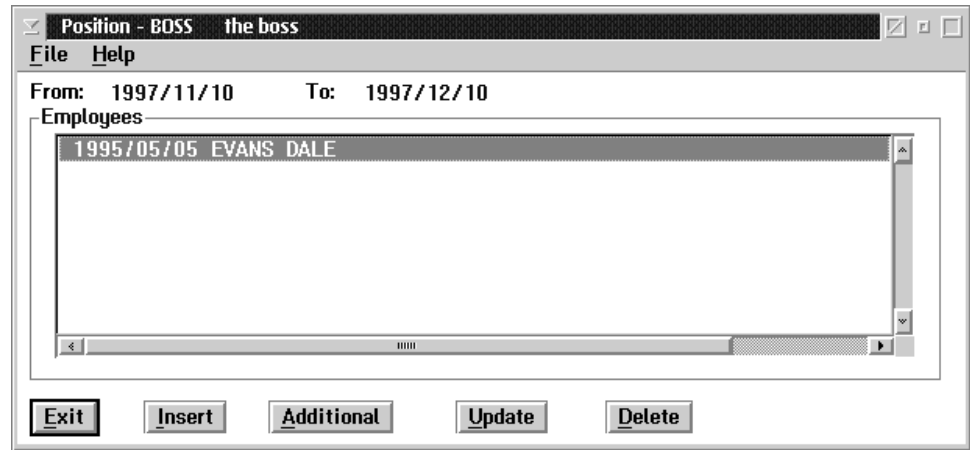


4. When the appropriate information has been entered selected the OK button.

Employee Assignments

The **Employee Assignments** option in the Position menu allows the user to update the table of employees that have been assigned to the current position.

The following dialog box will appear when the user selects the **Employee Assignments** option:



The list will appear empty if no employees have been previously defined in the selected date range.

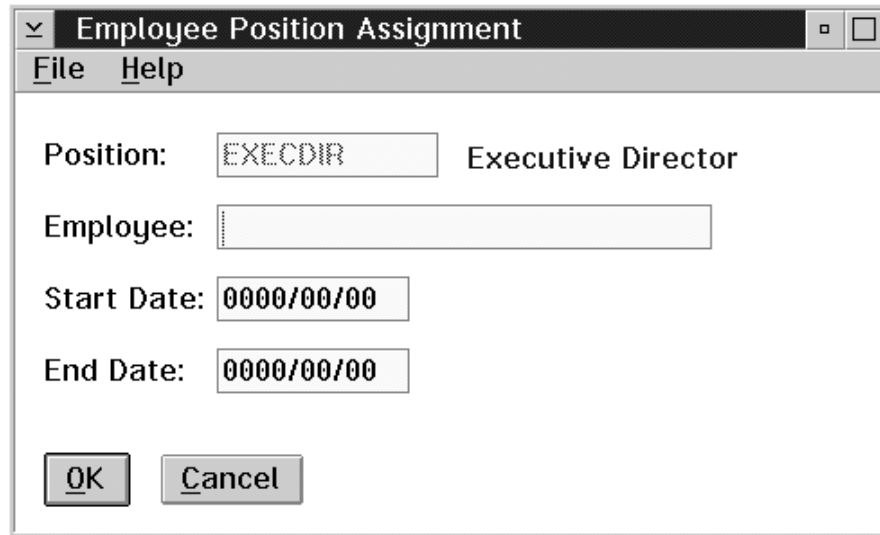
The list contains from left to right the start date, end date, and the name of the employee.

Set Date Range

The **Set Date Range** option in the File menu allows the user to change the date range in order to change the employees that appear in the list.

Insert Item

The INSERT button, or **Insert Item** option in the File menu allows the user to assign a new employee to the position. The dialog box will appear similar to the following:



The dialog box contains the following data fields:

| Field | Description |
|-------------------|--|
| Position | This field contains the position code of the position. |
| Employee | This field contains the employee assigned to the position. |
| Start Date | This field contains the starting date of the employee in the position. |
| End Date | This field contains the ending date of the employee in the position. |

Update Entry

The UPDATE button, or **Update Entry** option in the File menu allows the user to update the information for the employee currently selected with the selection bar. The dialog box will appear similar to the dialog box that appears for assigning a new employee.

Delete Entry

The DELETE button, or **Delete Entry** option in the File menu will remove the employee currently selected with the selection bar from the position.

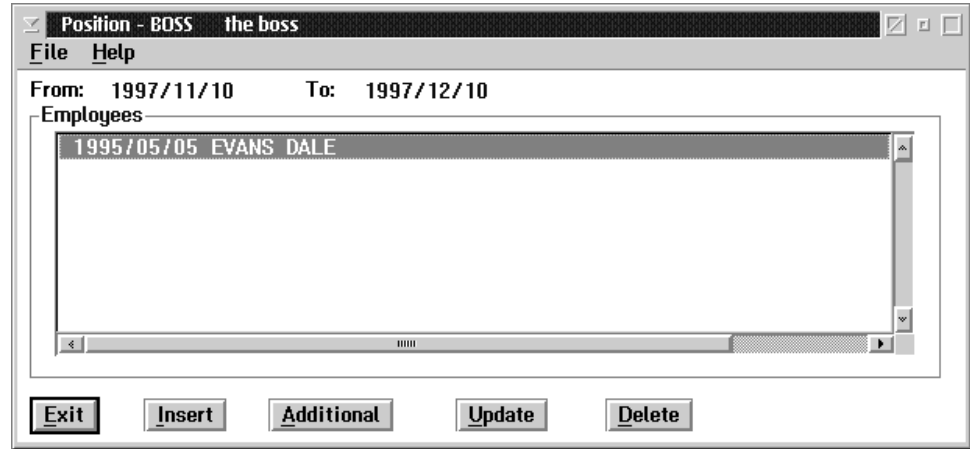
Esc (exit)

The ESC key, EXIT button, or **Exit** option in the File menu will exit the dialog box.

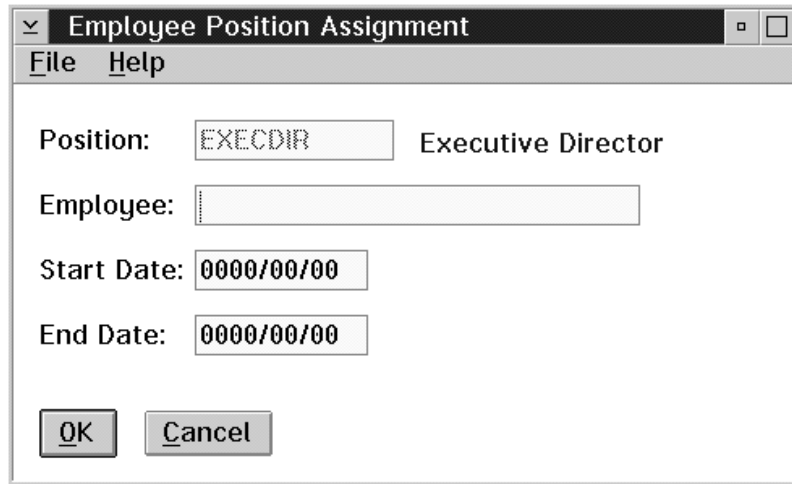
Assigning an Employee

To assign an employee to the position do the following:

1. In the main menu screen select the **Position Menu** option in the Position menu.
2. In the position menu screen select the **Employee Assignments** option in the Position menu. A dialog box similar to the following will appear:



3. Select the INSERT button, or the **Insert Entry** option in the File menu. The following dialog box will appear:



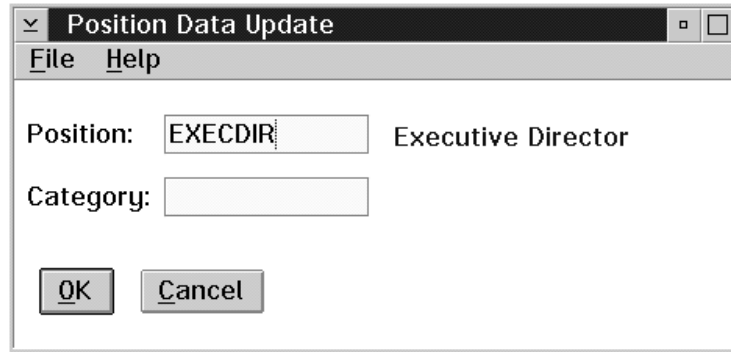
4. When the appropriate information has been entered selected the OK button.

POSITION

Data Update

The **Data Update** option in the Position menu allows the user to update the data tables.

The following dialog box will appear when the user selects the **Data Update** option:



The following table contains descriptions of the fields within the dialog box:

| Field | Description |
|-----------------|---|
| Position | This field contains the code of the position in the data update. |
| Category | This field contains the code of the category in the category update |

F8 (list)

The F8 key, or the **List** option in the File menu will bring up a list of positions or data groups depending on which field the cursor is placed.

Esc (exit)

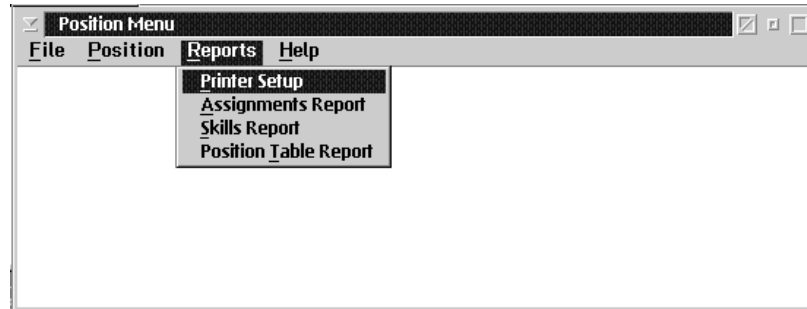
The ESC key, CANCEL button, or **Exit** option in the File menu will exit the dialog box without saving any changes.

OK

The OK button will save any changes made in the dialog box.

Reports

All reports made from the Position Menu screen, Reports menu will pertain only to the currently selected position. If a position has not been selected yet, the user will be prompted to select a position for the report.



The reports available to the user in the Position Menu screen are:

- Assignments Report
- Skills Report
- Position Table Report

Printer Setup

The Printer Setup option in the Reports menu of the Position Menu screen is also available in the Reports menu of the Main Menu screen.

Single Position Assignments

The **Single Position Assignments** option prints a listing of positions for each employee.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the positions to include or exclude in the report.

When a single position is selected before running this program only employees with these positions will be printed. The name of the position will be shown after the report name at the top of the window when a single position has been selected.

The dialog box for the **Single Position Assignments** option in the Report menu appears as follows:

The dialog box is titled "Single Position Assignment Report - Aide". It features a menu bar with "File" and "Help". The main area is organized into three sections:

- Date Range:** Contains two text boxes. The "Start" box is set to "1997/08/20" and the "End" box is set to "1997/09/19".
- Report Fields:** Contains five checkboxes: "Employee" (checked), "Position" (checked), "Start Date" (checked), "End Date" (checked), and "Badge" (unchecked).
- Sort Order:** Contains two radio buttons: "Employee" (selected) and "Position" (unselected).

At the bottom of the dialog are two buttons: "Print Report" and "Cancel".

Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report you may enter the starting and ending date. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following data fields.

| Field | Description |
|-------------------|--|
| Employee | When this field is checked the name of the employee having position will be printed on the report. |
| Position | When this field is checked the description of the position will be printed on the report. |
| Start Date | When this field is checked the starting date for the employee in that position will be printed on the report. |
| End Date | When this field is checked the ending date for the employee in that position will be printed on the report. |
| Badge | When this field is checked the badge number of the employee having the position will be printed on the report. |

Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee Name
- Position - User Defined Position Code

Single Position Skills Report

The **Single Position Skills Report** option prints a listing of skills equipment for each position.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the skills to include or exclude in the report.

When a single position is selected before running this program only that position will be printed. The name of the position will be shown after the report name at the top of the window when a single position has been selected.

This dialog box for the **Single Position Skills Report** option in the Reports menu appears as follows:

Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following data fields.

| Field | Description |
|--------------------|---|
| Position | When this field is checked the description of the position will be printed on the report |
| Skill | When this field is checked the description of the skill will be printed on the report. |
| Start Date | When this field is checked the starting date of the skill for the position will be printed on the report. |
| End Date | When this field is checked the ending date of the skill for the position will be printed on the report. |
| Skill Level | When this field is checked the skill level for the position will be printed on the report. |

Sort Order Selection

The sort order selection for the report allows for the following sort order selections:

- Position - User Defined Position Code
- Skill - User Defined Skill Code

**Select Skills
Selection**

To choose skills for the Position Skills Report select the Select Skills object.

If you have selected positions the message Exclude Selections or Include Selection will be displayed beside the selection button when you return to the select report object dialog box.

**Description Field
Selection**

The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

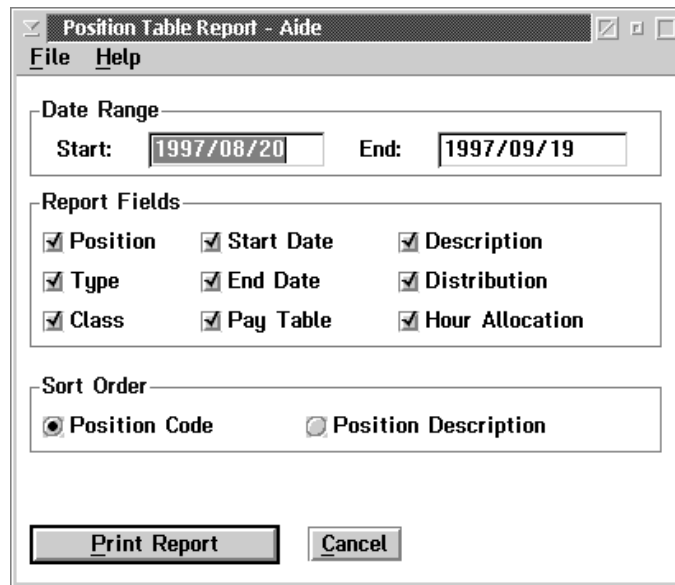
Single Position Table Report

The **Single Position Table Report** option prints a listing of Position Information.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the object to include or exclude in the report.

When a single position is selected before running this program only that position will be printed. The name of the position will be shown after the report name at the top of the window when a single position has been selected.

The dialog box for the **Single Position Table Report** option in the Reports menu appears as follows:



Saving...

The selections made by the user can be saved by selecting the **Save Parameters** in the File menu.

POSITION

Date Range Selection

To limit the range of the report you may enter the starting and ending date. If both dates are zero the entire report will be printed. If only the ending date is zero both the report will be printed from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following nine data fields.

| Field | Description |
|------------------------|---|
| Position | When this field is checked the position will be printed on the report. |
| Description | When this field is checked the description of the position will be printed on the report. |
| Type | When this field is checked the position type code will be printed on the report. |
| Class | When this field is checked the position class code will be printed on the report. |
| Start Date | When this field is checked the starting date of the position will be printed on the report. |
| End Date | When this field is checked the ending date of the position will be printed on the report. |
| Pay Table | When this field is checked the pay table will be printed on the report. |
| Distribution | When this field is checked the distribution will be printed on the report. |
| Hour Allocation | When this field is checked the position hour allocation will be printed on the report. |

Sort Order Selection

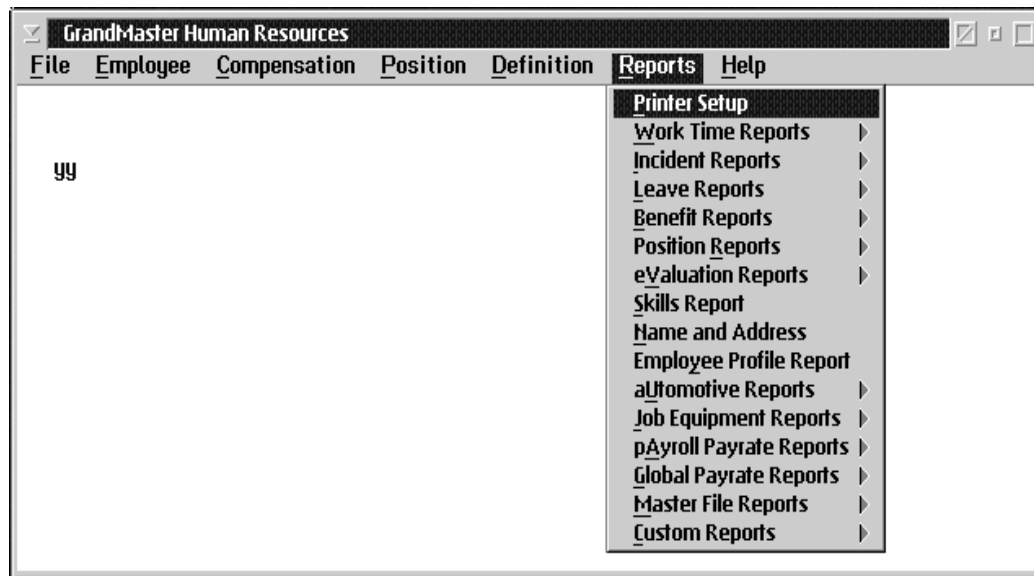
The sort order selection for the report allows for the following sort order selections:

- Position Code - User Defined Code
- Position Description - User Defined Description

REPORTS

The **Reports** menu from the main menu bar is used to print reports containing the data from the GrandMaster Suite Human Resource system.

The **Reports** menu appears as follows:



The report generation process will only include those employees that are part of the current employee group.

The date ranges entered limit the range of the report to only those records that fall with the selected date range.

The Human Resources Module provides two classes of reports, system defined reports, and custom reports.

Custom reports are discussed in the section on custom report definition and generation.

System defined reports have a standard format. The data field included in the report may be modified by the user to eliminate any that are not being used.

| Standard Reports | |
|------------------------------------|--|
| Accident Reports | This report is used to print the Accident Reports |
| Human Rights Report | This report is used to print the Human Rights Reports |
| Labour Board Report | This report is used to print the Labour Board Reports |
| Union Grievance Report | This report is used to print the Union Grievance Reports |
| Other Incidents Report | This report is used to print the Other Incidents Reports |
| Vacation Report | This report is used to print the Vacation Reports |
| Sick Leave Report | This report is used to print the Sick Leave Reports |
| Training Report | This report is used to print the Training Reports |
| In Lieu Report | This report is used to print the In Lieu Reports |
| Other Leave Report | This report is used to print the Other Leave Reports |
| All Leave Report | This report is used to print the All Leave Reports |
| Position Assignments Report | This report is used to print the Position Assignments Reports |
| Position Skills Report | This report is used to print the Position Skills Reports |
| Position Table Report | This report is used to print the Position Table Reports |
| Evaluations Required | This report is used to print the Evaluation Required Reports |
| Evaluations Completed | This report is used to print the Evaluations Completed Reports |
| Skills Report | This report is used to print the Skills Reports |
| Parking Spaces Report | This report is used to print the Parking Spaces Reports |
| Vehicle Assignments Report | This report is used to print the Vehicle Assignments Reports |
| Toolkits Report | This report is used to print the Toolkits Reports |
| Safety Equipment Report | This report is used to print the Safety Equipment Reports |
| Other Equipment Report | This report is used to print the Other Equipment Reports |
| User Defined Code Report | This report is used to print the User Defined Codes |
| Position Table Report | This report is used to print the Position Table Report |
| Calendar Report | This report is used to print the Calendar Report |
| Availability Report | This report is used to print the Availability Report |

General Operation

The report program presents the user with a data selection screen that shows the data fields selected according to the default parameters saved for the report.

The user may change the data field selection for the report. These changes may be saved as the default selection for the report with the **Save Parameters** menu choice.

The user may select a subset of the user defined items in the system for inclusion or exclusion in the report. A maximum of one hundred items may be included in the subset.

After the appropriate selections are made the user can print the report by pressing the **Print Report** button.

Printer Support

The GrandMaster Suite accepts the printer setup from the operating system (Windows or OS/2). Prior to printing a report you should check or be aware of your "DEFAULT" printer settings. The wrong settings could cause your columns not to line up, or lines to wrap (over flow to the next line).

The best font for report printing is a monospaced font such as courier. Proportional fonts will distort the alignment of the columns in the reports.

Example:

| | |
|-------------------------------|--|
| Monospaced font: (courier) | iiiiiiiiiiiiiiiiii wwwwwwwwwwwwwwww |
| Proportional font: (arial) | iiiiiiiiiiiiii wwwwwwwwwwwwwwww |

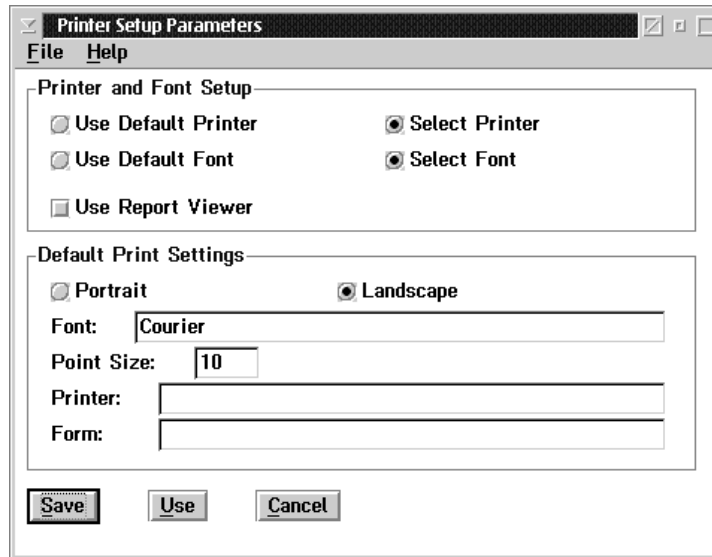
The user may set the preferred paper orientation and font through the printer setup dialog from the report menus. The user may also use this dialog to force the GrandMaster Suite to ask for printer and/or font selection each time a report is printed.

If you have problems with the printing of reports please ensure that you have the correct printer driver installed for your printer. The use of an incorrect or outdated printer driver can cause problems with the appearance and content of the reports.

Printer Setup

The **Printer Setup** option allows the user to select a printer, select different fonts, point size, and select the orientation for the print job.

The following dialog box appears when the **Printer Setup** option is chosen:



If the gray circle to the left of the choice is highlighted, that indicates the choice is currently selected. Only one choice for each type of parameter may be selected at any time.

Saving...

The parameters are saved by pressing the SAVE button with the cursor or selecting the **Save** option in the File menu.

Use...

The parameters are used by pressing the USE button with the cursor or selecting the **Use** option in the File menu. This will be in effect only while you are currently logged on.

Esc (exit)

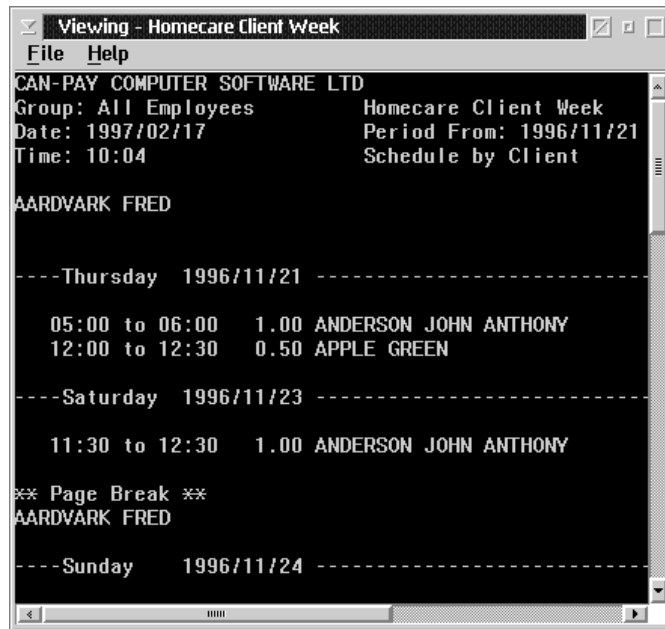
The ESC key, the CANCEL button, or the **Exit** option from the File menu will exit the screen without saving any changes.

Report Viewer

The Report Viewer is a general purpose utility that allows the user to view reports on the screen instead of printing the report on hard copy.

The printer setup screen can be used to turn on the report viewer for all reports. When the “Report Viewer” check box is checked reports will be routed to the report viewer.

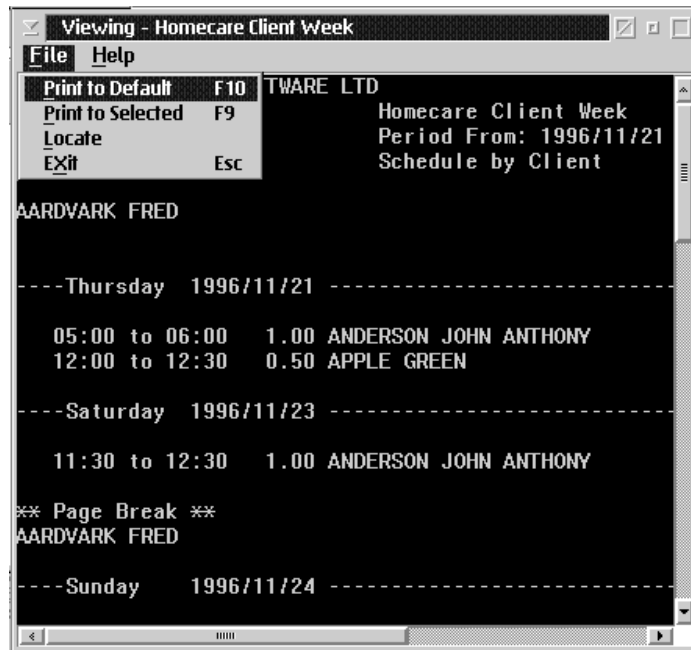
The Report viewer screen displays the report as it is generated the first (5) or nine (9) lines of the screen are used to display the report heading. (nine lines are used when the report width is less than eighty (80) characters).



The report viewer title bar shows the report title prefaced by the current activity. The activity may be one of three values:

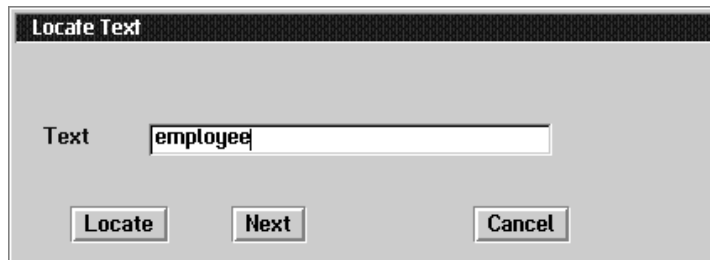
- Preparing - This value indicates that the report program is processing data and creating the report.
- Viewing - This value indicates that the report program has completed it's processing and the complete report is available.
- Printing - This value indicates that the program is printing the report to a printer.

The Report Viewer menu bar has three menu selections under the “File” choice:



- Print To Default - This option will print the report in the viewer to the workstations default printer using the default font from the printer setup screen.
- Print To Selected - This option will print the report after allowing the user to select the printer and font.
- Locate - This choice allows you to search for specific text in the report.

When the user selects locate from the file menu the following screen will appear:



- Exit - This option is used to exit the report viewer. When the viewer is showing the generating activity the report program will be canceled and the viewer window will close down. When the viewer is showing the printing activity the report printing will be canceled but the viewer window will remain open.

When viewing the report the heading lines will remain at the top of the screen and the report body will scroll in the lower portion of the window. The window may be sized to show more of the report data.

The report body is presented without any page breaks unless the program generating the report has requested a new page for some logical subdivision of the report. The page break is represented by a “page break” line in the report body.

Limitations

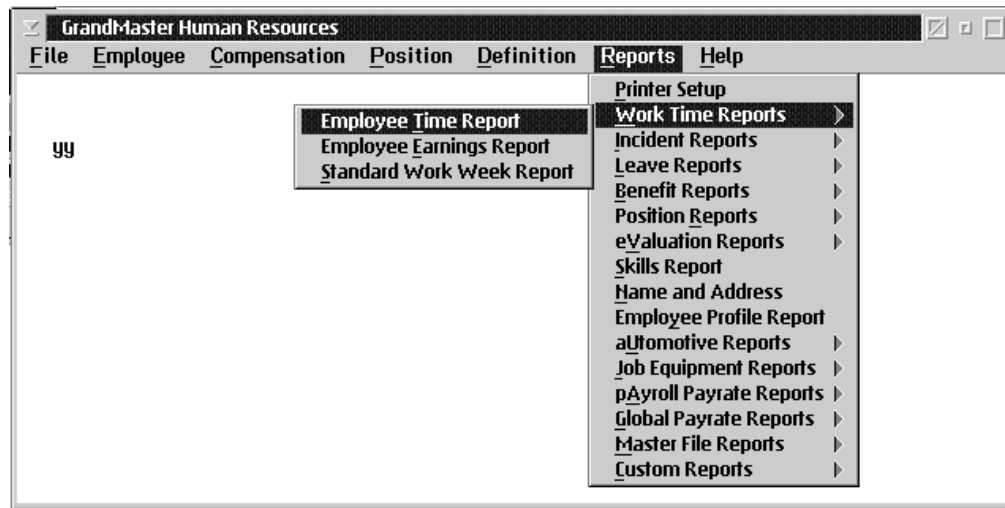
When the program generating the report uses dynamic page formatting based on the printer, font, and paper type selected by the user, the printing of the report from the page viewer may not duplicate the results obtained when the report is printed directly.

The report viewer obtains the page formatting information by assuming the report will be printed on the workstation default printer using the default font.

If the printer setup screen has the select printer and select font options turned on the report viewer will request a printer and font selection at the start of the report generation activity. The choices made will determine the page formatting used by the report viewer.

The choices made for the printer and font are not preserved for the printing of reports by the report viewer. They are only used to determine the page format for the on-screen display of the report

Work Time Report



Work Time Reports

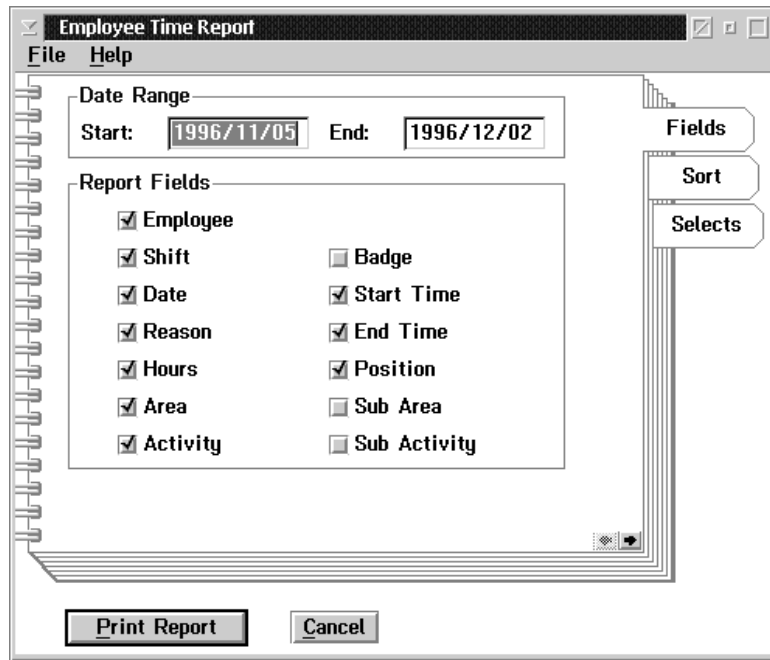
- Employee Time Report
- Employee Earnings Report
- Standard Work Week Report

Employee Time Report

The **Employee Time Report** option presents a listing of the detailed time for each employee.

This function allows the user to select the date range for the report, the data fields to be included in the report, the sort order for the report, and to select the objects to be included or excluded in the report.

The following dialog box appears when the **Employee Time Report** option is chosen:



Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File Menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

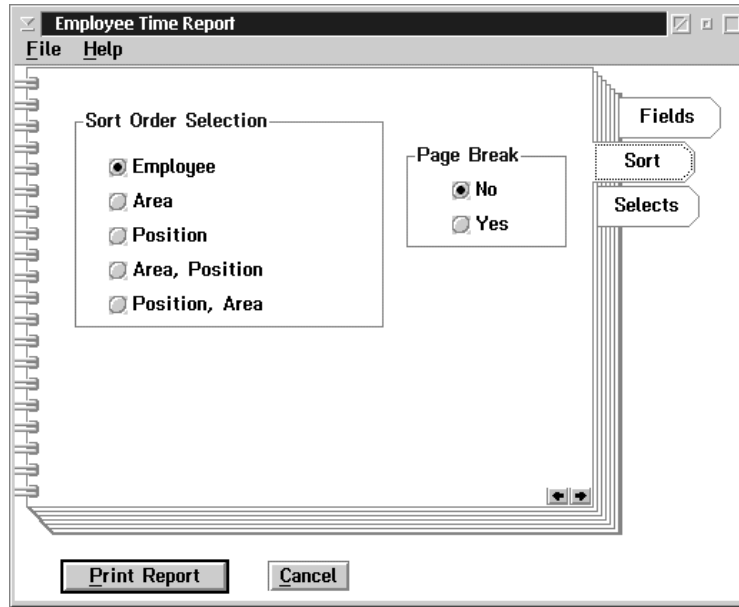
Report Field Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The Report field selection allows for inclusion of the following data fields:

| Field | Description |
|---------------------|---|
| Employee | When this field is checked the name of the employee having the employee time will be printed on the report. |
| Date | When this field is checked the date for the employee time will be printed on the report. |
| Start Time | When this field is checked the starting time for the employee time will be printed on the report. |
| End Time | When this field is checked the ending time for the employee time will be printed on the report. |
| Area | When this field is checked the area for the employee time will be printed on the report. |
| Sub Area | When this field is checked the sub area for the employee time will be printed on the report. |
| Activity | When this field is checked the activity for the employee time will be printed on the report. |
| Sub Activity | When this field is checked the sub activity for the employee time will be printed on the report. |
| Badge | When this field is checked the badge number of the employee having the employee time will be printed on the report. |
| Hours | When this field is checked the hours for the employee time will be printed on the report. |
| Position | When this field is checked the position for the employee time will be printed on the report. |
| Reason | When this field is checked the reason for the employee time will be printed on the report. |
| Shift | When this field is checked the shift for the employee time will be printed on the report. |

The following dialog box appears when the sort tab is chosen:



Sort Order Selection

The sort order selection for the report allows for the following sort order selections:

- Employee - Employee Name
- Area - User defined area code & employee name
- Position - User defined position & employee name
- Area, Position - User defined area, position code & employee name
- Position, Area - User defined position code & area code & employee name

Page Break

The page break selection for the report allows for the following page break options:

- No
- Yes

The following dialog box appears when the select tab is chosen:



Select Report Objects

The Select Report Objects selection for the report allows for the following selection options:

- Shift - User defined shift code
- Position - User defined position code
- Reason - User defined reason code
- Area - User defined area code
- Sub Area - User defined sub area code
- Activity - User defined activity code
- Sub Activity - User defined sub activity code

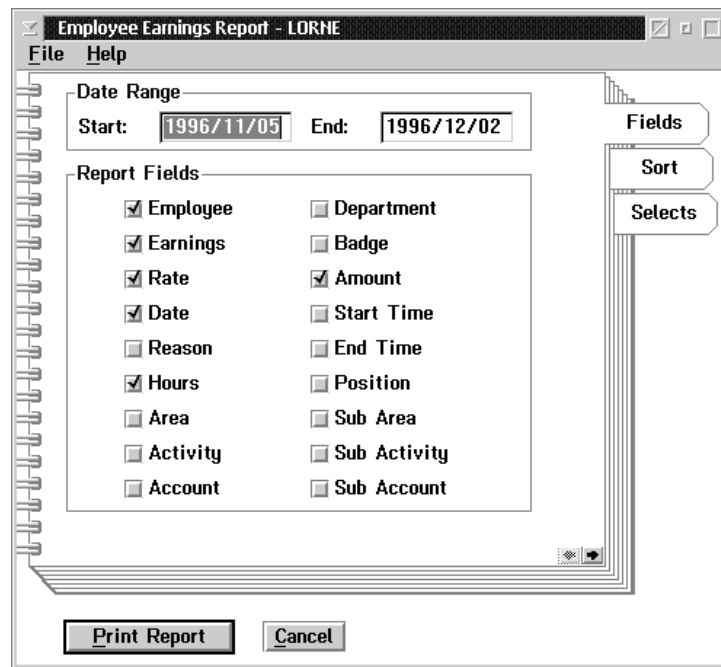
- Select Report Objects** The Select Report Objects selection for the report allows for the following selection options:
- Shift** For instructions on how to select shifts refer to page 11 of the common selection screen chapter. If you have selected shifts the message Exclude selections or Include selections will be displayed beside the SELECT SHIFTS button when you return to the select report objects dialog box.
- Position** For instructions on how to select positions refer to page 9 of the common selection screen chapter. If you have selected positions the message Exclude selections or Include selections will be displayed beside the SELECT POSITIONS button when you return to the select report objects dialog box.
- Reason** For instructions on how to select reasons refer to page 10 of the common selection screen chapter. If you have selected reasons the message Exclude selections or Include selections will be displayed beside the SELECT REASON button when you return to the select report objects dialog box.
- Area** For instructions on how to select area refer to page 5 of the common selection screen chapter. If you have selected area the message Exclude selections or Include selections will be displayed beside the SELECT AREA button when you return to the select report objects dialog box.
- Sub Area** For instructions on how to select sub area refer to page 16 of the common selection screen chapter. If you have selected sub area the message Exclude selections or Include selections will be displayed beside the SELECT SUB AREA button when you return to the select report objects dialog box.
- Activity** For instructions on how to select activity refer to page 4 of the common selection screen chapter. If you have selected activity the message Exclude selections or Include selections will be displayed beside the SELECT ACTIVITY button when you return to the select report objects dialog box.
- Sub Activity** For instructions on how to select sub activity refer to page 15 of the common selection screen chapter. If you have selected sub activity the message Exclude selections or Include selections will be displayed beside the SELECT SUB ACTIVITY button when you return to the select report objects dialog box.

Employee Earning Report

The **Employee Earning Report** option presents a listing of the detailed time for each employee.

This function allows the user to select the date range for the report, the data fields to be included in the report, the sort order for the report, and to select the objects to be included or excluded in the report.

The following dialog box appears when the **Employee Earning Report** option is chosen:



Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File Menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

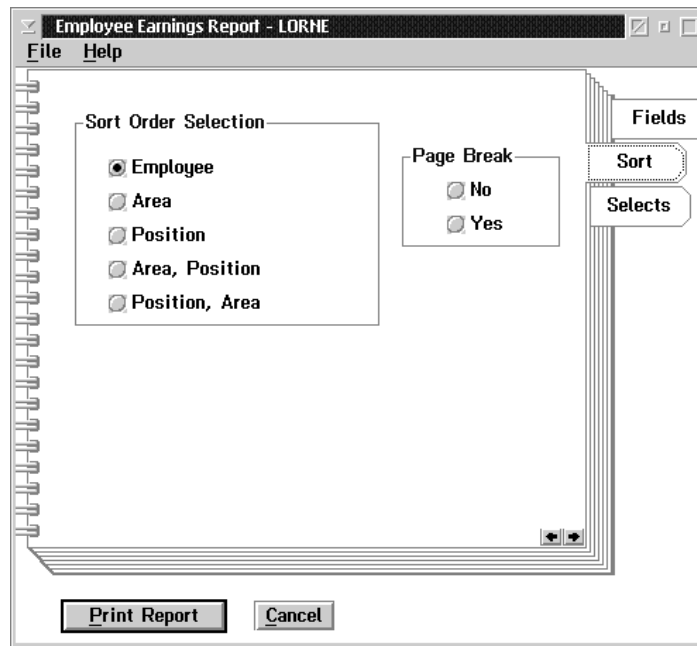
Report Field Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The Report field selection allows for inclusion of the following data fields:

| Field | Description |
|---------------------|--|
| Employee | When this field is checked the name of the employee having the employee earning will be printed on the report. |
| Date | When this field is checked the date for the employee earning will be printed on the report. |
| Start Time | When this field is checked the starting time for the employee earning will be printed on the report. |
| End Time | When this field is checked the ending time for the employee earning will be printed on the report. |
| Area | When this field is checked the area for the employee earning will be printed on the report. |
| Sub Area | When this field is checked the sub area for the employee earning will be printed on the report. |
| Activity | When this field is checked the activity for the employee earning will be printed on the report. |
| Sub Activity | When this field is checked the sub activity for the employee earning will be printed on the report. |
| Badge | When this field is checked the badge number of the employee having the employee earning will be printed on the report. |
| Hours | When this field is checked the hours for the employee earning will be printed on the report. |
| Position | When this field is checked the position for the employee earning will be printed on the report. |
| Reason | When this field is checked the reason for the employee earning will be printed on the report. |
| Shift | When this field is checked the shift for the employee earning will be printed on the report. |
| Earnings | When this field is checked the earnings for the employee earning will be printed on the report. |
| Rate | When this field is checked the rate for the employee earning will be printed on the report. |
| Department | When this field is checked the department for the employee earning will be printed on the report. |
| Account | When this field is checked the account for the employee earning will be printed on the report. |
| Sub Account | When this field is checked the sub account for the employee earning will be printed on the report. |
| Amount | When this field is checked the amount for the employee earning will be printed on the report. |

The following dialog box appears when the sort tab is chosen:



Sort Order Selection

The sort order selection for the report allows for the following sort order selections:

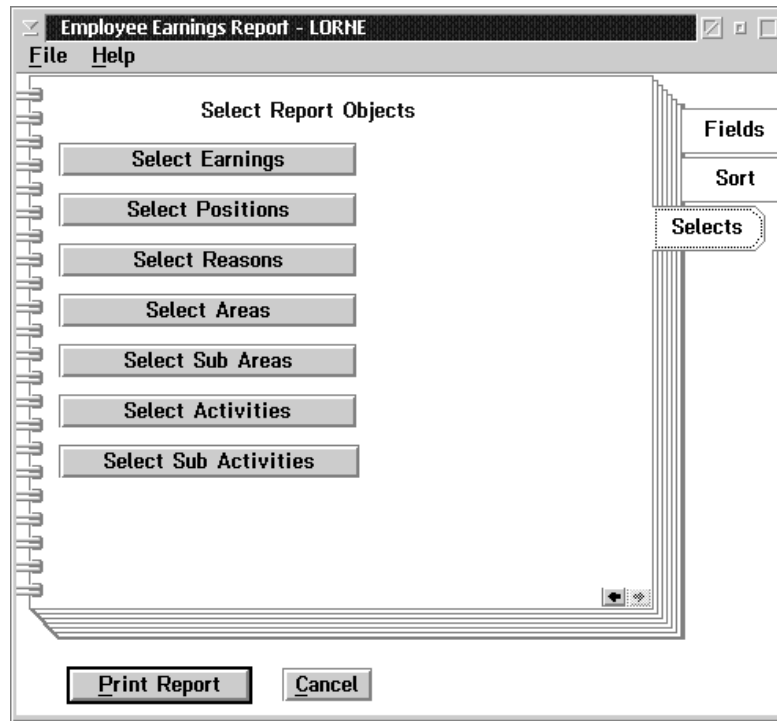
- Employee - Employee Name
- Area - User defined area code & employee name
- Position - User defined position & employee name
- Area, Position - User defined area, position code & employee name
- Position, Area - User defined position code & area code & employee name

Page Break

The page break selection for the report allows for the following page break options:

- No
- Yes

The following dialog box appears when the select tab is chosen:



Select Report Objects

The Select Report Objects selection for the report allows for the following selection options:

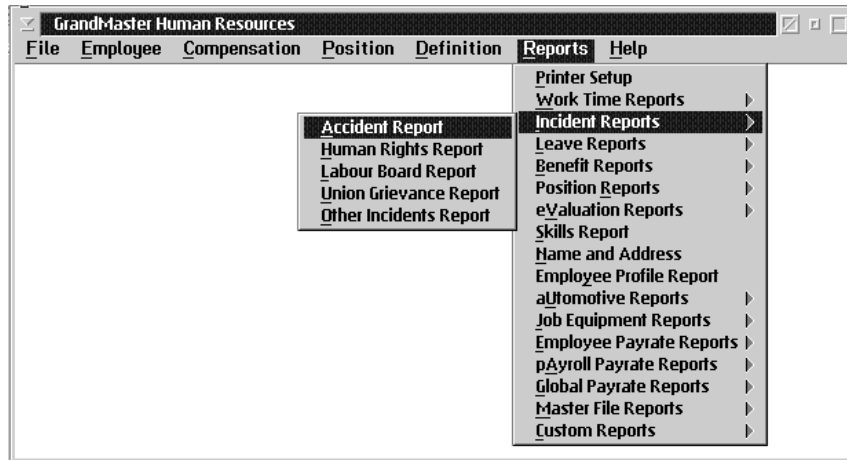
- Earning - User defined earning code
- Position - User defined position code
- Reason - User defined reason code
- Area - User defined area code
- Sub Area - User defined sub area code
- Activity - User defined activity code
- Sub Activity - User defined sub activity code

- Select Report Objects** The Select Report Objects selection for the report allows for the following selection options:
- Earning** For instructions on how to select shifts refer to page 11 of the common selection screen chapter. If you have selected shifts the message Exclude selections or Include selections will be displayed beside the SELECT SHIFTS button when you return to the select report objects dialog box.
- Position** For instructions on how to select positions refer to page 9 of the common selection screen chapter. If you have selected positions the message Exclude selections or Include selections will be displayed beside the SELECT POSITIONS button when you return to the select report objects dialog box.
- Reason** For instructions on how to select reasons refer to page 10 of the common selection screen chapter. If you have selected reasons the message Exclude selections or Include selections will be displayed beside the SELECT REASON button when you return to the select report objects dialog box.
- Area** For instructions on how to select area refer to page 5 of the common selection screen chapter. If you have selected area the message Exclude selections or Include selections will be displayed beside the SELECT AREA button when you return to the select report objects dialog box.
- Sub Area** For instructions on how to select sub area refer to page 16 of the common selection screen chapter. If you have selected sub area the message Exclude selections or Include selections will be displayed beside the SELECT SUB AREA button when you return to the select report objects dialog box.
- Activity** For instructions on how to select activity refer to page 4 of the common selection screen chapter. If you have selected activity the message Exclude selections or Include selections will be displayed beside the SELECT ACTIVITY button when you return to the select report objects dialog box.
- Sub Activity** For instructions on how to select sub activity refer to page 15 of the common selection screen chapter. If you have selected sub activity the message Exclude selections or Include selections will be displayed beside the SELECT SUB ACTIVITY button when you return to the select report objects dialog box.

Incident Reports

The Incident Reports menu from the Reports menu bar is used to print incident reports from the Incident data.

The Incident Reports menu appears as follows:



Incident Reports

There are five types of Incident Reports

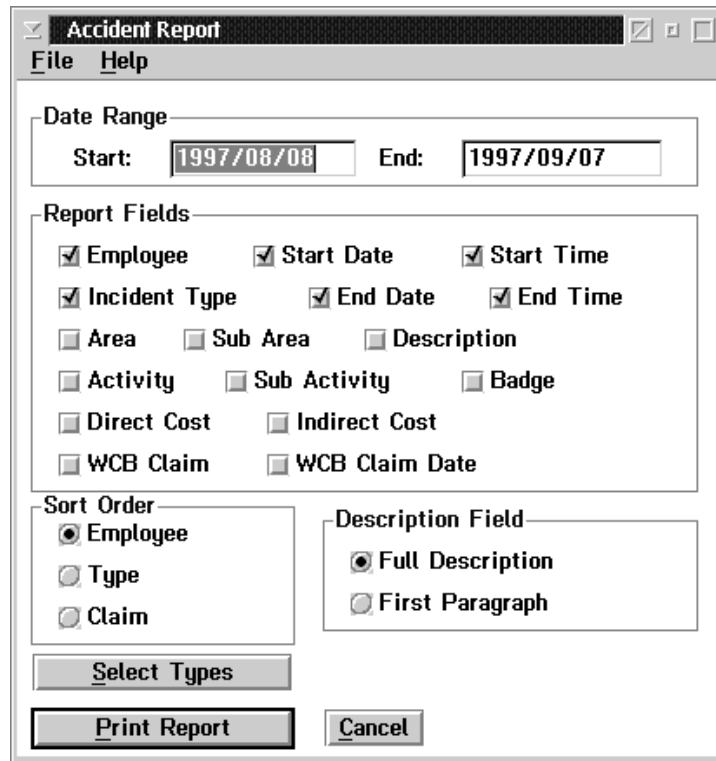
- Accident Reports
- Human Rights Report
- Labour Board Report
- Union Grievance Report
- Other Incidents Report

Accident Report

The **Accident Report** option presents a listing of the accident incidents for each employee.

This function allows the user to select the date range for the report, the data fields to be included in the report, the sort order for the report, and to select the incident types to be included or excluded on the report.

The following dialog box appears when the accident report is chosen:



Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File Menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

A report field is selected for the report when the box to the left of the field has a check mark.

Data Field Selection

A data field selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following data fields.

| Field | Description |
|-----------------------|---|
| Employee | When this field is checked the employee name having the accident incident will be printed on the report. |
| Incident Type | When this field is checked the type description in for the accident incident will be printed on the report |
| Start Date | When this field is checked the starting date for the accident incident will be printed on the report. |
| End Date | When this field is checked the ending date for the accident incident will be printed on the report. |
| Start Time | When this field is checked the starting time for the accident incident will be printed on the report. |
| End Time | When this field is checked the ending time for the accident incident will be printed on the report. |
| Badge | When this field is checked the badge for the accident incident will be printed on the report. |
| Area | When this field is checked the area for the accident incident will be printed on the report. |
| Sub Area | When this field is checked the sub area for the accident incident will be printed on the report. |
| Activity | When this field is checked the activity for the accident incident will be printed on the report. |
| Sub Activity | When this field is checked the sub activity for the accident incident will be printed on the report. |
| Description | When this field is checked the description for the accident incident will be printed on the report. |
| Direct Cost | When this field is checked the direct cost field for the accident incident will be printed on the report. |
| Indirect Cost | When this field is checked the indirect cost field for the accident incident will be printed on the report. |
| WCB Claim | When this field is checked the wcb claim for the accident incident will be printed on the report. |
| WCB Claim Date | When this field is checked the wcb claim date for the accident incident will be printed on the report. |

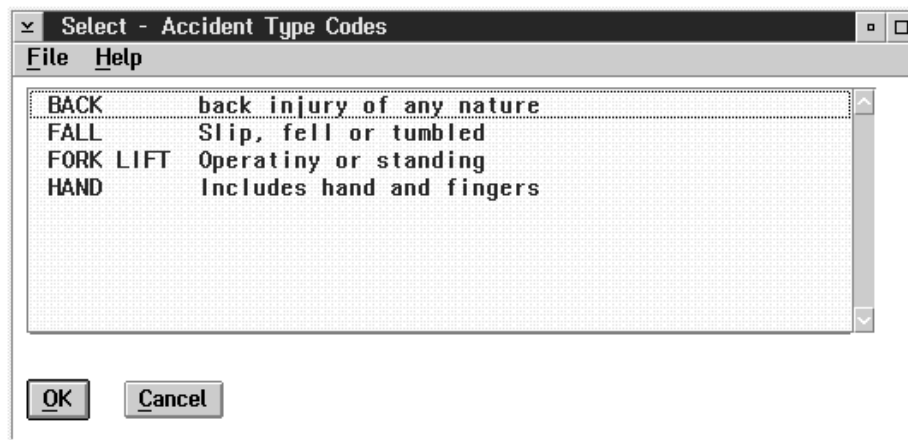
Sort Order Selection

The sort order selection for the report allows for the following sort order selections:

- Employee - Employee Name
- Type - Type of accident incident

Select Types Selection

To choose accident incident types for the report select the **Select Types** option object. A list of all defined types will appear as follows:



The types are selected by clicking on the desired types with the mouse once, this incident type will now be highlighted. Any number of types may be selected by repeating this procedure.

When all the desired types are selected press the OK button.

To de-select a single type simply click on the highlighted area and it will no longer be selected. To de-select all the selected types select the **Clear Type Selection** option in the File menu.

When you are selecting certain incident types you may include or exclude all the selected incident types in the report. This is done by clicking on the Include or Exclude object.

If you have selected incident types the message EXCLUDE SELECTIONS or INCLUDE SELECTIONS will be displayed beside the Select Types object.

Description Field Selection

The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

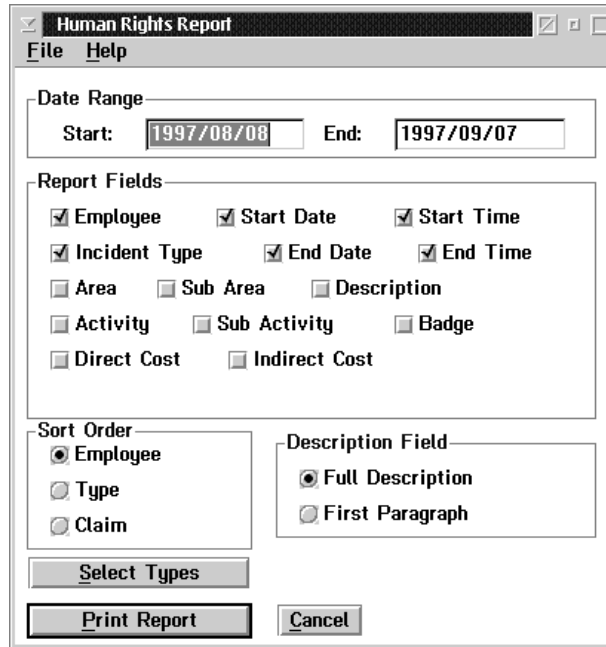
The description area can be up to 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option the report will print all the description information up to the first time you pressed the ENTER key.

Human Rights Report

The **Human Rights Report** option presents a listing of the human rights incidents for each employee.

This function allows the user to select the date range for the report, the data fields to be included in the report, the sort order for the report, and to select the incident types to be included or excluded on the report.

The following dialog box appears when the **Human Right Report** is chosen:



Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File Menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

A report field is selected for the report when the box to the left of the field has a check mark.

The report field selection for the report allows for the inclusion of the following data fields.

| Field | Description |
|----------------------|--|
| Employee | When this field is checked the name of the employee having the human rights incident will be printed on the report. |
| Incident Type | When this field is checked the description of human rights incident will be printed on the report. |
| Start Date | When this field is checked the starting date for the human rights incident will be printed on the report. |
| End Date | When this field is checked the ending date for the human rights incident will be printed on the report. |
| Start Time | When this field is checked the starting time for the human rights incident will be printed on the report. |
| End Time | When this field is checked the ending time for the human rights incident will be printed on the report. |
| Badge | When this field is checked the badge number for the employee having the human rights incident will be printed on the report. |
| Area | When this field is checked the area for the human rights incident will be printed on the report. |
| Sub Area | When this field is checked the sub area for the human rights incident will be printed on the report. |
| Activity | When this field is checked the activity for the human rights incident will be printed on the report. |
| Sub Activity | When this field is checked the sub activity for the human rights incident will be printed on the report. |
| Description | When his field is checked the description for the human rights incident will be printed on the report. |
| Direct Cost | When this field is checked the direct cost for the human rights incident will be printed on the report. |
| Indirect Cost | When this field is checked the indirect cost for the human rights incident will be printed on the report. |

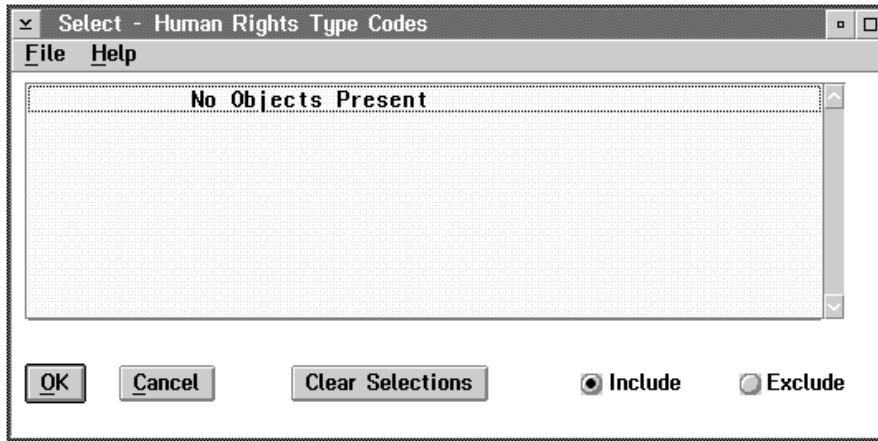
Sort Order Selection

The sort order selection for the report allows for the following sort order selections:

- Employee - Employee Name
- Type - type of human rights incident

Select Types Selection

To choose human rights incident types for the report select the Select Types object. A list of all defined types will appear as follows:



The incident types are selected by clicking on the desired incident types with the mouse once, this incident type will now be highlighted. Any number of incident types may be selected by repeating this procedure.

When all the desired types are selected press the OK button.

To de-select a single incident type simply click on the highlighted incident and it will no longer be selected. To de-select all the selected types select the **Clear Selection** option in the File menu.

When you are selecting certain incident types you may include or exclude all the selected incident types in the report. This is done by clicking on the Include or Exclude object.

If you have selected incident types the message EXCLUDE or INCLUDE SELECTIONS will be displayed beside the Select Types object.

Description Field Selection

The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

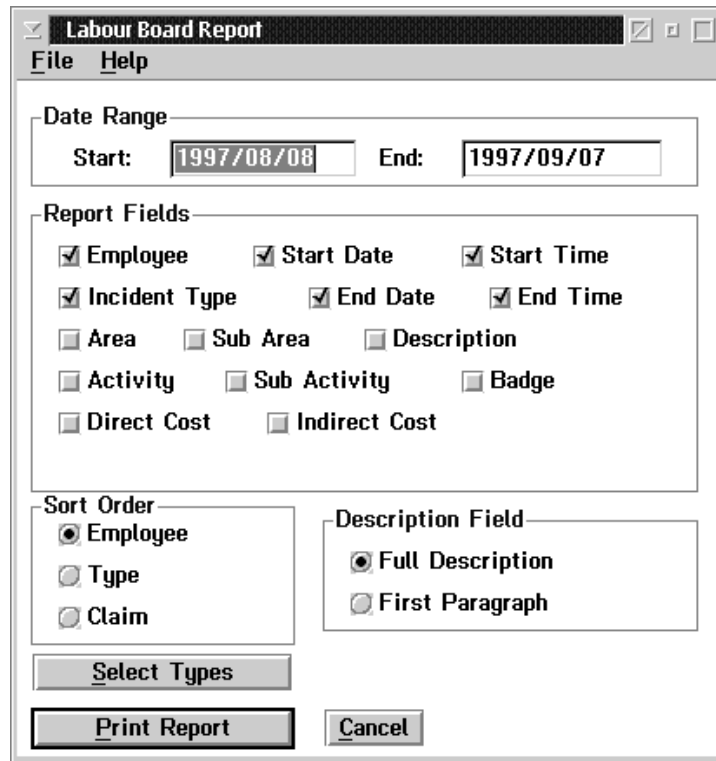
The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

Labour Board Report

The **Labour Board Report** option presents a listing of the labour board incidents for each employee.

This function allows the user to select the date range for the report, the data fields to be included in the report, the sort order for the report, and to select the incident types to be included or excluded on the report.

The following dialog box appears when the **Labour Board Report** is chosen:



Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File Menu.

Date Range Selection

To limit the range of the report starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

A report field is selected for the report when the box to the left of the field has a check mark.

The report field selection for the report allows for the inclusion of the following data fields.

| Field | Description |
|----------------------|---|
| Employee | When this field is checked the employee name for the employee having the labour board incident will be printed on the report. |
| Incident Type | When this field is checked the type description of the labour board incident will be printed on the report. |
| Start Date | When this field is checked the starting date for the labour board incident will be printed on the report. |
| End Date | When this field is checked the end date for the incident will be printed on the report. |
| Start Time | When this field is checked the starting time for the labour board incident will be printed on the report. |
| End Time | When this field is checked the ending time for the labour board incident will be printed on the report. |
| Badge | When this field is checked the badge for the labour board incident will be printed on the report. |
| Area | When this field is checked the area for the labour board incident will be printed on the report. |
| Sub Area | When this field is checked the sub area for the labour board incident will be printed on the report. |
| Activity | When this field is checked the activity for the labour board incident will be printed on the report. |
| Sub Activity | When this field is checked the sub activity for the labour board incident will be printed on the report. |
| Description | When this field is checked the description for the labour board incident will be printed on the report. |
| Direct Cost | When this field is checked the direct cost for the labour board incident will be printed on the report. |
| Indirect Cost | When this field is checked the indirect cost for the labour board incident will be printed on the report. |

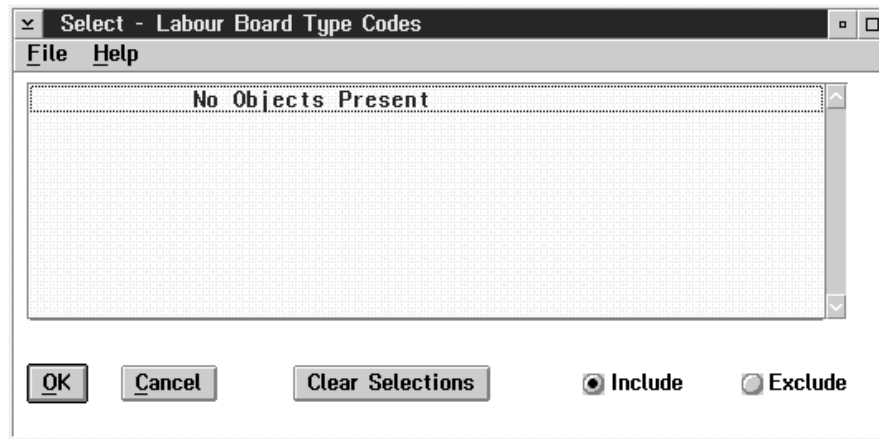
Sort Order Selection

The sort order selection for the report allows for the following sort order selections:

- Employee - Employee name
- Type - Type of labour board incident

Select Types Selection

To choose labour board for the Report select the Select Types option object. A list of all defined types will appear as follows:



The incident types are selected by clicking on the desired incident type with the mouse once, this incident type will now be highlighted. Any number of incident types may be selected by repeating this procedure.

When all the desired types are selected press the OK button.

To de-select a single incident type simply click on the highlighted incident type and it will no longer be selected. To de-select all the selected incident types select the **Clear Selection** option in the File menu.

When you are selecting certain incident types you may include or exclude all the selected incident types in the report. This is done by clicking on the Include or Exclude object.

If you have selected incident types the message EXCLUDE SELECTIONS or INCLUDE SELECTIONS will be displayed beside the Select Types object.

Description Field Selection

The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

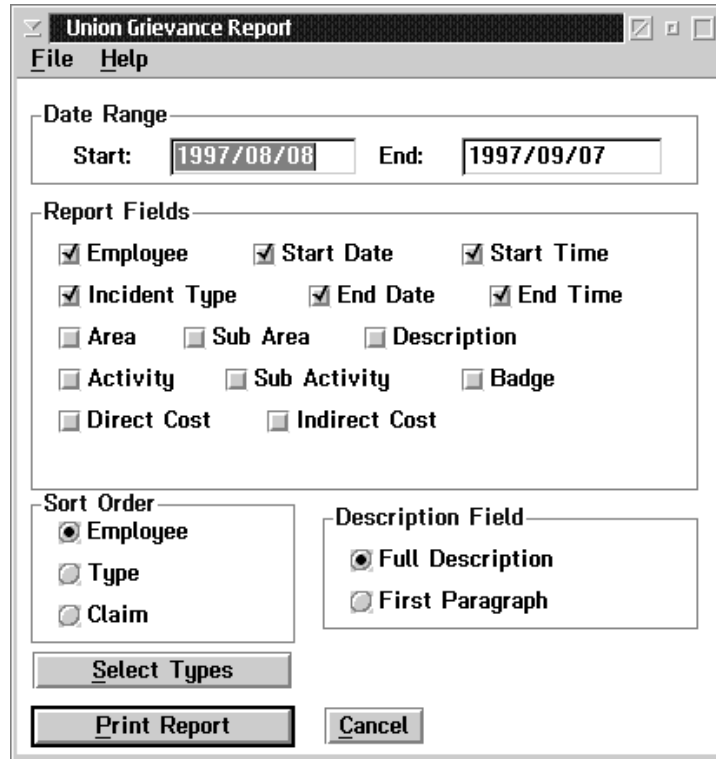
The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

Union Grievances Report

The **Union Grievances Report** option presents a listing of the union grievances incidents for each employee.

This function allows the user to select the date range for the report, the data fields to be included in the report, the sort order for the report, and to select the incident types to be included or excluded on the report.

The following dialog box appears when the **Union Grievances Report** is chosen:



Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File Menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

A report field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following data fields.

| Field | Description |
|----------------------|--|
| Employee | When this field is checked the name of the employee having the union grievance incident will be printed on the report. |
| Incident Type | When this field is checked the type description for the union grievance incident will be printed on the report. |
| Start Date | When this field is checked the starting date for the union grievance incident will be printed on the report. |
| End Date | When this field is checked the ending date for the union grievance incident will be printed on the report. |
| Start Time | When this field is checked the starting time for the union grievance incident will be printed on the report. |
| End Time | When this field is checked the ending time for the union grievance incident will be printed on the report. |
| Area | When this field is checked the area for the union grievance incident will be printed on the report. |
| Sub Area | When this field is checked the sub area for the union grievance incident will be printed on the report. |
| Activity | When this field is checked the activity for the union grievance incident will be printed on the report. |
| Sub Activity | When this field is checked the sub activity for the union grievance incident will be printed on the report. |
| Description | When this field is checked the description for the union grievance incident will be printed on the report. |
| Indirect Cost | When this field is checked the indirect cost for the union grievance incident will be printed on the report. |
| Direct Cost | When this field is checked the direct cost for the union grievance incident will be printed on the report. |

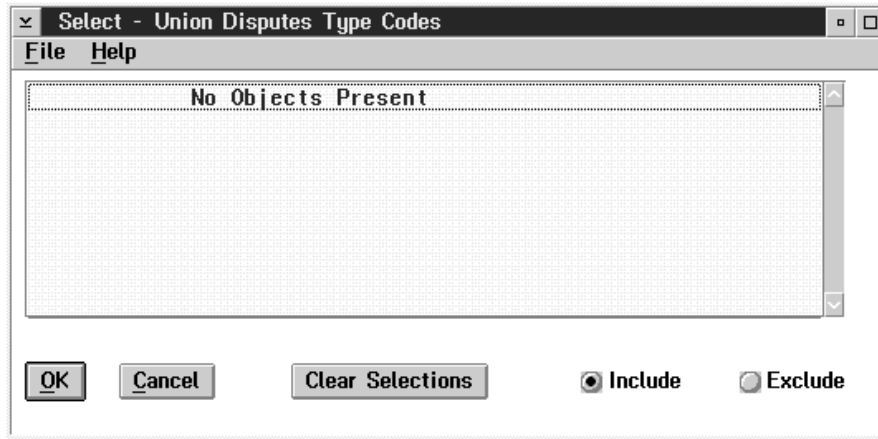
Sort Order Selection

The sort order selection for the report allows for the following sort order selections:

- Employee - Employee Name
- Type - Type of union grievance incident

Select Types Selection

To choose union grievance incident types for the report select the **Select Types** option in the File menu. A list of all defined types will appear as follows:



The incident types are selected by clicking on the desired incident type with the mouse once, this incident type will now be highlighted. Any number of incident types may be selected by repeating this procedure.

When all the desired types are selected press the OK button.

To de-select a single incident type simply click on the highlighted incident type and it will no longer be selected. To de-select all the selected incident types click on the **Clear Selections** object.

When you are selecting certain incidents types you may include or exclude all the selected incident types in the report. This is done by clicking on the Include or Exclude object.

If you have selected incident types the message EXCLUDE SELECTIONS or INCLUDE SELECTIONS will be displayed beside the Select Types object.

Description Field Selection

The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

Other Incidents Report

The **Other Incident Report** option presents a listing of the other incidents for each employee.

This function allows the user to select the date range for the report, the data fields to be included in the report, the sort order for the report, and to select the incident types to be included or excluded on the report.

The following dialog box appears when the **Other Incidents Report** is chosen:

The dialog box titled "Other Incident Report" contains the following elements:

- Date Range:** Start: 1997/08/08, End: 1997/09/07
- Report Fields:**
 - Employee, Start Date, Start Time
 - Incident Type, End Date, End Time
 - Area, Sub Area, Description
 - Activity, Sub Activity, Badge
 - Direct Cost, Indirect Cost
- Sort Order:**
 - Employee
 - Type
 - Claim
- Description Field:**
 - Full Description
 - First Paragraph
- Buttons:** Select Types, Print Report, Cancel

Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File Menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

A report field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following data fields.

| Field | Description |
|----------------------|--|
| Employee | When this field is checked the name of the employee having the other incident will be printed on the report. |
| Incident Type | When this field is checked the type description for the other incident will be printed on the report. |
| Start Date | When this field is checked the starting date for the other incident will be printed on the report. |
| End Date | When this field is checked the ending date for the other incident will be printed on the report. |
| Start Time | When this field is checked the starting time for the other incident will be printed on the report. |
| End Time | When this field is checked the ending time for the other incident will be printed on the report. |
| Badge | When this field is checked the badge for the other incident will be printed on the report. |
| Area | When this field is checked the area for the other incident will be printed on the report. |
| Sub Area | When this field is checked the sub area for the other incident will be printed on the report. |
| Activity | When this field is checked the activity for the other incident will be printed on the report. |
| Sub Activity | When this field is checked the sub activity for the other incident will be printed on the report. |
| Description | When this field is checked the description for the other incident will be printed on the report. |
| Indirect Cost | When this field is checked the indirect cost for the other incident will be printed on the report. |
| Direct Cost | When this field is checked the direct cost for the other incident will be printed on the report. |

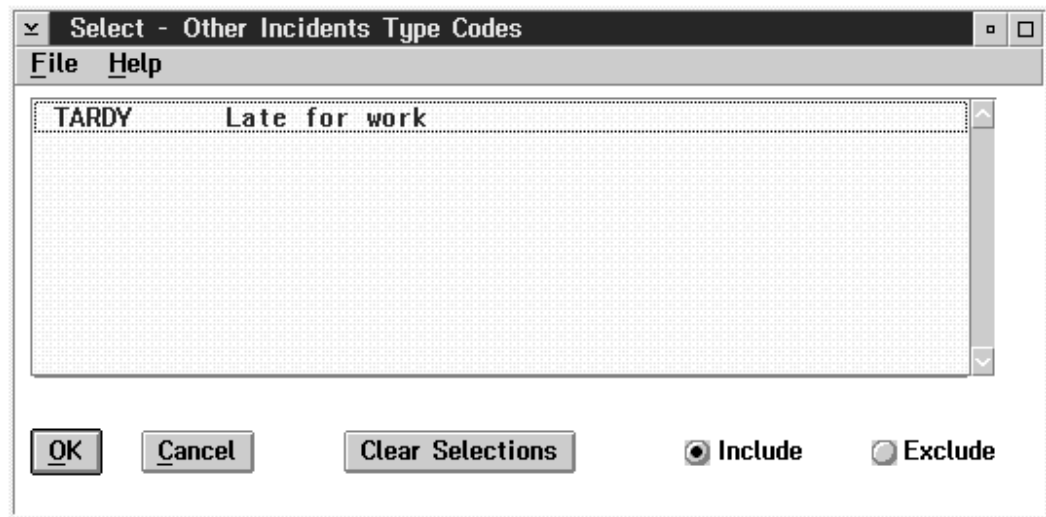
Sort Order Selection

The sort order selection for the report allows for the following sort order selections:

- Employee - Employee Name
- Type - Type of other incident

Incident Type Selection

To choose incident types for the Other Incident Report select the **Select Incident Types** option in the File menu. A list of all defined types will appear as follows:



The types are selected by clicking on the desired types with the mouse once, this incident type will now be highlighted. Any number of types may be selected by repeating this procedure.

When all the desired types are selected press the OK button.

To de-select a single type simply click on the highlighted area and it will no longer be selected. To de-select all the selected types select the **Clear Selection** option in the File menu.

Description Field Selection

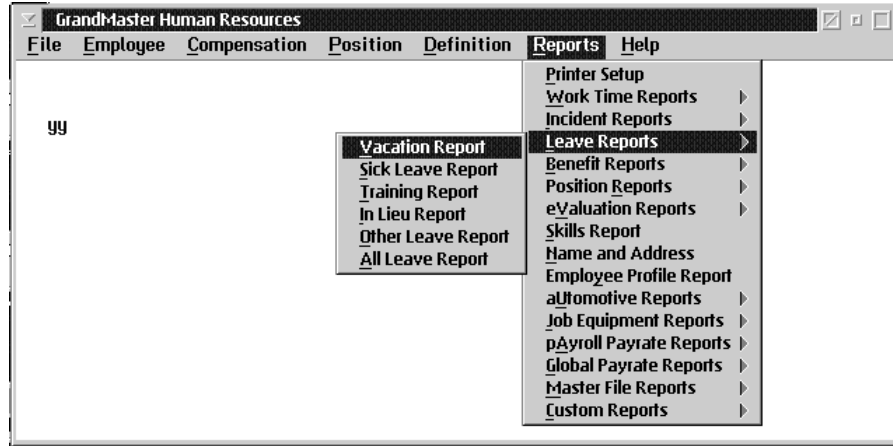
The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

Leave Reports

The Leave reports menu bar appears as follows:



The following leave reports are available:

- Vacation Report
- Sick Leave Report
- Training Report
- In Lieu Report
- Other Leave Report
- All Leave Report

Vacation Report

The **Vacation Report** option prints a listing of the vacation reasons for each employee.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the reasons to include or exclude in the report.

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report name at the top of the window when a single employee has been selected.

The dialog box for the vacation report option in the reports menu appears as follows:

The dialog box titled "Vacation Report" includes the following elements:

- Date Range:** Start: 1996/04/25, End: 1996/05/25
- Report Fields:**
 - Employee, Start Date, Start Time
 - Reason, End Date, End Time
 - Badge, Description
- Sort Order:**
 - Employee, Date, Reason
- Description Field:**
 - Full Description, Part Description
- Buttons:** Select Reasons, Print Report, Cancel

Saving..

The selections made by the user can be saved by selecting the **Save Parameters** option in the File Menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

A report field is selected for the report when the box to the left of the field has a check mark.

The report field selection for the report allows for the inclusion of the following data fields.

| Field | Description |
|--------------------|--|
| Employee | When this field is checked the name of the employee having the vacation leave will be printed on the report. |
| Reason | When this field is checked the vacation leave reason will be printed on the report. |
| Start Date | When this field is checked the start date for the vacation leave will be printed on the report. |
| End Date | When this field is checked the ending date for the vacation leave will be printed on the report. |
| Start Time | When this field is checked the starting time for the vacation leave will be printed on the report. |
| End Time | When this field is checked the end time for the vacation leave will be printed on the report. |
| Description | When this field is checked the vacation leave description will be printed on the report. |
| Badge | When this field is checked the badge number of the employee having the vacation leave will be printed on the report. |

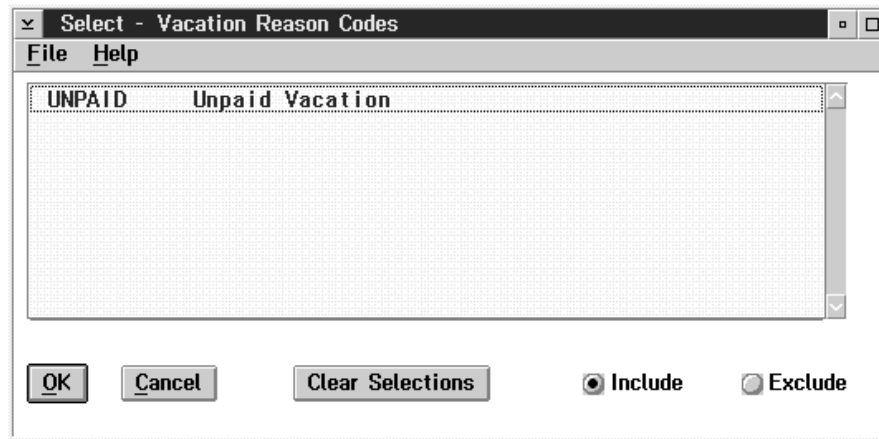
Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee name
- Date - Starting date of the vacation
- Reason - Vacation reason

Select Reasons Selection

To choose vacation reasons for the report select the **Select Reasons** object and a list of all defined reasons will appear as follows:



The reasons are selected by clicking on the desired reason with the mouse once, this reason will now be highlighted. Any number of reasons may be selected by repeating this procedure.

When all the desired reasons are selected press the OK button.

To de-select a single reason simply click on the highlighted reason and it will no longer be selected. To de-select all the selected reasons click on the **Clear Selections** button.

Description Field Selection

The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

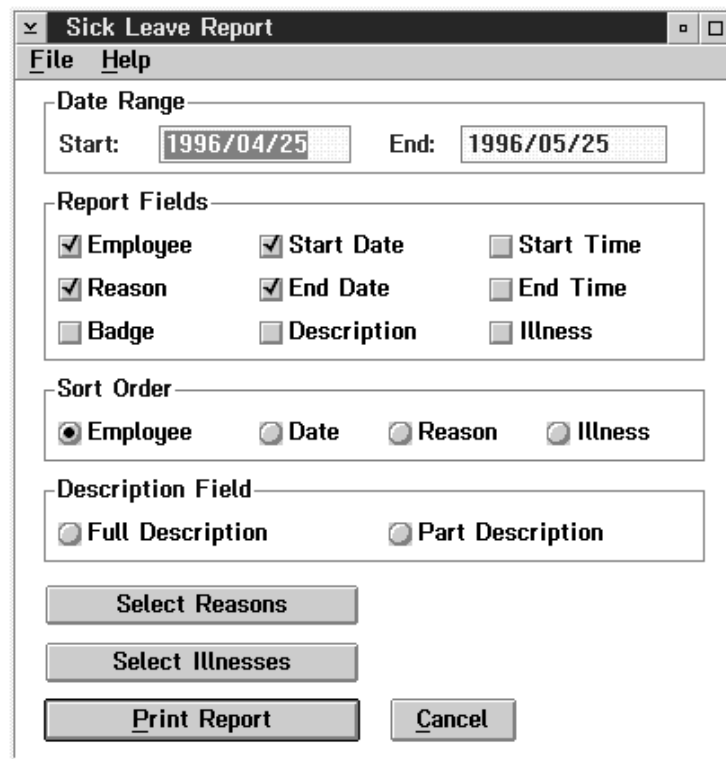
Sick Leave Report

The **Sick Leave Report** option prints a listing of the sick leave reasons for each employee.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the reasons and include illnesses to include or exclude in the report.

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report name at the top of the window when a single employee has been selected.

The dialog box for the **Sick Leave Report** option in the reports menu appears as follows:



Saving..

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

A report field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following data fields.

| Field | Description |
|--------------------|--|
| Employee | When this field is checked the name of the employee having the sick leave will be printed on the report. |
| Reason | When this field is checked the sick leave reason will be printed on report. |
| Illness | When this field is checked the sick leave illness will be printed on the report. |
| Start Date | When this field is checked the starting date for the sick leave will be printed on the report. |
| End Date | When this field is checked the ending date for the sick leave will be printed on the report. |
| Start Time | When this field is checked the starting time for the sick leave will be printed on the report. |
| End Time | When this field is checked the ending time for the sick leave will be printed on the report. |
| Description | When this field is checked the description for the sick leave will be printed on the report. |
| Badge | When this field is checked the badge number of the employee having the sick leave will be printed on the report. |

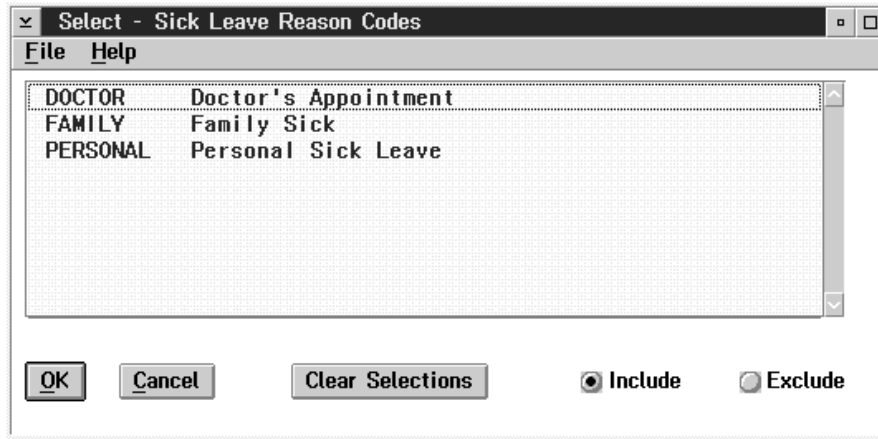
Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee name
- Date - Starting date of sick leave
- Reason - sick leave reason
- Illness - sick leave illness

Select Reason Selection

To choose sick leave reasons for the report select the **Select Reasons** object and a list of all defined reasons will appear as follows:



The reasons are selected by clicking on the desired reason with the mouse once, this reason will now be highlighted. Any number of reasons may be selected by repeating this procedure.

When all the desired reasons are selected press the OK button.

To de-select a single reason simply click on the highlighted reason and it will no longer be selected. To de-select all the selected reasons select the **Clear Selections** option in the file menu.

When you are selecting certain reasons you may include or exclude all the selected reasons in the report. This is done by clicking on the Include or Exclude object.

If you have selected reasons the message EXCLUDE SELECTIONS or INCLUDE SELECTIONS will be displayed beside the Select Reasons object.

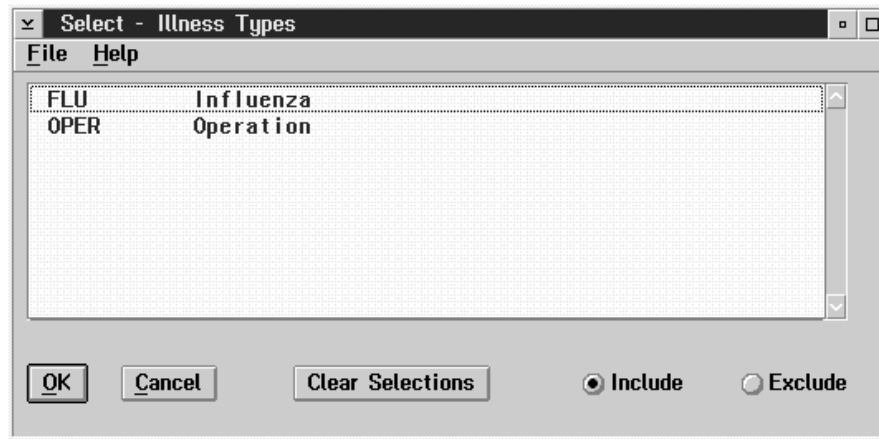
Description Field Selection

The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

Illness Selection To choose illnesses for the Sick Leave Report select the **Select Illnesses** object. A list of all defined illnesses will appear as follows:



The illnesses are selected by clicking on the desired illnesses with the mouse once, this illnesses will now be highlighted. Any number of illnesses may be selected by repeating this procedure.

When all the desired illnesses are selected press the OK button.

To de-select a single illness simply click on the highlighted illness and it will no longer be selected. To de-select all the selected illnesses select the **Clear Illnesses** object.

Description Field Selection The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

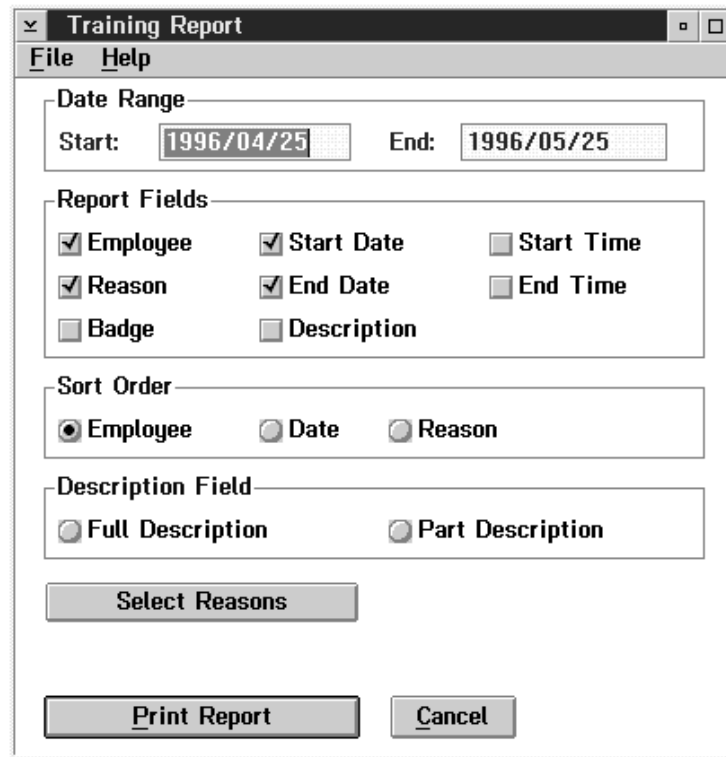
Training Report

The **Training Report** option prints a listing of the training reasons for each employee.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the reasons to include or exclude in the report.

When this is run from the employee menu before running this program only that employee will be printed. The employee name will be shown after the report name at the top of the window when a single employee has been selected.

The dialog box for the **Training Report** option in the reports menu appears as follows:



Saving..

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

A report field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following data fields.

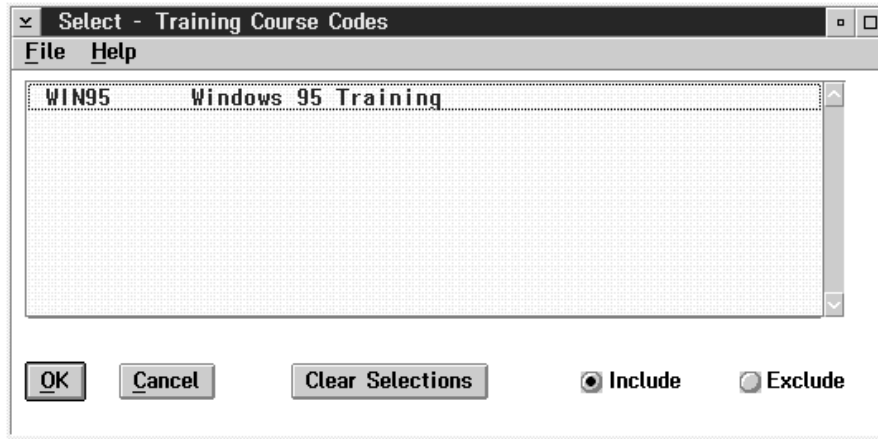
| Field | Description |
|--------------------|--|
| Employee | When this field is checked the name of the employee having training leave will be printed on the report. |
| Badge | When this field is checked the badge number of the employee having the training leave will be printed on the report. |
| Reason | When this field is checked the reason for the training leave will be printed on the report. |
| Start Date | When this field is checked the starting date for the training leave will be printed on the report. |
| End Date | When this field is checked the ending date for the training leave will be printed on the report. |
| Start Time | When this field is checked the starting time for the training leave will be printed on the report. |
| End Time | When this field is checked the ending time for the training leave will be printed on the report. |
| Description | When this field is checked the description of the training leave will be printed on the report. |

Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee Name
- Date - Starting date of the training
- Reason - Training reason

Reason Selection To choose training reasons for the report select the **Select Reasons** object a list of all defined reasons will appear as follows:



The reasons are selected by clicking on the desired reason with the mouse once, this reason will now be highlighted. Any number of reasons may be selected by repeating this procedure.

When all the desired reasons are selected press the OK button.

To de-select a single reason simply click on the highlighted reason and it will no longer be selected. To de-select all the selected reasons select the **Clear Selections** option in the file menu.

Description Field Selection The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

In Lieu Report

The **In Lieu Report** option prints a listing of the in lieu reasons for each employee.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the reasons to include or exclude in the report.

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report name at the top of the window when a single employee has been selected.

The dialog box for the **In Lieu Report** option in the reports menu appears as follows:

Saving..

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

The report field selection for the report allows for the inclusion of the following data fields.

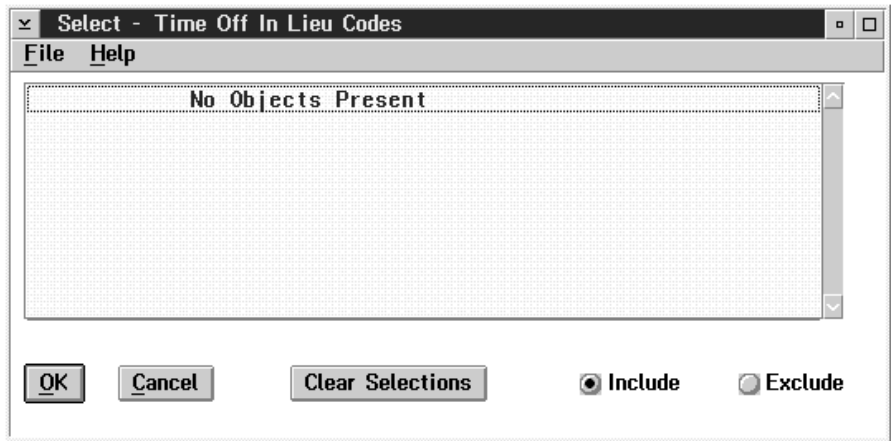
| Field | Description |
|--------------------|---|
| Employee | When this field is checked the name of the employee having the in lieu leave will be printed on the report. |
| Badge | When this field is checked the badge number of the employee having the in lieu leave will be printed on the report. |
| Reason | When this field is checked the reason for the in lieu leave will be printed on the report. |
| Start Date | When this field is checked the starting date for the in lieu leave will be printed on the report. |
| End Date | When this field is checked the ending date for the in lieu leave will be printed on the report. |
| Start Time | When this field is checked the starting time for the in lieu leave will be printed on the report. |
| End Time | When this field is checked the ending time for the in lieu leave will be printed on the report. |
| Description | When this field is checked the description for the in lieu leave will be printed on the report. |

Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee name
- Date - Starting date of the in lieu leave
- Reason - In lieu leave reason

Reason Selection To choose reasons for the In Lieu Report select the **Select Reasons** option in the file menu a list of all defined reasons will appear as follows:



The reasons are selected by clicking on the desired reason with the mouse once, this reason will now be highlighted. Any number of reasons may be selected by repeating this procedure.

When all the desired reasons are selected press the OK button.

To de-select a single reason simply click on the highlighted reason and it will no longer be selected. To de-select all the selected reasons select the **Clear Selections** option in the file menu.

Description Field Selection The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

Other Leave Report

The **Other Leave Report** option prints a listing of the other leave reasons for each employee.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the reasons to include or exclude in the report.

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report name at the top of the window when a single employee has been selected

The dialog box for the **Other Leave Report** option in the reports menu appears as follows:



Saving..

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

A report field is selected for the report when the box to the left of the field has a check mark.

The report field selection for the report allows for the inclusion of the following data fields.

| Field | Description |
|--------------------|---|
| Employee | When this field is checked the name of the employee having the other leave will be printed on the report. |
| Badge | When this field is checked the badge number of the employee having the other leave will be printed on the report. |
| Reason | When this field is checked the other leave reason will be printed on the report. |
| Start Date | When this field is checked the starting date for the other leave will be printed on the report. |
| End Date | When this field is checked the ending date for the other leave will be printed on the report. |
| Start Time | When this field is checked the starting time for the other leave will be printed on the report. |
| End Time | When this field is checked the ending time for the other leave will be printed on the report. |
| Description | When this field is checked the description for the other leave will be printed on the report. |

Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee name
- Date - Starting date of the other leave
- Reason - Other leave reason

Reason Selection To choose other leave reasons for the report select the **Select Reasons** object a list of all defined reasons will appear as follows:



The reasons are selected by clicking on the desired reason with the mouse once, this reason will now be highlighted. Any number of reasons may be selected by repeating this procedure.

When all the desired reasons are selected press the OK button.

To de-select a single reason simply click on the highlighted reason and it will no longer be selected. To de-select all the selected reasons select the **Clear Selections** option in the file menu.

Description Field Selection The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

All Leave Report

The **All Leave Report** option prints a listing of the All Leave reasons for each employee.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the reasons to include or exclude in the report.

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report name at the top of the window when a single employee has been selected.

The dialog box for the **All Leave Report** option in the reports menu appears as follows:

The dialog box is titled "All Employee Leave Types Report" and contains the following elements:

- Date Range:** Start: 1996/04/25, End: 1996/05/25
- Report Fields:**
 - Employee
 - Reason
 - Badge
 - Start Date
 - End Date
 - Description
 - Start Time
 - End Time
- Sort Order:**
 - Employee
 - Date
- Description Field:**
 - Full Description
 - Part Description
- Buttons:** Print Report, Cancel

Saving..

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

The report field selection for the report allows for the inclusion of the following data fields.

| Field | Description |
|--------------------|---|
| Employee | When this field is checked the name of the employee having the leave will be printed on the report. |
| Badge | When this field is checked the badge number of the employee having the leave will be printed on the report. |
| Reason | When this field is checked the reason for the leave will be printed on the report. |
| Start Date | When this field is checked the starting date for the leave will be printed on the report. |
| End Date | When this field is checked the ending date for the leave will be printed on the report. |
| Start Time | When this field is checked the starting time for the leave will be printed on the report. |
| End Time | When this field is checked the ending time for the leave will be printed on the report. |
| Description | When this field is checked the description for the leave will be printed on the report. |

Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee name
- Date - Starting date of the leave

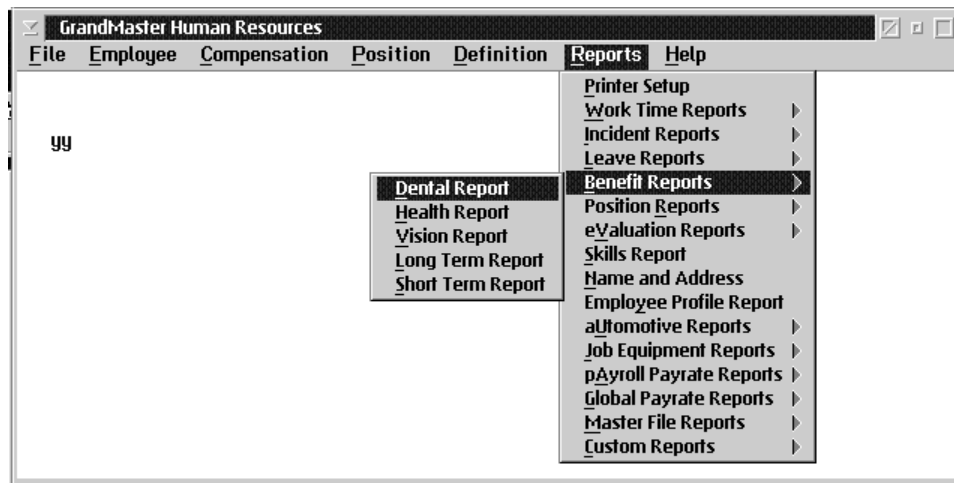
Description Field Selection

The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

Benefits



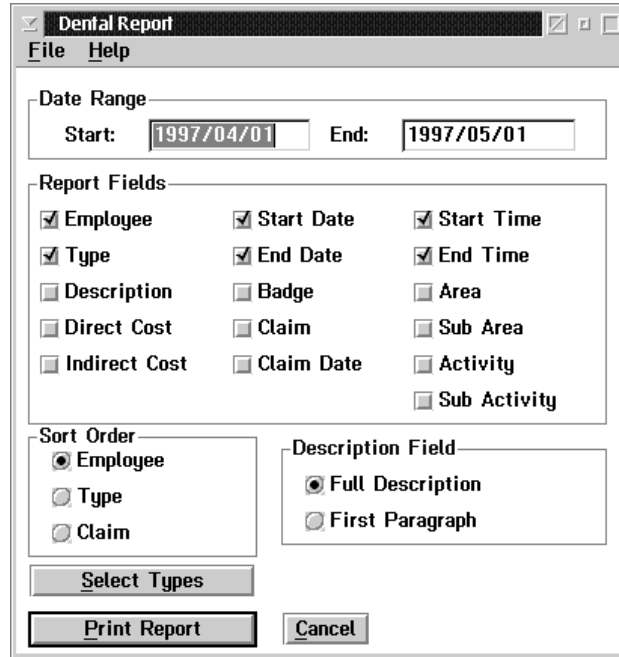
Benefit Reports

- Dental Report
- Health Report
- Vision Report
- Long Term Report
- Short Term Report

Dental Report

The Dental Report option presents a listing of the Dental Report for each employee. This function allows the user to select the date range for the report, the data fields to be included in the report, the sort order for the report, and to select the benefit types to be included or excluded on the report.

The following dialog box appears when the Dental Report is chosen:



**Date Range
Selection**

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

The following table gives a description of the fields within the screen:

| Field | Description |
|---------------|---|
| Employee | When this field is checked the employee name will be printed. |
| Type | When this field is checked the type of benefit will be printed. |
| Description | When this field is checked the description of the report will be printed. |
| Direct Cost | When this field is checked the direct cost of the benefit will be printed. |
| Indirect Cost | When this field is checked the indirect cost of the benefit will be printed. |
| Start Date | When this field is checked the starting date of the report will be printed. |
| End Date | When this field is checked the ending date of the report will be printed. |
| Badge | When this field is checked the badge number of the employee will be printed. |
| Claim | When this field is checked the claim number of the benefit claim will be printed. |
| Claim Date | When this field is checked the date of the claim will be printed. |
| Start Time | When this field is checked the starting time of the report will be printed. |
| End Time | When this field is checked the ending time of the report will be printed. |
| Area | When this field is checked the area of the report will be printed. |
| Sub Area | When this field is checked the sub area of the report will be printed. |
| Activity | When this field is checked the activity for the report will be printed. |
| Sub Activity | When this field is checked the sub activity for the report will be printed. |

**Sort Order
Selection**

The sort order selection for the report allows for the following sort order selections:

- Employee
- Type
- Claim

Description Field Selection The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up to 8,000 characters and you may not want to see the entire description printed in all cases. If you select the First Paragraph option in the report it will print all the descriptions information up to the first time you print pressed the enter key.

Health Report

The Health Report option presents a listing of the Health Report for each employee.

This function allows the user to select the date range for the report, the data fields to be included in the report, the sort order for the report, and to select the benefit types to be included or excluded on the report.

The following dialog box appears when the Health Report is chosen:

The dialog box is titled "Health Report" and has a menu bar with "File" and "Help". It contains the following sections:

- Date Range:** Start: 1997/04/01, End: 1997/05/01
- Report Fields:**
 - Employee
 - Type
 - Description
 - Direct Cost
 - Indirect Cost
 - Start Date
 - End Date
 - Badge
 - Claim
 - Claim Date
 - Start Time
 - End Time
 - Area
 - Sub Area
 - Activity
 - Sub Activity
- Sort Order:**
 - Employee
 - Type
 - Claim
- Description Field:**
 - Full Description
 - First Paragraph

Buttons at the bottom: **Select Types**, **Print Report**, **Cancel**

Date Range

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

The following table gives a description of the fields within the screen:

| Field | Description |
|---------------|--|
| Employee | When this field is checked the employee name will printed on the report. |
| Type | When this field is checked the type of health claim will be printed. |
| Description | When this field is checked the description of the report will be printed on the report. |
| Direct Cost | When this field is checked the direct cost of the health claim will be printed. |
| Indirect Cost | When this field is checked the indirect cost of the health claim will be printed. |
| Start Date | When this field is checked the starting date of the report will be printed. |
| End Date | When this field is checked the ending date of the report will be printed on the report. |
| Badge | When this field is checked the badge number of the employee will be printed on the report. |
| Claim | When this field is checked the health claim number will be printed. |
| Claim Date | When this field is checked the date of the claim will be printed on the report. |
| Start Time | When this field is checked the starting time for the report will be printed on the report. |
| End Time | When this field is checked the ending time for the report will be printed on the report. |
| Area | When this field is checked the area for the report will be printed on the report. |
| Sub Area | When this field is checked the sub area for the report will be printed on the report. |
| Activity | When this field is checked the activity for the report will be printed on the report. |
| Sub Activity | When this field is checked the sub activity for the report will be printed on the report. |

Sort Order Selection

The sort order selection for the report allows for the following sort order selections:

- Employee
- Type
- Claim

Description Field Selection

The description field selection for the report allows for the following field options:

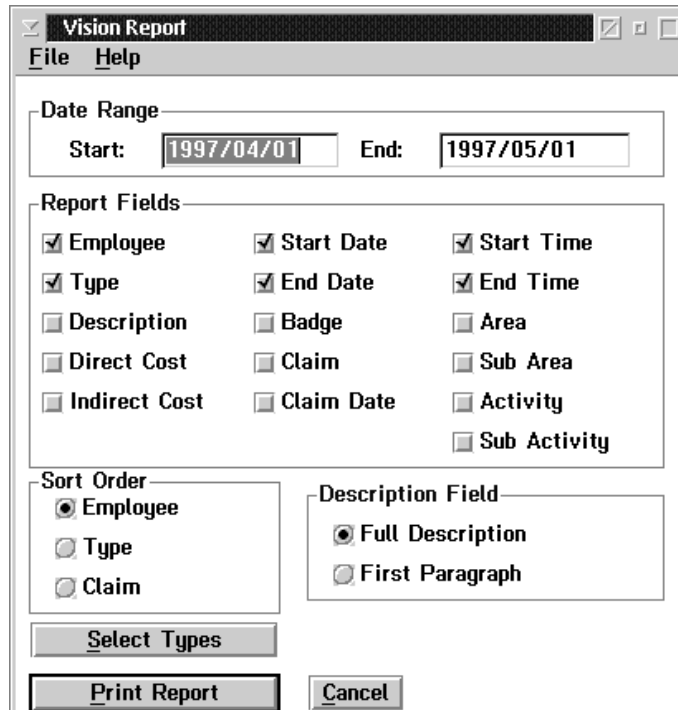
- Full Description - Entire description entered
- First Paragraph - First Paragraph entered

The description area can be up to 8,000 characters and you may not want to see the entire description printed in all cases. If you select the First Paragraph in the report it will print all the description information up to the first time you pressed the enter key.

Vision Report

The Vision Report option presents a listing of the Vision Report for each employee. This function allows the user to select the date range for the report, the data fields to be included in the report, the sort order for the report, and to select the benefit types to be included or excluded on the report.

The following dialog box appears when the Vision Report is chosen:



Date Range

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

The following table gives a description of the fields within the report:

| Field | Description |
|---------------|--|
| Employee | When this field is checked the employee name will be printed |
| Type | When this field is checked the type of vision claim will be printed. |
| Description | When this field is checked the description of the report will be printed. |
| Direct Cost | When this field is checked the direct cost of the vision claim will be printed. |
| Indirect Cost | When this field is checked the indirect cost of the vision claim will be printed. |
| Start Date | When this field is checked the starting date of the report will be printed. |
| End Date | When this field is checked the ending date of the report will be printed. |
| Badge | When this field is checked the badge number of the report will be printed. |
| Claim | When this field is checked the claim number will be printed. |
| Claim Date | When this field is checked the date of the claim for the report will be printed on the report. |
| Start Time | When this field is checked the starting time for the report will be printed on the report. |
| End Time | When this field is checked the ending time for the report will be printed. |
| Area | When this field is checked the area for the report will be printed. |
| Sub Area | When this field is checked the sub area for the report will be printed. |
| Activity | When this field is checked the activity for the report will be printed on the report. |
| Sub Activity | When this field is checked the sub activity for the report will be printed on the report. |

Sort Order Selection

The sort order selection for the report allows for the following sort order selections:

- Employee
- Type
- Claim

Description Field Selection

The description field selection for the report allows for the following field options:

- Full Description - Entire descriptions entered
- First Paragraph - First paragraph entered

The description area can be up to 8,000 characters and you may not want to see the entire description printed in all cases. If you select the First Paragraph option in the report it will print all the description information up to the first time you pressed the enter key.

Long Term Report

The Long Term Report option presents a listing of the Long Term Report for each employee.

This function allows the user to select the date range for the report, the data fields to be included in the report, the sort order for the report, and to select the benefit types to be included or excluded on the report.

The following dialog box appears when the Long Term Report is chosen:

Long Term Report
File Help

Date Range
Start: 1997/04/01 End: 1997/05/01

Report Fields

| | | |
|--|--|--|
| <input checked="" type="checkbox"/> Employee | <input checked="" type="checkbox"/> Start Date | <input checked="" type="checkbox"/> Start Time |
| <input checked="" type="checkbox"/> Type | <input checked="" type="checkbox"/> End Date | <input checked="" type="checkbox"/> End Time |
| <input type="checkbox"/> Description | <input type="checkbox"/> Badge | <input type="checkbox"/> Area |
| <input type="checkbox"/> Direct Cost | <input type="checkbox"/> Claim | <input type="checkbox"/> Sub Area |
| <input type="checkbox"/> Indirect Cost | <input type="checkbox"/> Claim Date | <input type="checkbox"/> Activity |
| | | <input type="checkbox"/> Sub Activity |

Sort Order
 Employee
 Type
 Claim

Description Field
 Full Description
 First Paragraph

Select Types

Print Report Cancel

Date Range

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

The following table gives a description of the fields within the screen:

| Field | Description |
|---------------|--|
| Employee | When this field is checked the employee's name will be printed on the report. |
| Type | When this field is checked the type of long term claim will be printed. |
| Description | When this field is checked the description of the report will be printed on the report. |
| Direct Cost | When this field is checked the direct cost of the long term claim will be printed. |
| Indirect Cost | When this field is checked the indirect cost of the long term claim will be printed. |
| Start Date | When this field is checked the starting date of the report will be printed. |
| End Date | When this field is checked the ending date of the report will be printed. |
| Badge | When this field is checked the badge number of the employee will be printed on the report. |
| Claim | When this field is checked the long term claim number will be printed. |
| Claim Date | When this field is checked the date of the claim for the report will be printed on the report. |
| Start Time | When this field is checked the starting time of the report will be printed on the report. |
| End Time | When this field is checked the ending time for the report will be printed on the report. |
| Area | When this field is checked the area for the report will be printed on the report. |
| Sub Area | When this field is checked the sub area for the report will be printed on the report. |
| Activity | When this field is checked the activity for the report will be printed on the report. |
| Sub Activity | When this field is checked the sub activity for the report will be printed on the report. |

Sort Order Selection

The sort order selection for the report allows for the following sort order selections

- Employee
- Type
- Claim

Description Field Selection

The description field selection for the report allows for the following field options

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description can be up to 8,000 characters and you may not want to see the first paragraph option in the report it will print all the description information up to the first line you pressed the enter key.

Short Term Report

The Short Term Report option presents a listing of the Short Term Report for each employee.

This function allows the user to select the date range for the report, the data fields to be included in the report, the sort order for the report, and to select the benefit types to be included or excluded on the report.

The following dialog box appears when the Short Term Report is chosen:

Short Term Report File Help

Date Range
Start: 1997/04/01 End: 1997/05/01

Report Fields

| | | |
|--|--|--|
| <input checked="" type="checkbox"/> Employee | <input checked="" type="checkbox"/> Start Date | <input checked="" type="checkbox"/> Start Time |
| <input checked="" type="checkbox"/> Type | <input checked="" type="checkbox"/> End Date | <input checked="" type="checkbox"/> End Time |
| <input type="checkbox"/> Description | <input type="checkbox"/> Badge | <input type="checkbox"/> Area |
| <input type="checkbox"/> Direct Cost | <input type="checkbox"/> Claim | <input type="checkbox"/> Sub Area |
| <input type="checkbox"/> Indirect Cost | <input type="checkbox"/> Claim Date | <input type="checkbox"/> Activity |
| | | <input type="checkbox"/> Sub Activity |

Sort Order

Employee
 Type
 Claim

Description Field

Full Description
 First Paragraph

Select Types

Print Report Cancel

Date Range Selection

To limit the range of the report the starting and ending date may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print the starting date until the end of the report.

The following table gives a description of the fields within the screen:

| Field | Description |
|---------------|--|
| Employee | When this field is checked the employee's name will be printed on the report. |
| Type | When this field is checked the type of short term claim will be printed. |
| Description | When this field is checked the description of the report will be printed on the report. |
| Direct Cost | When this field is checked the direct cost of the short term claim will be printed. |
| Indirect Cost | When this field is checked the indirect cost of the short term claim will be printed. |
| Start Date | When this field is checked the starting date for the report will be printed on the report. |
| End Date | When this field is checked the ending date for the report will be printed on the report. |
| Badge | When this field is checked the badge number for the report will be printed on the report. |
| Claim | When this field is checked the short term claim number will be printed. |
| Claim Date | When this field is checked the date of the claim will be printed on the report. |
| Start Time | When this field is checked the starting time of the report will be printed on the report. |
| End Time | When this field is checked the ending time of the report will be printed on the report. |
| Area | When this field is checked the area of the report will be printed on the report. |
| Sub Area | When this field is checked the sub area of the report will be printed on the report. |
| Activity | When this field is checked the activity of the report will be printed on the report. |
| Sub Activity | When this field is checked the sub activity of the report will be printed on the report. |

Sort Order Selection

The sort order selection for the report allows for the following sort order selections:

- Employee
- Type
- Claim

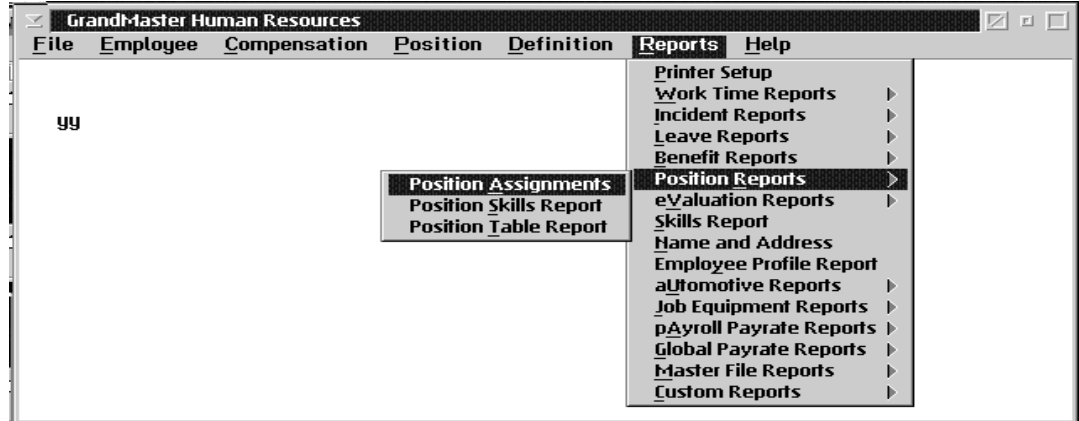
Description Field Selection The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up to 8,000 characters and you may not want to see the entire description printed in all cases. If you select the first paragraph option in the report it will print all the descriptions information up to the first time you pressed the enter key.

Position Reports

The Position Reports sub menu appears as follows:



The following position reports are available:

- Position Assignments
- Position Skills Report
- Position Table Report

Position Assignments

The **Position Assignments** option prints a listing of positions for each employee.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the positions to include or exclude in the report. If a single employee was selected before running this program only that employee will be printed.

If a single position was selected before running this program only employees with these positions will be printed. The name of the position will be shown after the report name at the top of the window when a single position has been selected. The **Select Positions** option will not be available if a single position has been selected.

The dialog box for the **Position Assignments** option in the Report menu appears as follows:

The dialog box titled "Position Assignment Report" contains the following elements:

- Date Range:** Start: 1996/08/15, End: 1996/09/14
- Report Fields:**
 - Employee
 - Start Date
 - Badge
 - Position
 - End Date
- Sort Order:**
 - Employee
 - Position
- Buttons:** Select Positions, Print Report, Cancel

Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report you may enter the starting and ending date. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following data fields.

| Field | Description |
|-------------------|--|
| Employee | When this field is checked the name of the employee having position will be printed on the report. |
| Position | When this field is checked the description of the position will be printed on the report. |
| Start Date | When this field is checked the starting date for the employee in that position will be printed on the report. |
| End Date | When this field is checked the ending date for the employee in that position will be printed on the report. |
| Badge | When this field is checked the badge number of the employee having the position will be printed on the report. |

Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee Name
- Position - User Defined Position Code

Select Positions Selection

To choose selected positions for the Position Assignment Report select the **Select Positions** object.

For instructions on how to select positions refer to page 6 of the common selection screen chapter.

If you have selected positions the message Exclude Selections or Include Selections will be displayed beside the selection button when you return to the select report object dialog box.

Description Field Selection

The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

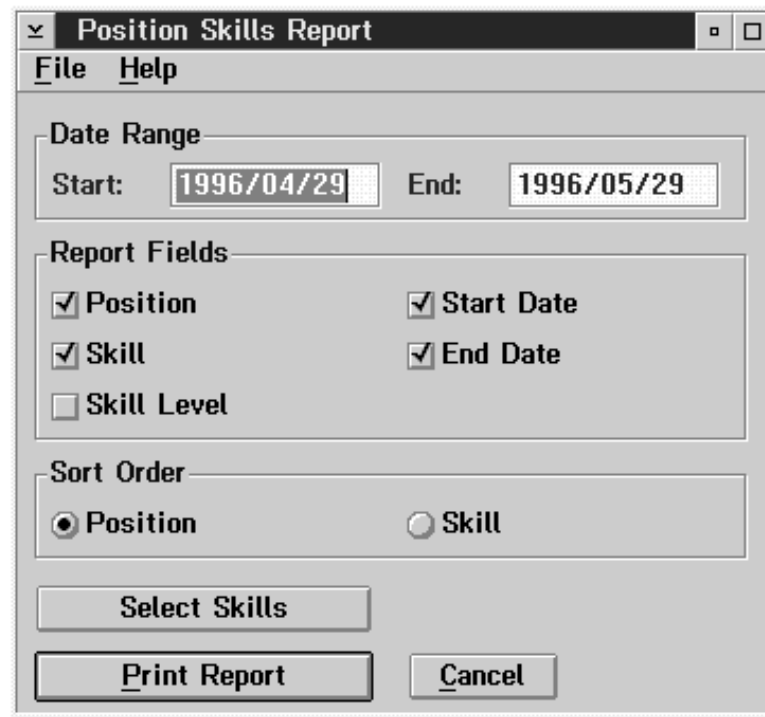
Position Skills Report

The **Position Skills Report** option prints a listing of skills equipment for each position.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the skills to include or exclude in the report.

If a single position was selected before running this program only that position will be printed. The name of the position will be shown after the report name at the top of the window when a single position has been selected.

This dialog box for the **Position Skills Report** option in the Reports menu appears as follows:



Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following data fields.

| Field | Description |
|--------------------|---|
| Position | When this field is checked the description of the position will be printed on the report |
| Skill | When this field is checked the description of the skill will be printed on the report. |
| Start Date | When this field is checked the starting date of the skill for the position will be printed on the report. |
| End Date | When this field is checked the ending date of the skill for the position will be printed on the report. |
| Skill Level | When this field is checked the skill level for the position will be printed on the report. |

Sort Order Selection

The sort order selection for the report allows for the following sort order selections:

- Position - User Defined Position Code
- Skill - User Defined Skill Code

Select Skills Selection

To choose skills for the Position Skills Report select the Select Skills object.

For instructions on how to select skills refer to page 14 of the common selection screen chapter.

If you have selected positions the message Exclude Selections or Include Selection will be displayed beside the selection button when you return to the select report object dialog box.

Description Field Selection

The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

Position Table Report

The **Position Table Report** option prints a listing of Position Information.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the object to include or exclude in the report.

If a single position was selected before running this program only that position will be printed. The name of the position will be shown after the report name at the top of the window when a single position has been selected. The **Select Positions** option will not be available when a single position has been selected.

The dialog box for the **Position Table Report** option in the Reports menu appears as follows:

The dialog box titled "Position Table Report" features a menu bar with "File" and "Help". It is divided into three main sections:

- Date Range:** Contains two text input fields. The "Start" field is set to "1996/08/15" and the "End" field is set to "1996/09/14".
- Report Fields:** A list of nine checkboxes, all of which are checked:
 - Position
 - Start Date
 - Description
 - Type
 - End Date
 - Distribution
 - Class
 - Pay Table
 - Hour Allocation
- Sort Order:** Contains two radio buttons. "Position Code" is selected, while "Position Description" is unselected.

At the bottom of the dialog, there are three buttons: "Select Positions", "Print Report", and "Cancel".

Saving...

The selections made by the user can be saved by selecting the **Save Parameters** in the File menu.

Date Range Selection

To limit the range of the report you may enter the starting and ending date. If both dates are zero the entire report will be printed. If only the ending date is zero both the report will be printed from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following nine data fields.

| Field | Description |
|------------------------|---|
| Position | When this field is checked the position will be printed on the report. |
| Description | When this field is checked the description of the position will be printed on the report. |
| Type | When this field is checked the position type code will be printed on the report. |
| Class | When this field is checked the position class code will be printed on the report. |
| Start Date | When this field is checked the starting date of the position will be printed on the report. |
| End Date | When this field is checked the ending date of the position will be printed on the report. |
| Pay Table | When this field is checked the pay table will be printed on the report. |
| Distribution | When this field is checked the distribution will be printed on the report. |
| Hour Allocation | When this field is checked the position hour allocation will be printed on the report. |

Sort Order Selection

The sort order selection for the report allows for the following sort order selections:

- Position Code - User Defined Code
- Position Description - User Defined Description

Select Positions Selection

To choose selected positions for the Position Assignment Report select the **Select Positions** object.

For instructions on how to select positions refer to page 6 of the common selection screen chapter.

If you have selected positions the message Exclude Selections or Include Selections will be displayed beside the selection button when you return to the select report object dialog box.

Description Field Selection

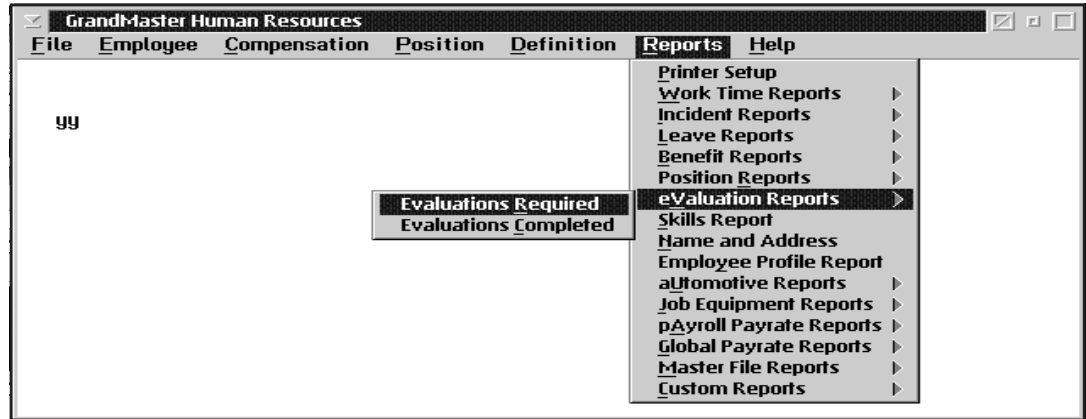
The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

Evaluation Reports

The Evaluation Reports sub menu appears as follows:



The following evaluation reports are available:

- Evaluations Required
- Evaluations Completed

Evaluations Required

The **Evaluations Required** option presents a listing of required evaluation for each employee.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the evaluation types to be included or excluded in the report .

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report name at the top of the window when a single employee has been selected.

The dialog box for the evaluations required option in the reports menu appears as follows:

Evaluations Required Report

File Help

Date Range

Start: 1996/04/25 End: 1996/05/25

Report Fields

Employee Comments Review Date
 Evaluation Type Badge Start Date
 Performance Position End Date

Sort Order

Employee
 Evaluation Type

Comments Field

Full Comments
 First Paragraph

Select Types

Print Report Cancel

Date Range Selection

To limit the range of the report the starting and ending date may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The data field selection for the report allows for the inclusion of the following 9 data fields.

| Field | Description |
|------------------------|---|
| Employee | When this field is checked the name of the employee for the required evaluation will be printed on the report. |
| Evaluation Type | When this field is checked the evaluation type of the required evaluation will be printed on the report. |
| Start Date | When this field is checked the starting date for the required evaluation will be printed on the report. |
| End Date | When this field is checked the ending date for the required evaluations will be printed on the report. |
| Review Date | When this field is checked the review date for the required evaluations will be printed on the report. |
| Performance | When this field is checked the performance of the employee for the required evaluation will be printed on the report. |
| Position | When this field is checked the position comments for the required evaluation will be printed on the report. |
| Badge | When this field is checked the badge number for the requiring evaluation will be printed on the report. |
| Comments | When this field is checked the comments for the required evaluation will be printed on the report. |

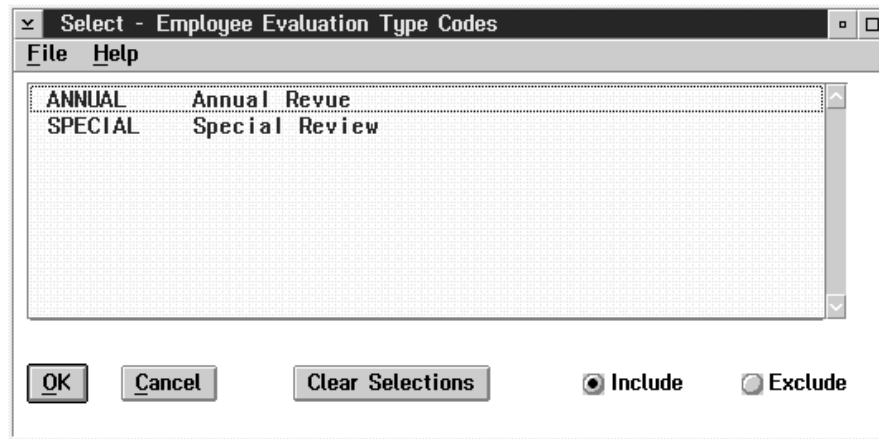
Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee Name
- Evaluation Type - Type of evaluation

Select Types Selection

To choose selected evaluation types for the Evaluation Required, push the select types button. A list of all defined types will appear as follows:



The evaluation types are selected by clicking on the desired evaluation types with the mouse once, this evaluation type will now be highlighted. Any number of evaluation types may be selected by repeating this procedure.

When all the desired evaluation types are selected press the OK button.

To de-select a single evaluation type simply click on the highlighted evaluation types and it will no longer be selected. To de-select all the selected evaluation type push the **Clear Selections** button.

When you are selecting certain evaluation types you may include or exclude all the selected evaluation types in the report. This is done by clicking on the Include or Exclude objects.

Description Field Selection

The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

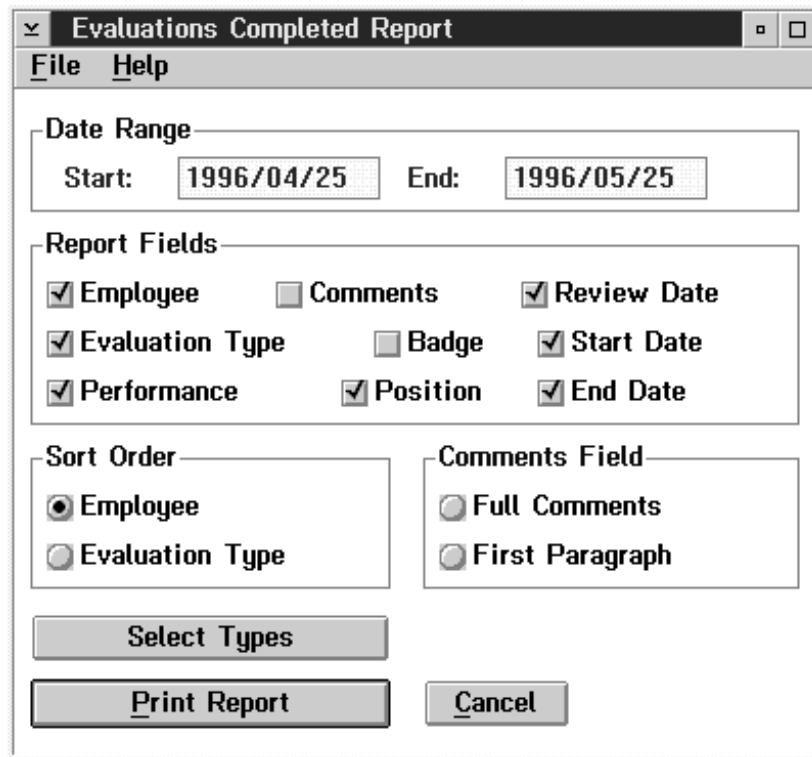
Evaluations Completed

The **Evaluation Completed Report** option presents a listing of other completed evaluations for each employee.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the object to include or exclude in the report .

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report name at the top of the window when a single employee has been selected.

The dialog box for the **Evaluations Completed** option in the reports menu appears as follows:



Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The report field selection for the report allows for the inclusion of the following 9 data fields.

| Field | Description |
|------------------------|---|
| Employee | When this field is checked the name of the employee for the completed evaluation will be printed on the report. |
| Evaluation Type | When this field is checked the type of evaluation for the completed evaluation will be printed on the report. |
| Start Date | When this field is checked the starting date for the completed evaluation will be printed on the report. |
| End Date | When this field is checked the ending date for the completed evaluation will be printed on the report. |
| Performance | When this field is checked the performance for the completed evaluation will be printed on the report. |
| Position | When this field is checked the position of the employee for the completed evaluation will be printed on the report. |
| Badge | When this field is checked the badge number for the completed evaluation will be printed on the report. |
| Description | When this field is checked the description for the completed evaluation will be printed on the report. |

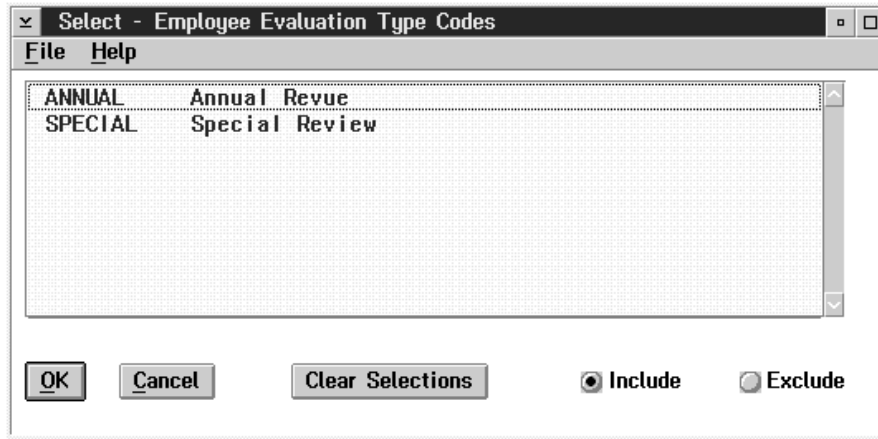
Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee Name
- Evaluation Type - Type of Evaluation

Select Types Selection

To choose selected Evaluation Types for the report click on the **Select Type** button. A list of all defined types will appear as follows:



The Evaluation Types are selected by clicking on the desired evaluation type with the mouse once, this evaluation type will now be highlighted. Any number of evaluation types may be selected by repeating this procedure.

When all the desired evaluation types are selected press the OK button.

To de-select a single evaluation type simply click on the highlighted evaluation type and it will no longer be selected. To de-select all the selected evaluation type push the Clear Selections button.

When you are selecting certain evaluation types you may include or exclude all the selected evaluation types in the report. This is done by clicking on the Include or Exclude objects.

Description Field Selection

The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

Skills Report

The **Skills Report** option prints a listing of the skills for each employee.

This function allows the user to select the date range for the report, the data fields to be included in the report, the sort order for the report, and to select the skills to be included or excluded in the report .

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report title at the top of the window when only one employee is selected.

The dialog box for the **Skills Report** option in the reports menu appears as follows:

The screenshot shows a dialog box titled "Skills Report" with a menu bar containing "File" and "Help". The dialog is divided into three main sections:

- Date Range:** Contains two text input fields. The "Start" field is set to "1996/04/25" and the "End" field is set to "1996/05/25".
- Report Fields:** Contains six checkboxes arranged in two rows. The first row has "Employee" (checked), "Start Date" (checked), and "Skill" (checked). The second row has "Badge" (unchecked), "End Date" (checked), and "Skill Level" (unchecked).
- Sort Order:** Contains two radio buttons. "Employee" is selected (indicated by a filled circle), and "Skill" is unselected (indicated by an empty circle).

At the bottom of the dialog, there are three buttons: "Select Skills", "Print Report", and "Cancel".

Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending date may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The report field selection for the report allows for the inclusion of the following 6 data fields.

| Field | Description |
|--------------------|---|
| Employee | When this field is checked the employee having skill will be printed on the report. |
| Badge | When this field is checked the badge number of the employee having the skill will be printed on the report. |
| Start Date | When this field is checked the starting date of the skill will be printed on the report. |
| End Date | When this field is checked the ending date of the skill will be printed on the report. |
| Skill | When this field is checked the skill description will be printed on the report. |
| Skill Level | When this field is checked the skill level for the skill will be printed on the report. |

Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee Name
- Skill - Skill code of user defined skills

Select Skill Selection

To choose skills for the Skills Report select the **Select Skills** object.

For instructions on how to select skills refer to page 14 of the common selection screen chapter.

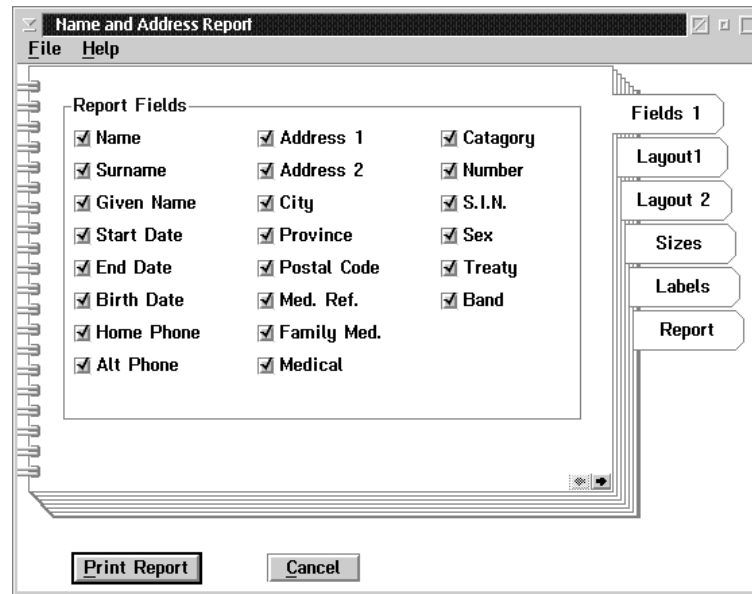
If you have selected positions the message Exclude Selections or Include Selections will be displayed beside the selection button when you return to the select report object dialog box.

Name and Address Report

The Name and Address Report option prints a listing of the Employee name and addresses.

This function allows the user to select the data fields to include in the report, the name and address layout, and to select a single employee for the report.

The dialog box for the Name and Address Report option in the report menu appears as follows:



Saving...

The selections made by the user can be saved by selecting the Save Parameters in the File menu.

Report Fields Selection

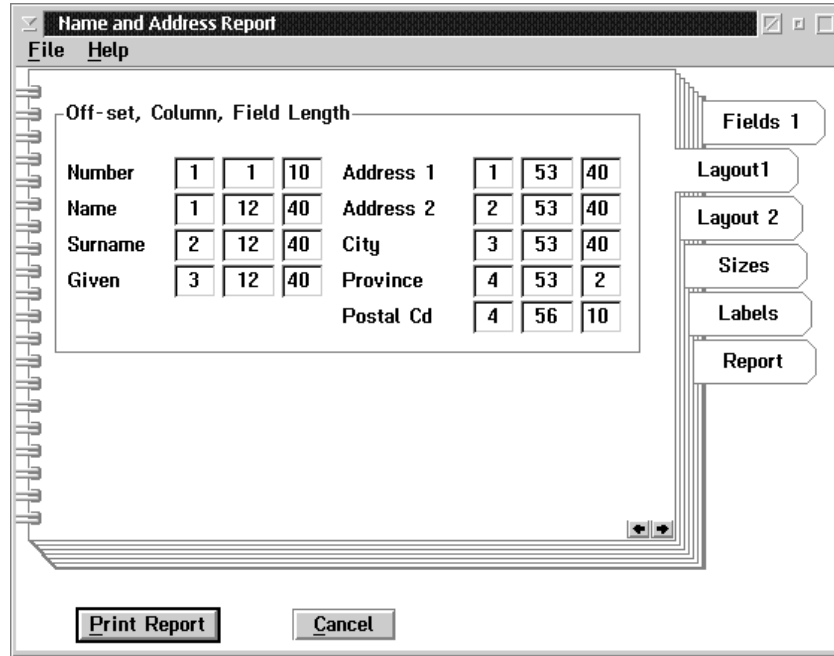
A data field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following data fields:

| Field | Description |
|--------------|--|
| Name | When this field is checked the name of the employee in the name and address report will be printed. |
| Surname | When this field is checked the surname of the employee in the name and address report will be printed. |
| Given Name | When this field is checked the given name of the employee in the name and address report will be printed. |
| Start Date | When this field is checked the starting date of the name and address report will be printed. |
| End Date | When this field is checked the ending date of the name and address report will be printed. |
| Birth Date | When this field is checked the birth date of the employee for the name and address report will be printed. |
| Medical Ret. | When this field is checked the medical ret. of the name and address report will be printed. |
| Medical | When this field is checked the medical of the name and address report will be printed. |
| Family Med. | When this field is checked the family med. of the name and address report will be printed. |
| Home Phone | When this field is checked the home phone number of the name and address report will be printed. |
| Address 1 | When this field is checked the address 1 of the name and address report will be printed. |
| Address 2 | When this field is checked the address 2 of the name and address report will be printed. |
| City | When this field is checked the city of the name and address report will be printed. |
| Province | When this field is checked the province of the name and address report will be printed. |
| Postal Code | When this field is checked the postal code of the name and address report will be printed. |
| Alt. Phone | When this field is checked the alt. phone number of the name and address report will be printed. |
| Badge | When this field is checked the badge number of the name and address report will be printed. |
| Number | When this field is checked the number of the name and address report will be printed. |
| S.I.N. | When this field is checked the S.I.N. of the name and address report will be printed. |
| Sex | When this field is checked the sex of the name and address report will be printed. |
| Category | When this field is checked the category of the name and address report will be printed. |
| Treaty | When this field is checked the treaty of the name and address report will be printed. |
| Band | When this field is checked the band of the name and address report will be printed. |

Layout 1 Selection

The dialog box for the name and address report layout appears as follows:

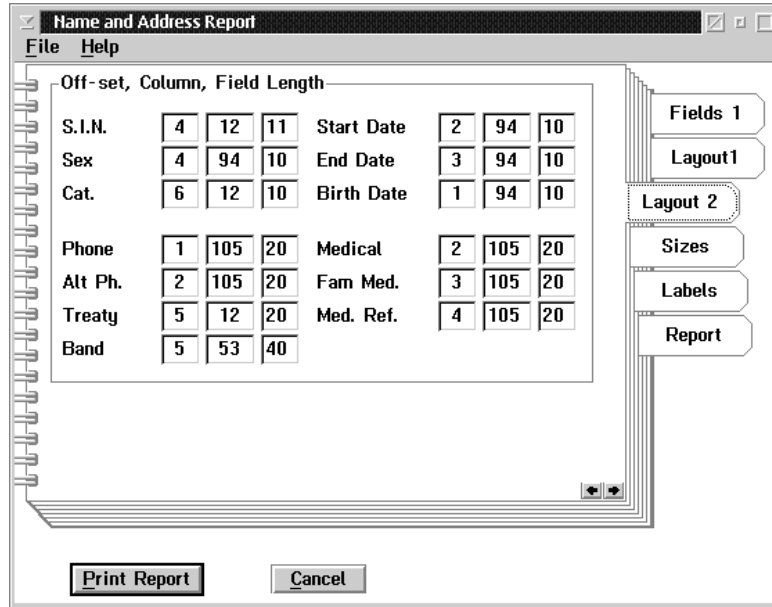


Defaults

The default selections can be re-displayed by selecting the default selections in the file menu. If you wish to always use the defaults select the Save Parameter option in the file menu.

Layout 2 Selection

The second dialog box for the name and address report layout appears as follows:



Defaults

The default selections can be re-displayed by selecting the default selections in the file menu. If you wish to always use the defaults select the Save Parameter option in the File menu.

In order to design a report layout you must specify the following 3 things:

- Off-Set
- Column
- Field Length

Off-Set

This is the line offset used for printing the name and address information. Eg) If you want this field to print on the first line of this name and address information use an off-set of zero. If it is to follow on the second line use off-set of 1. You may have as many off-sets as you need to print all the fields you have selected.

Column

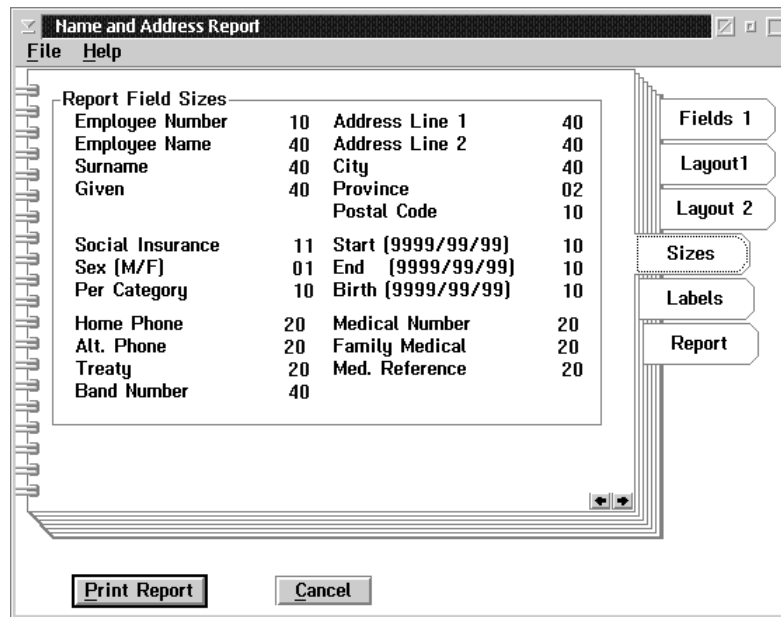
This is the character position on the print line for the name and address information. Eg) If the field is to start 5 spaces in from the left hand margin enter a 6 in the column field. The column numbers are only limited by the number of characters you can print on each line of your selection page.

Field Length

This is the number of characters that make up the field. Eg) Employee number is 10 characters long. If you want to see the entire employee number enter 10 in the field length. If you are doing the date which is 10 characters you may choose to print only the last 5 giving you mm/dd. The date field is the only field that takes the characters from the right hand side.

Sizes Selection

The following dialog box for the name and address report appears as follows:



This screen shows the standard length of the data fields that can be printed.

Label Selection The following dialog box for the name and address report appears as follows:



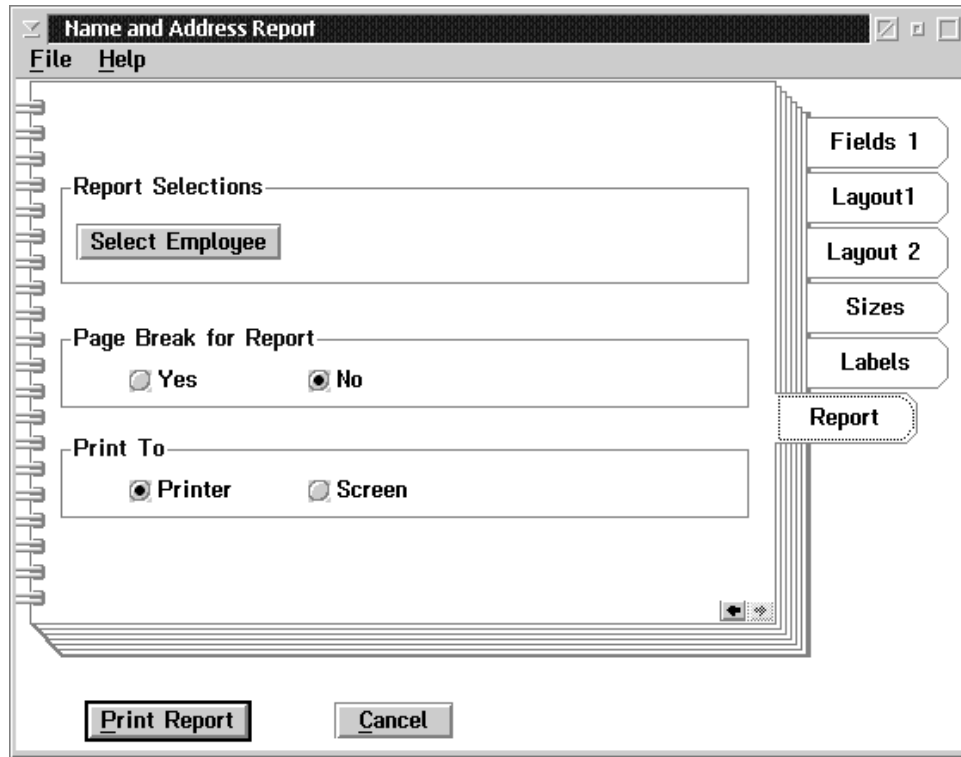
This screen is used to set the values for printing employee labels.

The following table gives a description of the screen:

| Field | Description |
|-------------------------------|--|
| Number of Lines on the Label | This field contains the physical length of the label in print lines. |
| Start Printing on Line Number | This field contains the first physical line to print on the label. |
| Label Legend | This button allows you to print filed names on the label. |
| Position | This button is used to position the field names to the left of the date or above the data. |

Select Report Selection

The dialog box for the name and address report appears as follows:



Single Employee Option

To choose a single employee option for the Name and Address report select the Single Employee object.

For instructions on how to select a single employee option refer to page 13 of the common selection screen chapter.

This report allows you the option to print each employee on a separate page. Select the page break yes. When this is selected the box to the left of the field has a check mark.

Employee Profile Report

When the user selects Employee Profile the following screen will appear:

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Sort Order Selection

The sort order selection for the report allows for the following sort order selections:

- Name
- Number

Page Break Selection

The page break selection for the report allows for the following report to be printed to the report or on the screen

- Yes
- No

Print To Selection

The Print to Selection for the report allows for the following report to be printed to the printer or on the screen

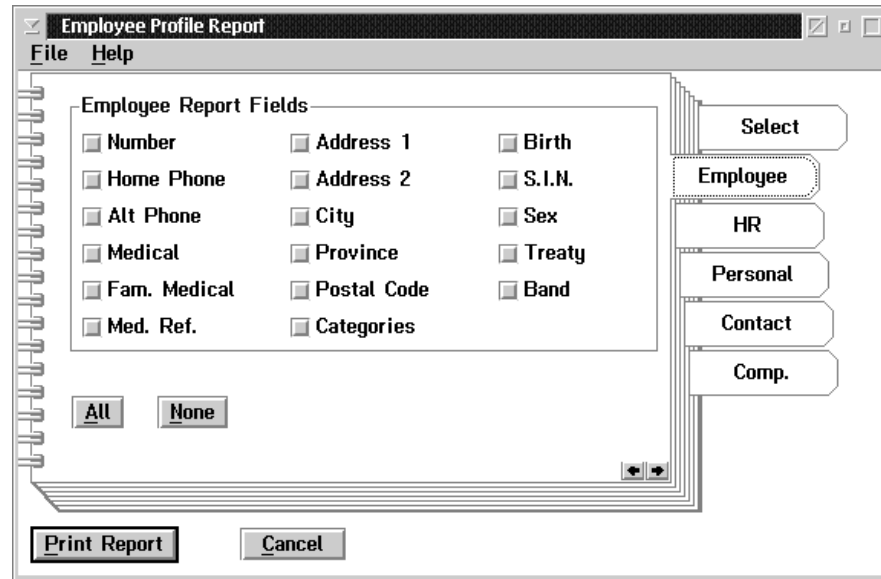
- Printer
- Screen

Select Employee Selection

To choose a single employee option for the Employee Profile Report select the Select Employee Option.

For instructions on how to select an employee refer to the common selection screen chapter in the common manual.

The employee tab from the Employee Profile Report appears as follows:



Data Field Selection

A data field is selected when the box to the left of the field has a check mark.

The data field selection for the report allows for the inclusion of the following data fields:

| Field | Description |
|--------------|--|
| Number | When this field is checked the employee number will be printed. |
| Phone Number | When this field is checked the employee's phone number will be printed. |
| Alt Phone | When this field is checked an alternate phone number will be printed. |
| Medical | When this field is checked the medical number of the employee will be printed. |
| Fam. Medical | When this field is checked the family medical number will be printed. |
| Med. Ref. | When this field is checked the employee's doctor's name or any other care giver will be printed. |
| Address 1 | When this field is checked the address of the employee will be printed. |
| Address 2 | When this field is checked an alternate address for the employee will be printed. |
| City | When this field is checked the city of the employee will be printed. |
| Province | When this field is checked the province of the employee will be printed. |
| Postal Code | When this field is checked the postal code of the employee will be printed. |
| Categories | When this field is checked the category you want to sort employee's by such as by union will be printed. |
| Birth | When this field is checked the birth date of the employee will be printed. |
| S.I.N. | When this field is checked the social insurance number of the employee will be printed. |
| Sex | When this is checked the sex of the employee will be printed . |
| Treaty | When this field is checked the treaty number of the employee will be printed. |
| Band | When this field is checked the band number of the employee will be printed. |

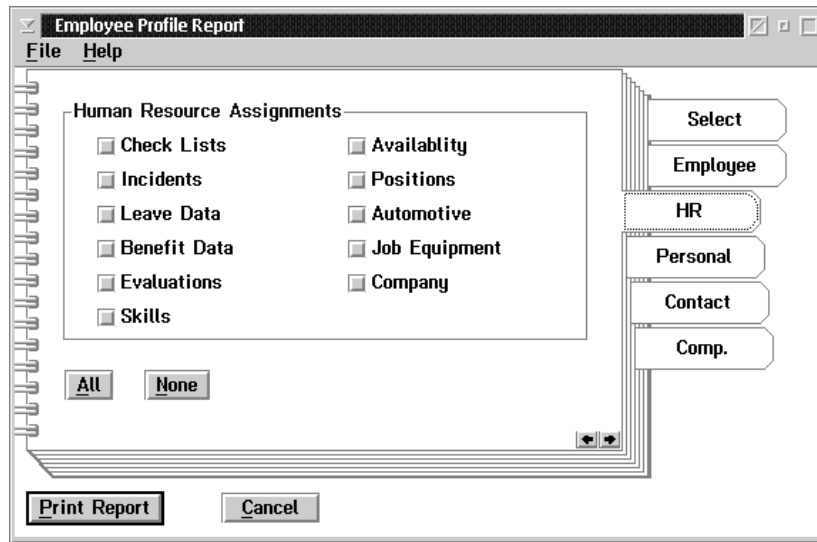
All

The All button will flag all the fields on the screen for printed on the report.

None

The None button will remove all the flags on the fields on the screen so they will not print on the report.

When the HR tab is chosen for the Employee Profile the following screen will appear:



Data Field Selection

A data field is selected when the box to the left of the field has a check mark.

The data field selection for the report allows for the inclusion of the following data fields:

| Field | Description |
|---------------|--|
| Check List | When this field is checked the check list assignment will be printed. |
| Incidents | When this field is checked the incident assignment will be printed. |
| Leave Data | When this field is checked the leave data assignment will be printed. |
| Benefit Data | When this field is checked the benefit data assignment will be printed. |
| Evaluations | When this field is checked the evaluations assignment will be printed. |
| Skills | When this field is checked the skills assignment will be printed. |
| Availability | When this field is checked the availability assignment will be printed. |
| Positions | When this field is checked the position assignment will be printed. |
| Automotive | When this field is checked the automotive assignment will be printed. |
| Job Equipment | When this field is checked the job equipment assignment will be printed. |
| Company | When this field is checked the company assignment will be printed. |



For each assignment the code name and description as well as the starting and ending date will be printed.

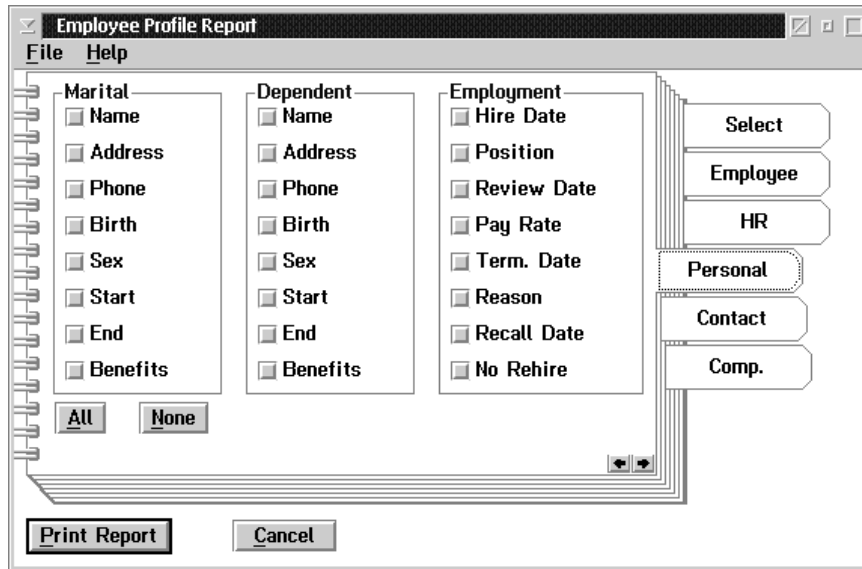
All

The All button will flag all the fields on the screen for printing on the report.

None

The None button will remove all the flags on the fields on the screen so they will not print on the report.

When the Personal tab for the Employee Profile Report is chosen the following screen will appear:



Data Field Selection

A data field is selected when the box to the left of the field has a check mark.

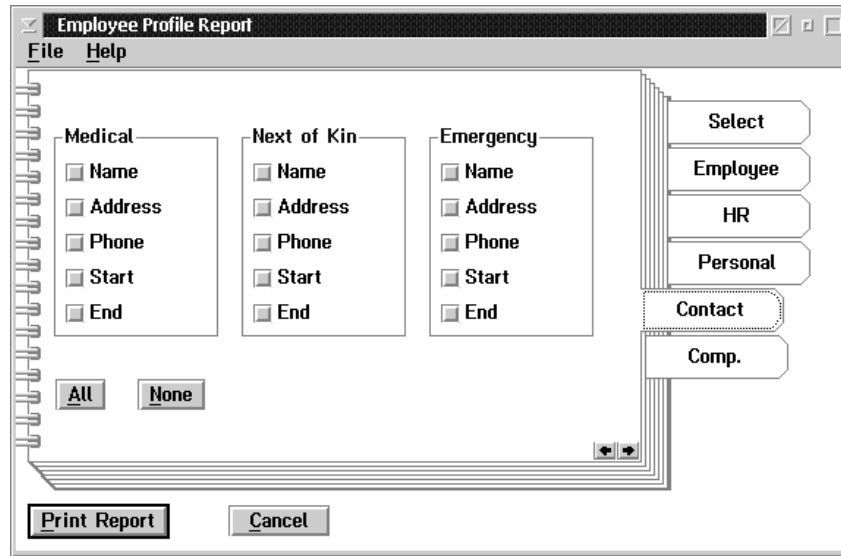
The data field selection for the report allows for the inclusion of the following data fields:

| Field | Description |
|-------------------|--|
| Marital | |
| Name | When this field is checked the employee spouse's name will be printed. |
| Address | When this field is checked the address of the employee's spouse will be printed. |
| Birth | when this field is checked the birth date of the employee's spouse will be printed. |
| Sex | When this field is checked the sex of the employee's spouse will be printed. |
| Start | When this field is checked the day the employee got married will be printed. |
| End | When this field is checked the day the employee got divorced will be printed. |
| Benefits | When this field is checked the employee's spouse is entitled to benefits. |
| Dependant | |
| Name | When this field is checked the employee's dependants will be printed. |
| Address | When this field is checked the address of the employee's dependant will be printed. |
| Birth | When this field is checked the birth date of the employee's dependant will be printed. |
| Sex | When this field is checked the sex of the employee's dependant will be printed. |
| Start | When this field is checked the start date of the employee's relationship with the dependant will be printed. |
| End | When this field is checked the end date of the employee's relationship with the dependant will be printed. |
| Benefits | When this field is checked the dependant is entitled to benefits. |
| Employment | |
| Hire Date | When this field is checked the date the employee was hired will be printed. |
| Position | When this field is checked the position of the employee will be printed. |
| Review Date | When this field is checked the employee's review date will be printed. |
| Pay Rate | When this field is checked the pay rate of the employee will be printed. |
| Term Date | When this field is checked the employee's termination date will be printed. |
| Reason | When this field is checked the reason the employee was terminated will be printed. |
| Recall Date | When this field is checked the date the employee will be recalled will be printed. |
| No Rehire | When this field is checked the employee will not be rehired. |

All The All button will flag all the fields on the screen for printing on the report

None The None button will remove all the flags on the screen so the fields will not print on the report.

When the contact tab is chosen for the Employee Profile the following screen will appear:



Data Field Selection

A data field is selected when the box to the left of the field has a check mark.

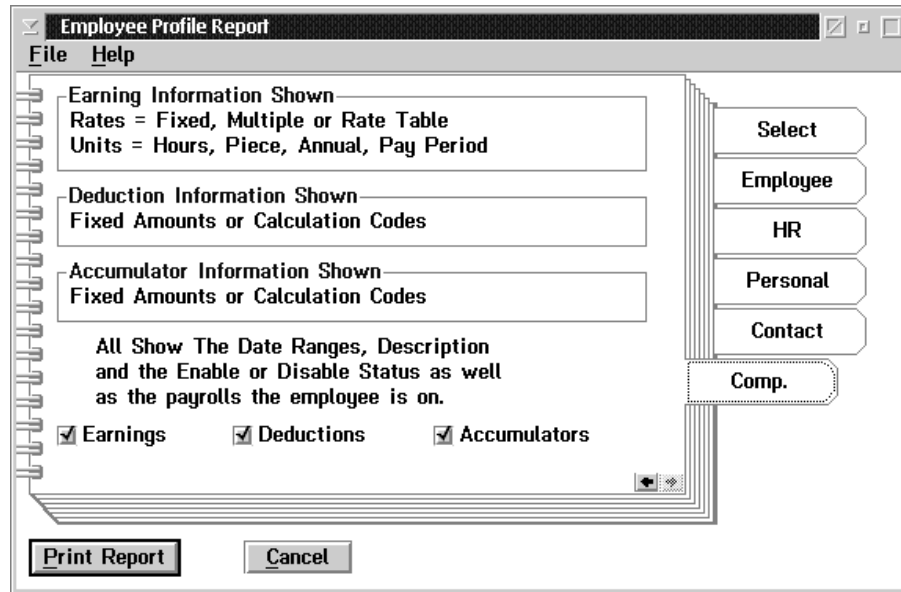
The data field selection for the report allows for the inclusion of the following data fields:

| Field | Description |
|--------------------|---|
| Medical | |
| Name | When this field is checked the name of the doctor of the employee will be printed. |
| Address | When this field is checked the address of the doctor will be printed. |
| Phone | When this field is checked the phone number of the doctor will be printed. |
| Start | When this field is checked the starting date of the employee's relationship with the doctor will be printed. |
| End | When this field is checked the ending date of the employee's relationship with the doctor will be printed. |
| Next of Kin | |
| Name | When this field is checked the next of kin of the employee will be printed. |
| Address | When this field is checked the address of the next of kin of the employee will be printed. |
| Phone | When this field is checked the phone number of the next of kin will be printed. |
| Start | When this field is checked the starting date of the employee's relationship with the next of kin will be printed. |
| End | When this field is checked the ending date of the employee's relationship with the next of kin will be printed. |
| Emergency | |
| Name | When this field is checked the name of the person to contact in the case of emergency will be printed. |
| Address | When this is checked the address of the person to contact in case of emergency will be printed. |
| Phone | When this field is checked the phone number of the person to contact in the case of emergency will be printed. |
| Start | When this field is checked the starting date of the employee's relationship with the person to contact in a case of an emergency will be printed. |
| End | When this field is checked the ending date of the employee's relationship with the person to contact in a case of an emergency will be printed. |

All The All button will flag all the fields on the screen for printing on the report.

None The None button will remove all the flags on the fields on the screen so they will not print on the report.

When the compensation tab is chosen for the Employee Profile report the following screen will appear:



Earnings

If the earning flag is set the following information for the earning code will be printed.

- All show the date ranges, description and the enable or disable status as well as the payrolls the employee is on.
- Rates = Fixed, Multiple or Rate Table
- Units = Hours, Piece, Annual, Pay Period

Deductions

If the deduction flag is set the following information for the deduction code will be printed.

- All show the date ranges, description and the enable or disable status as well as the payrolls the employee is on.
- Fixed amounts or Calculation Codes

Accumulators

If the accumulator flag is set the following information for the accumulator code will be printed.

- All show the date ranges, description and the enable or disable status as well as the payrolls the employee is on.
- Fixed Amounts or Calculation Codes

Automotive Reports

The Automotive Reports menu bar appears as follows:



The following Automotive Reports are available:

- Parking Spaces Report
- Vehicle Assignments Reports

Parking Report

The **Parking Report** option presents a listing of other parking assignments for each employee.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the parking assignments to include or exclude in the report .

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report name at the top of the window when a single employee has been selected.

The dialog box for the **Parking Report** option in the reports menu appears as follows:

The screenshot shows a dialog box titled "Parking Report" with a menu bar containing "File" and "Help". The dialog is organized into several sections:

- Date Range:** Contains two date input fields. The "Start:" field is set to "1996/08/15" and the "End:" field is set to "1996/09/14".
- Report Fields:** A list of six fields, each with a checked checkbox: "Employee", "Object", "Badge", "Start Date", "End Date", and "Start Time", "End Time".
- Sort Order:** Two radio buttons are present. The "Employee" radio button is selected, while the "Object" radio button is unselected.
- Buttons:** At the bottom of the dialog, there are three buttons: "Select Objects", "Print Report", and "Cancel".

Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report you may enter the starting and ending dates. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The report field selection for the report allows for the inclusion of the following 7 data fields.

| Field | Description |
|-------------------|--|
| Employee | When this field is checked the employee having the parking assignment will be printed on the report. |
| Object | When this field is checked the description of the parking assignment will be printed on the report. |
| Badge | When this field is checked the badge number of the employee having the parking assignment will be printed on the report. |
| Start Date | When this field is checked the starting date for the parking will be printed on the report. |
| End Date | When this field is checked the ending date for the parking assignment will be printed on the report. |
| Start Time | When this field is checked the starting time for the parking assignment will be printed on the report. |
| End Time | When this field is checked the ending time for the parking assignment will be printed on the report. |

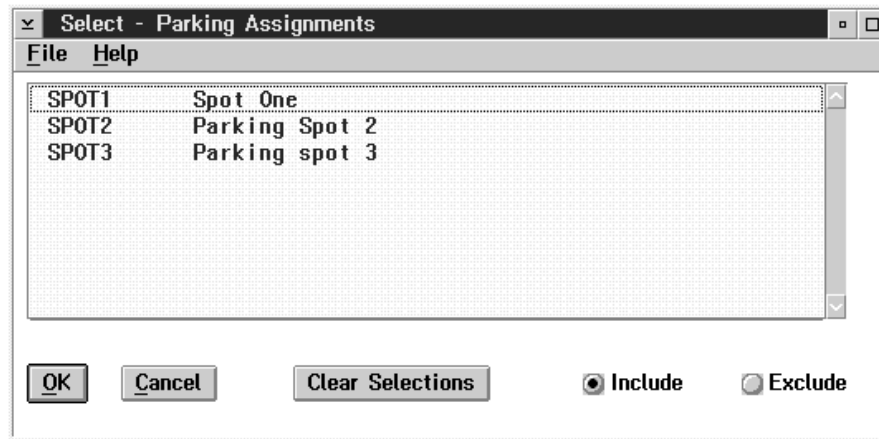
Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee Name
- Object - User defined parking codes

Select Objects Selection

To choose parking assignments for the report push the Select Objects button. A list of all defined objects will appear as follows:



The parking assignments are selected by clicking on the desired assignments with the mouse once, this assignment will now be highlighted. Any number of assignments may be selected by repeating this procedure.

When all the desired assignments are selected press the OK button.

To de-select a single parking object simply click on the highlighted assignment and it will no longer be selected. To de-select all the selected assignments click on the **Clear Selections** button.

When you are selecting certain assignments you may include or exclude all the selected parking assignments in the report. This is done by clicking on the Include or Exclude object.

If you have selected assignments the message EXCLUDE SELECTIONS or INCLUDE SELECTIONS will be displayed beside the Select Objects button.

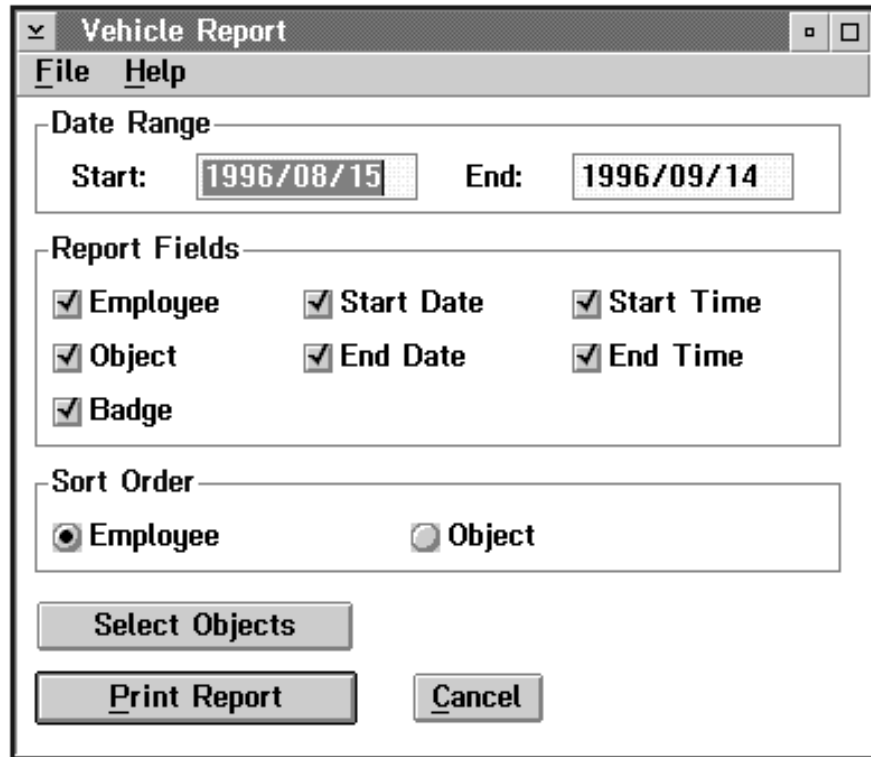
Vehicle Assignment Report

The **Vehicle Assignment Report** option presents a listing of vehicle assignments for each employee.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the vehicle assignment to be included or excluded in the report .

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report names at the top of the window when a single employee has been selected.

The dialog box for the **Vehicle Assignment Report** option in the reports menu appears as follows:



Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report enter the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following 7 data fields.

| Field | Description |
|-------------------|--|
| Employee | When this field is checked the employee having vehicle assignment will be printed on the report. |
| Object | When this field is checked the description of the vehicle assignment will be printed on the report. |
| Badge | When this field is checked the badge number of the employee having the vehicle assignment will be printed on the report. |
| Start Date | When this field is checked the starting date for the vehicle assignment will be printed on the report. |
| End Date | When this field is checked the ending date for the vehicle assignment will be printed on the report. |
| Start Time | When this field is checked the starting time for the vehicle assignment will be printed on the report. |
| End Time | When this field is checked the ending time for the vehicle assignment will be printed on the report. |

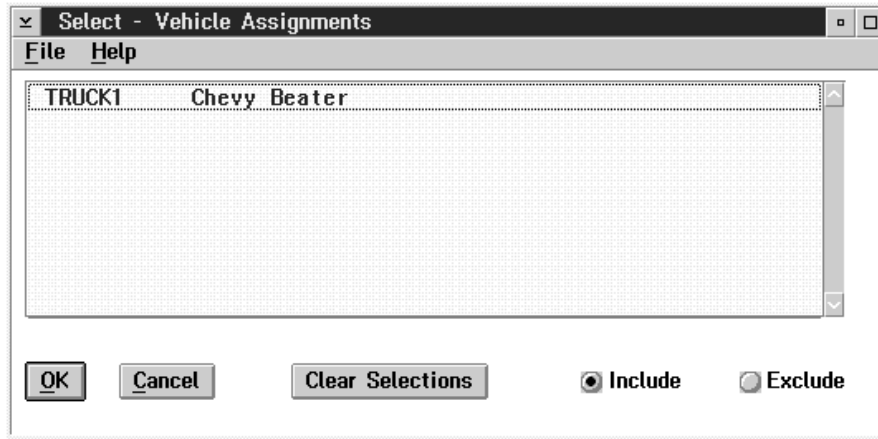
Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee Name
- Object - User defined vehicle assignment

Select Objects Selection

To choose Vehicle Assignment for the report push the **Select Objects** button. A list of all defined objects will appear as follows:



The Vehicle Assignment are selected by clicking on the desired vehicle assignment with the mouse once, this assignment will now be highlighted. Any number of vehicle assignments may be selected by repeating this procedure.

When all the desired vehicle assignments are selected press the **OK** button.

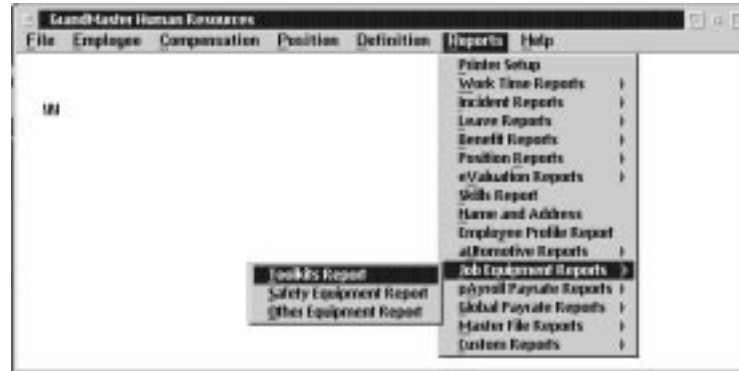
To de-select a single assignment simply click on the highlighted vehicle assignment and it will no longer be selected. To de-select all the selected assignments click on the **Clear Selections** button.

When you are selecting certain assignments you may include or exclude all the selected assignments in the report. This is done by clicking on the **Include** or **Exclude** object.

If you have selected assignments the message **EXCLUDE SELECTIONS** or **INCLUDE SELECTIONS** will be displayed beside the **Select Objects** button.

Job Equipment Reports

The Job Equipment Reports menu bar appears as follows:



The following Job Equipment Reports are available:

- Toolkits Report
- Safety Equipment Report
- Other Equipment Report

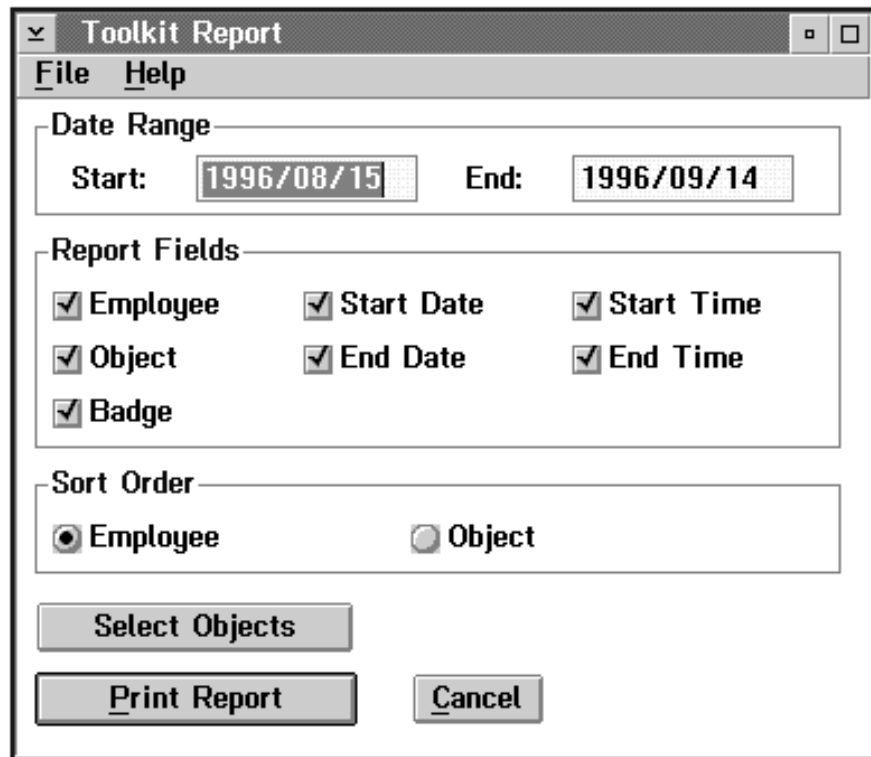
Toolkits Report

The **Toolkits Report** option presents a listing of the tool kits for each employee.

This function allows the user to select the date range for the report, the data fields to included in the report, the sort order for the report, and to select the toolkits to be included or excluded in the report .

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report name at the top of the window when a single employee has been selected.

The dialog box for the **Toolkits Report** option in the reports menu appears as follows:



Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending date may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Fields Selection

A report field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following 7 data fields.

| Field | Description |
|-------------------|---|
| Employee | When this field is checked the name of the employee having tool kit will be printed on the report. |
| Object | When this field is checked the description of the tool kit assignment will be printed on the report. |
| Badge | When this field is checked the badge number of the employee having the tool kit assignment will be printed on the report. |
| Start Date | When this field is checked the starting date for the tool kit assignment will be printed on the report. |
| End Date | When this field is checked the ending date for the tool kit assignment will be printed on the report. |
| Start Time | When this field is checked the starting time for the toolkit assignment will be printed on the report. |
| End Time | When this field is checked the ending time for the toolkit assignment will be printed on the report. |

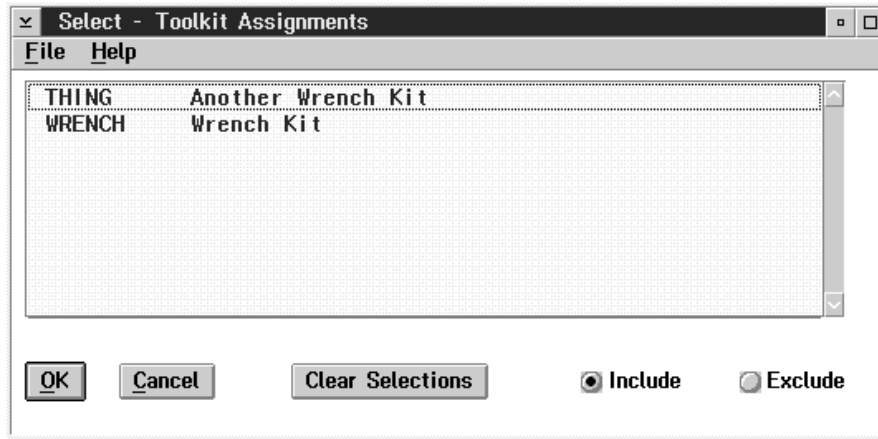
Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee Name
- Object - User defined toolkit

Select Objects Selection

To choose toolkit assignments for the report click on the Select Objects button. A list of all defined objects will appear as follows:



The toolkit objects are selected by clicking on the desired assignment with the mouse once, this assignment will now be highlighted. Any number of assignments may be selected by repeating this procedure.

When all the desired assignments are selected press the OK button.

To de-select a single assignment simply click on the highlighted assignment and it will no longer be selected. To de-select all the selected assignments click on the Clear Selections button.

When you are selecting certain toolkit assignments you may include or exclude all the selected assignments in the report. This is done by clicking on the Include or Exclude objects.

If you have selected assignments the message EXCLUDE SELECTIONS or INCLUDE SELECTIONS will be displayed beside the Select Objects button.

Safety Equipment Report

The **Safety Equipment Report** option presents a listing of the safety equipment for each employee.

This function allows the user to select the date range for the report, the data fields to be included in the report, the sort order for the report, and to select the object to be included or excluded in the report .

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report name at the top of the window when a single employee has been selected.

The dialog box for the **Safety Equipment Report** option in the reports menu appears as follows:

Saving...

The selections made by the user can be saved by selecting the save parameters option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending date may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Fields Selection

A report field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following 7 data fields.

| Field | Description |
|-------------------|---|
| Employee | When this field is checked the name of the employee having the safety equipment assignment will be printed on the report. |
| Object | When this field is checked the description of the safety equipment will be printed on the report. |
| Badge | When this field is checked the badge number of the employee having the safety equipment will be printed on the report. |
| Start Date | When this field is checked the starting date for the safety equipment assignment will be printed on the report. |
| End Date | When this field is checked the ending date for the safety equipment assignment will be printed on the report. |
| Start Time | When this field is checked the starting time for the safety equipment assignment will be printed on the report. |
| End Time | When this field is checked the ending time for the safety equipment assignment will be printed on the report. |

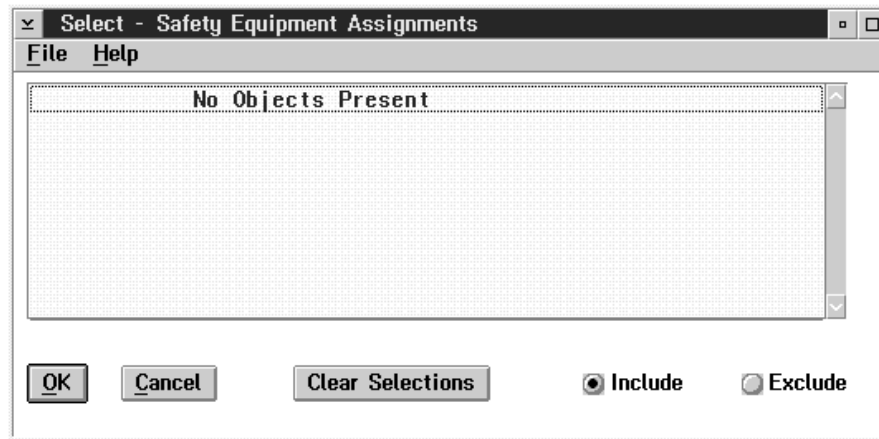
Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee Name
- Object - User defined safety equipment

Select Objects Selection

To choose safety equipment assignments report click on the Select Objects button. A list of all defined objects will appear as follows:



The safety equipment assignments are selected by clicking on the desired assignment with the mouse once, this assignment will now be highlighted. Any number of safety equipment objects may be selected by repeating this procedure.

When all the desired assignments are selected press the OK button.

To de-select a single assignment simply click on the highlighted assignment and it will no longer be selected. To de-select all the selected assignments click on the Clear Selections button.

When you are selecting certain safety equipment assignments you may include or exclude all the selected assignments in the report. This is done by clicking on the Include or Exclude objects.

If you have selected assignments the message EXCLUDE SELECTIONS or INCLUDE SELECTIONS will be displayed beside the Select Objects button.

Other Equipment Report

The **Other Equipment Report** option presents a listing of other equipment assignments for each employee.

This function allows the user to select the date range for the report, the data fields to be included in the report, the sort order for the report, and to select the other equipment to be included or excluded in the report .

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report name at the top of the window when a single employee has been selected.

The dialog box for the **Other Equipment Report** option in the reports menu appears as follows:



Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Fields Selection

A report field is selected for the report when the box to the left of the field has a check mark.

The report field selection for the report allows for the inclusion of the following 7 data fields.

| Field | Description |
|-------------------|---|
| Employee | When this field is checked the name of the employee having other equipment assignment will be printed on the report. |
| Object | When this field is checked the description of the other equipment will be printed on the report. |
| Badge | When this field is checked the badge number of the employee having the other equipment will be printed on the report. |
| Start Date | When this field is checked the starting date for the other equipment assignment will be printed on the report. |
| End Date | When this field is checked the ending date for the other equipment assignment will be printed on the report. |
| Start Time | When this field is checked the starting time for the other equipment assignment will be printed on the report. |
| End Time | When this field is checked the ending time for the other equipment assignment will be printed on the report. |

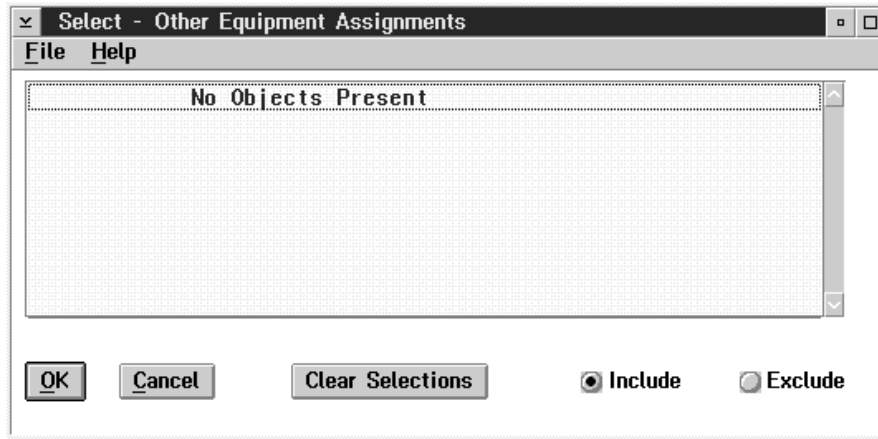
Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee Name
- Object - User defined other equipment

Select Objects Selection

To choose other equipment assignments for the report click on the Select Objects button. A list of all defined objects will appear as follows:



The other equipment assignments are selected by clicking on the desired assignment with the mouse once, this assignment will now be highlighted. Any number of assignments may be selected by repeating this procedure.

When all the desired assignments are selected press the OK button.

To de-select a single assignment simply click on the highlighted assignment and it will no longer be selected. To de-select all the selected assignments click on the Clear Selections button.

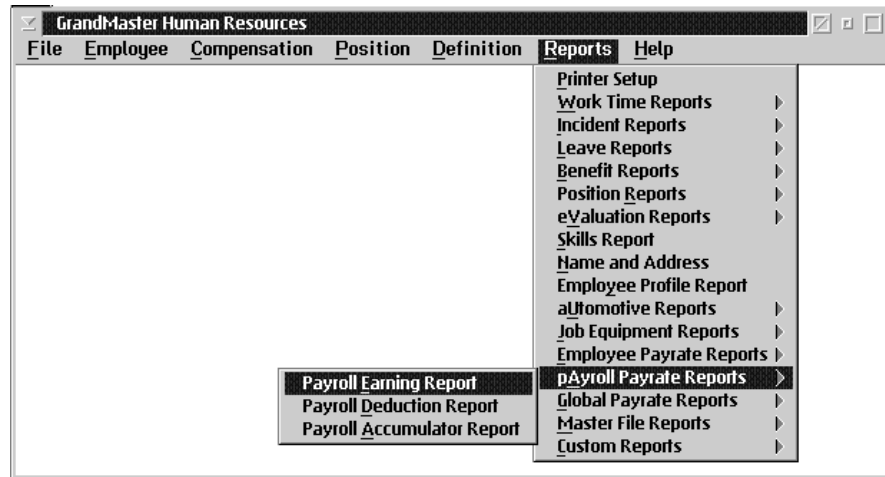
When you are selecting certain assignments you may include or exclude all the selected assignments in the report. This is done by clicking on the include or exclude objects.

If you have selected assignments the message EXCLUDE SELECTIONS or INCLUDE SELECTIONS will be displayed beside the Select Objects button.

Payroll Payrate Reports

The Payroll Payrate Reports menu from the menu bar is used to print payrate reports from the payroll data.

The Payroll Payrate Reports menu appears as follows:



Payroll Payrate Reports

- Payroll Earning Report
- Payroll Deduction Report
- Payroll Accumulator Report
- Payroll Earning Report

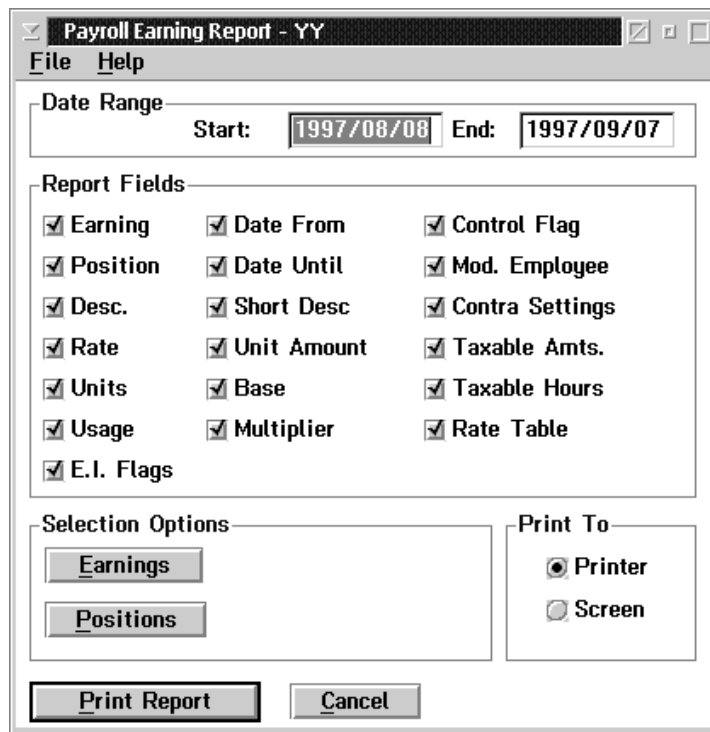
Payroll Earning Report

The **Payroll Earning Report** option prints a listing of the Payroll Payrates for each employee and payroll depending on the menu choice.

This function allows the user to select the date range for the report, the data fields to be included in the report, when to page break, and to select the earning & position to be included in the report.

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report title at the top of the window when only one employee is selected.

The dialog box for the **Payroll Earning Report** option in the reports menu appears as follows:



Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending date may be entered. If both dates are zero the entire report will print from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

| Field | Description |
|------------------------|---|
| Earning | When this field is checked the earning code for the payroll earning will be printed. |
| Position | When this field is checked the position for the payroll earning will be printed. |
| Description | When this field is checked the long description for the payroll earning will be printed. |
| Status | When this field is checked the status for the payroll earning will be printed. |
| Rate | When this field is checked the rate for the payroll earning will be printed. |
| Usage | When this field is checked the usage for the payroll earning will be printed. |
| E.I. Flags | When this field is checked the E.I. For the payroll earning will be printed. |
| Date From | When this field is checked the date the earning is effective from for the payroll earning will be printed. |
| Date Until | When this field is checked the date the earning is effective until for the payroll earning will be printed. |
| Short Desc. | When this field is checked the pay statement description for the payroll earning will be printed. |
| Unit Amount | When this field is checked the earning unit amount for the payroll earning will be printed. |
| Base | When this field is checked the base earning to calculate multiples on or for the payroll earning will be printed. |
| Multiplier | When this field is checked the multiplier for the payroll earning will be printed. |
| Control Flag | When this field is checked the control flag for the payroll earning will be printed. |
| Mod. Employee | When this field is checked the message if the earning is modifiable employee for payroll earning will be printed. |
| Contra Settings | When this field is checked the contra setting for the payroll earning will be printed. |
| Taxable Amounts | When this field is checked the taxable amount for the payroll earning will be printed. |
| Taxable Hours | When this field is checked the taxable hours for the payroll earning will be printed. |
| Rate Table | When this field is checked the rate table for the payroll earning will be printed. |

Page Break Selection

If the box to the left of yes has a check mark the report will start each earning object.

Select Earnings Selection

To choose earnings to the Payroll Earning Report select the select earnings object.

For instructions on how to select earnings refer to page 6 of the common payroll selection screen chapter.

Select Positions Selection

To choose selected positions for the Position Assignment Report select the Select Positions object.

For instructions on how to select positions refer to page 9 of the common payroll selection screen chapter.

If you have selected positions the message Exclude Selections or Include Selections will be displayed beside the selection button when you return to the select report object dialog box.

Payroll Deduction Report

The Payroll Deduction Report option prints a listing of the Deduction Payrates for each employee, payroll or global payroll depending on the menu choice.

This function allows the user to select the date range for the report, the data fields to be included in the report, when to page break, and to select the deduction to be included in the report.

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report title at the top of the window when only one employee is selected.

The dialog box for the **Payroll Deduction Report** option in the reports menu appears as follows:

Payroll Deduction Report - YY

File Help

Date Range

Start: 1997/08/11 End: 1997/09/10

Report Fields

Deduction Date From Mod. Employee
 Description Date Until Ben. on Cheque
 Short Desc Parameters Benefit Subject To
 Class Selections Distribute Benefit
 Usage Fixed Amts EFT Deduction
 Calc Code Journalize EFT Benefit

Deductions

Print Report Cancel

Print To

Printer
 Screen

Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending date may be entered. If both dates are zero the entire report will print from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

| Field | Description |
|--------------------|---|
| Deduction | When this field is checked the deduction for the payroll deduction will be printed. |
| Description | When this field is checked the description for the payroll deduction will be printed. |
| Short Desc. | When this field is checked the short description for the payroll deduction will be printed. |
| Class | When this field is checked the class for the payroll deduction will be printed. |
| Usage | When this field is checked the usage for the payroll deduction will be printed. |
| Cal Code | When this field is checked the calculation code for the payroll deduction will be printed. |
| Date From | When this field is checked the date the deduction is effective from for the payroll deduction will be printed. |
| Date Until | When this field is checked the date the deduction is effective until for the payroll deduction will be printed. |
| Parameters | When this field is checked the parameters for the payroll deduction will be printed. |
| Selections | When this field is checked the selection for the payroll deduction will be printed. |
| Fixed Amount | When this field is checked the fixed amount for the payroll deduction will be printed. |
| Journalize | When this field is checked the journalize for the employee deduction will be printed. |
| Mod. Employee | When this field is checked the modify Employee for the employee deduction will be printed. |
| Benefit on cheque | When this field is checked the employee benefits will printed. |
| Benefit Subject To | When this field is checked the benefit is subject to the information will be printed. |
| Distribute Benefit | When this field is checked the distribution of the benefit will be printed. |
| EFT Deduction | When this field is checked the EFT deduction information will be printed. |
| EFT Benefit | When this field is checked the EFT benefit information will be printed. |

Page Break Selection If the box to the left of yes has a check mark the report will start a new page for each deduction object.

Select Deductions Selection To choose deductions for the Payroll Deduction report select the select deduction object.

For instructions on how to select deduction refer to page 3 of the common payroll selection screen chapter.

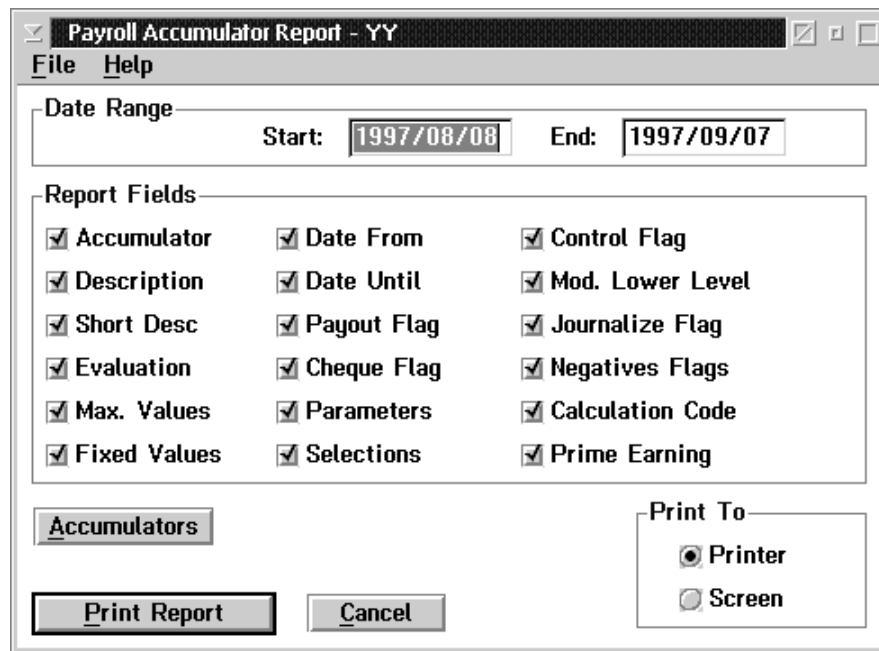
Payroll Accumulator Report

The **Payroll Accumulator Report** option prints a listing of the Accumulator Payrates for each employee, payroll or global depending on the menu choice.

This function allows the user to select the date range for the report, the data fields to be included in the report, when to page break, and to select the accumulator to be included in the report.

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report title at the top of the window when only one employee is selected.

The dialog box for the Payroll Accumulator Report option in the reports menu appears as follows:



Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending date may be entered. If both dates are zero the entire report will print from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

| Field | Description |
|------------------|---|
| Accumulator | When this field is checked the accumulator code for the payroll accumulator will be printed. |
| Description | When this field is checked the description for the payroll accumulator will be printed. |
| Short Desc. | When this field is checked a short description for the payroll accumulator will be printed. |
| Evaluation | When this field is checked the evaluation for the payroll accumulator will be printed. |
| Max. Values | When this field is checked the maximum values for the payroll accumulator will be printed. |
| Fixed Values | When this field is checked the fixed values for the payroll accumulator will be printed. |
| Date From | When this field is checked the date the accumulator is effective from for the payroll accumulator will be printed. |
| Date Until | When this field is checked the date the accumulator is effect until for the payroll accumulator will be printed. |
| Payout Flag | When this field is checked the payout flag for the payroll accumulator will be printed. |
| Cheque Flag | When this field is checked the cheque flag for the payroll accumulator will be printed. |
| Parameters | When this field is checked the parameters for the payroll accumulator will be printed. |
| Selections | When this field is checked the selection flag for the payroll accumulator will be printed. |
| Control Flag | When this field is checked the control flag for the payroll accumulator will be printed. |
| Mod. Lower Level | When this field is checked the message if the accumulator is modifiable at a lower level for payroll accumulator will be printed. |
| Journalize Flag | When this field is checked the Journalize flag for the payroll accumulator will be printed. |
| Negative Flag | When this field is checked the accumulators that allow negatives will be printed. |
| Calculation Code | When this field is checked the calculation code for the payroll accumulator will be printed. |
| Prime Earnings | When this field is checked the prime earnings for the payroll accumulator will be printed. |

Page Break

If the box to the left of yes has a check mark the report will start each accumulator object.

**Select
Accumulator
Selection**

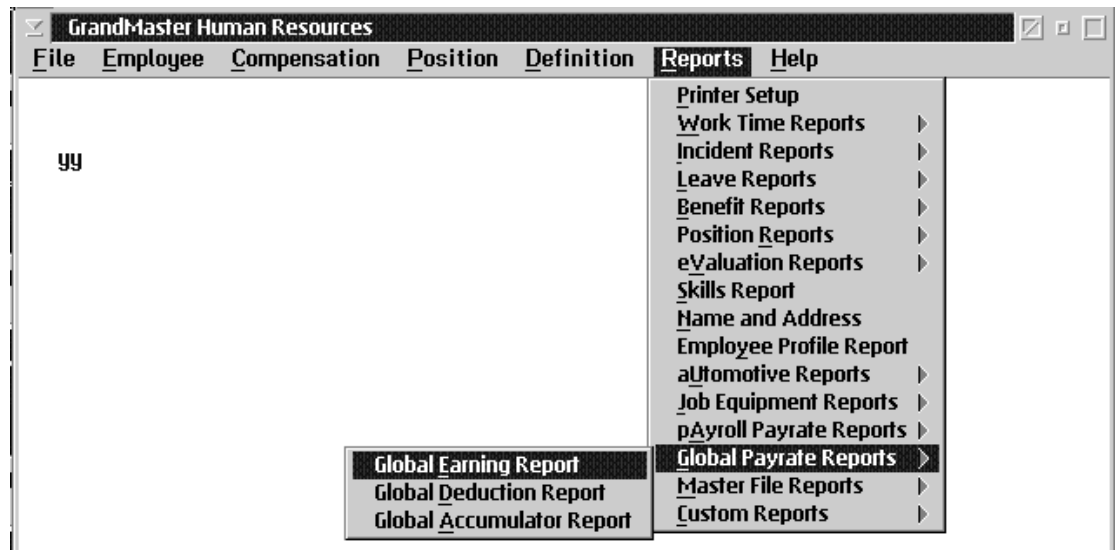
To choose accumulators to the Payroll Accumulator Report Select the Select Accumulator object.

For instructions on how to select accumulators refer to page 2 of the common payroll selection screen chapter.

Global Payrate Reports

The Global Payrate Reports menu from the menu bar is used to print payrate reports from the payroll data.

The Global Payrate Reports menu appears as follows:



Global Payrate Reports

- Global Earning Report
- Global Deduction Report
- Global Accumulator Report

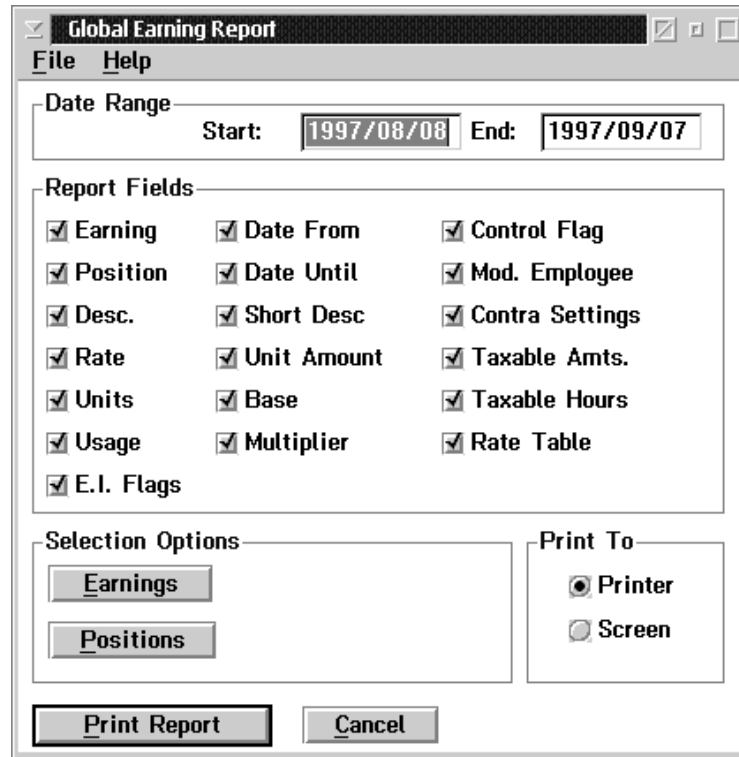
Global Earning Report

The **Global Earning Report** option prints a listing of the Earning Payrates for each employee, payroll or global payroll depending on the menu choice.

This function allows the user to select the date range for the report, the data fields to be included in the report, when to page break, and to select the earning & position to be included in the report.

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report title at the top of the window when only one employee is selected.

The dialog box for the **Global Earning Report** option in the reports menu appears as follows:



Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending date may be entered. If both dates are zero the entire report will print from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

| Field | Description |
|------------------------|--|
| Earning | When this field is checked the earning code for the global earning will be printed. |
| Position | When this field is checked the position for the global earning will be printed. |
| Description | When this field is checked the long description for the global earning will be printed. |
| Rate | When this field is checked the rate for the global earning will be printed. |
| Units | When this field is checked the units for the global earning will be printed. |
| Usage | When this field is checked the usage for the global earning will be printed. |
| Date From | When this field is checked the date the earning is effective from for the global earning will be printed. |
| Date Until | When this field is checked the date the earning is effective until for the global earning will be printed. |
| Short Desc. | When this field is checked the pay statement description for the global earning will be printed. |
| Unit Amount | When this field is checked the earning unit amount for the global earning will be printed. |
| Base | When this field is checked the base earning to calculate multiples on or for the global earning will be printed. |
| Multiplier | When this field is checked the multiplier for the global earning will be printed. |
| Control Flag | When this field is checked the control flag for the global earning will be printed. |
| Mod. Employee | When this field is checked the message if the earning is modifiable at an employee level for global earning will be printed. |
| Contra Settings | When this field is checked the contra settings for the global earning will be printed. |
| Taxable Amounts | When this field is checked the taxable amount for the global earning will be printed. |
| Taxable Hours | When this field is checked the taxable hours for the global earning will be printed. |
| Rate Tables | When this field is checked the rate tables for the global earning will be printed. |

**Page Break
Selection**

If the box to the left of yes has a check mark the report will start each earning object.

**Select Earnings
Selection**

To choose earnings to the Global Earning Report select the select earnings object.

For instructions on how to select earnings refer to page 6 of the common payroll selection screen chapter.

**Select Positions
Selection**

To choose selected positions for the Position Assignment Report select the Select Positions object.

For instructions on how to select positions refer to page 9 of the common payroll selection screen chapter.

If you have selected positions the message Exclude Selections or Include Selections will be displayed beside the selection button when you return to the select report object dialog box.

Global Deduction Report

The **Global Deduction Report** option prints a listing of the Deduction Payrates for each employee, payroll or global payroll depending on the menu choice.

This function allows the user to select the date range for the report, the data fields to be included in the report, when to page break, and to select the deduction to be included in the report.

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report title at the top of the window when only one employee is selected.

The dialog box for the **Global Deduction Report** option in the reports menu appears as follows:

Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending date may be entered. If both dates are zero the entire report will print from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

| Field | Description |
|---------------------------|--|
| Deduction | When this field is checked the deduction for the global deduction will be printed. |
| Description | When this field is checked the description for the global deduction will be printed. |
| Short Desc. | When this field is checked the short description for the global deduction will be printed. |
| Class | When this field is checked the class for the global deduction will be printed. |
| Usage | When this field is checked the usage for the global deduction will be printed. |
| Calculation Code | When this field is checked the calculation code for the global deduction will be printed. |
| Date From | When this field is checked the date the deduction is effective from for the global deduction will be printed. |
| Date Until | When this field is checked the date the deduction is effective until for the global deduction will be printed. |
| Parameters | When this field is checked the parameters for the global deduction will be printed. |
| Selections | When this field is checked the selections for the global deduction will be printed. |
| Fixed Amts | When this field is checked the fixed amounts for the global deduction will be printed. |
| Journalize | When this field is checked the journalize for the global deduction will be printed. |
| Mod. Employee | When this field is checked the modify employee for the global deduction will be printed. |
| Ben. On cheque | When this field is checked those benefits that are printed on a cheque at the global level will be printed. |
| Benefit Subject To | When this field is checked the global benefit is subject to information will be printed. |
| Distribute Benefit | When this field is checked the global distribution of benefits will be printed. |
| Eft Deduction | When this field is checked the Global EFT Deduction information will be printed. |
| EFT Benefit | When this field is checked the global EFT benefit information will be printed. |

Page Break Selection If the box to the left of yes has a check mark the report will start a new page for each deduction object.

Select Deductions Selection To choose deductions for the Global Deduction report select the select deduction object.

For instructions on how to select deduction refer to page 3 of the common payroll selection screen chapter.

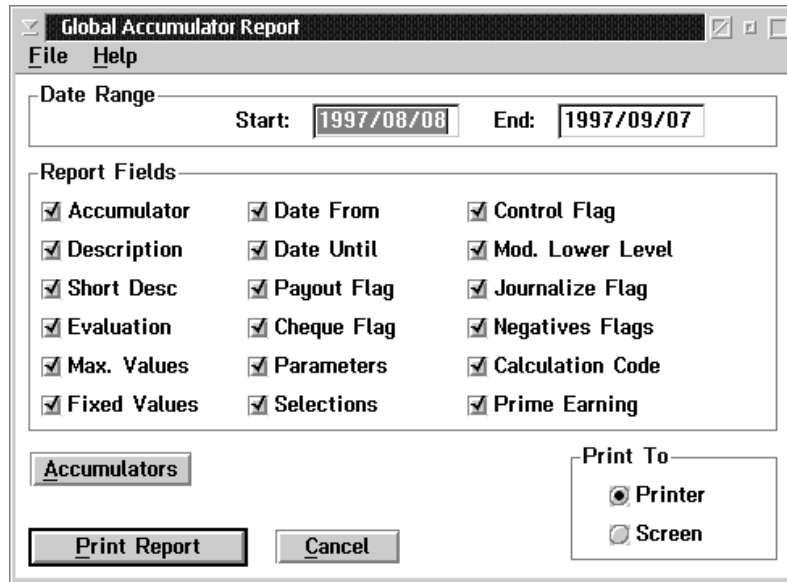
Global Accumulator Report

The **Global Accumulator Report** option prints a listing of the Accumulator Payrates for each employee, payroll or global depending on the menu choice.

This function allows the user to select the date range for the report, the data fields to be included in the report, when to page break, and to select the accumulator to be included in the report.

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report title at the top of the window when only one employee is selected.

The dialog box for the **Global Accumulator Report** option in the reports menu appears as follows:



Saving...

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending date may be entered. If both dates are zero the entire report will print from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

| Field | Description |
|-------------------------|--|
| Accumulator | When this field is checked the accumulator code for the global accumulator will be printed. |
| Description | When this field is checked the description for the global accumulator will be printed. |
| Short Desc. | When this field is checked a short description for the global accumulator will be printed. |
| Evaluation | When this field is checked the evaluation for the global accumulator will be printed. |
| Max. Values | When this field is checked the maximum value for the global accumulator will be printed. |
| Fixed Values | When this field is checked the fixed values for the global accumulator will be printed. |
| Date From | When this field is checked the date the accumulator is effective from for the global accumulator will be printed. |
| Date Until | When this field is checked the date the accumulator is effective until for the global accumulator will be printed. |
| Payout Flag | When this field is checked the payout flag for the global accumulator will be printed. |
| Cheque Flag | When this field is checked the Cheque flag for the global accumulator will be printed. |
| Parameters | When this field is checked the parameters for the global accumulator will be printed. |
| Selection | When this field is checked the selection for the global accumulator will be printed. |
| Control Flag | When this field is checked the control flag for the global accumulator will be printed. |
| Mod. Lower Level | When this field is checked the message if the accumulator is modifiable at a lower level for global accumulator will be printed. |
| Journalize Flag | When this field is checked the journalize flag for the global accumulator will be printed. |
| Negative Flag | When this field is checked the negative flag for the global accumulator will be printed. |
| Calculation Code | When this field is checked the calculation code for the global accumulator will be printed. |
| Prime Earning | When this field is checked the prime earning for the global accumulator will be printed. |

Page Break

If the box to the left of yes has a check mark the report will start each accumulator object.

**Select
Accumulator
Selection**

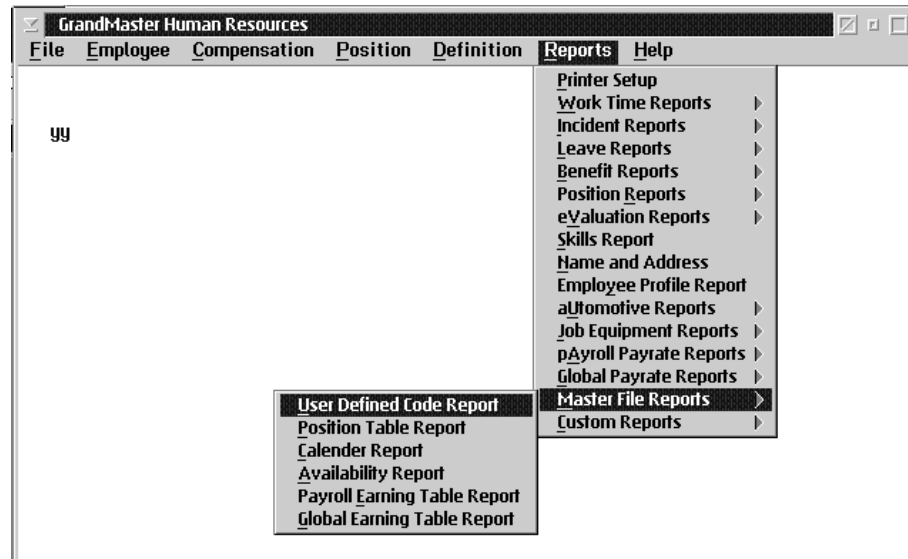
To choose accumulators to the Global Accumulator Report Select the Select Accumulator object.

For instructions on how to select accumulators refer to page 2 of the common payroll selection screen chapter.

Master File Reports

The Master File Report menu from the menu bar is used to print reports from the human resource data.

The Master File Reports menu appears as follows:



Master File Report

- User Defined Code Report
- Position Table Report
- Calendar Report
- Availability Report
- Payroll Earning Table Report
- Global Earning Table Report

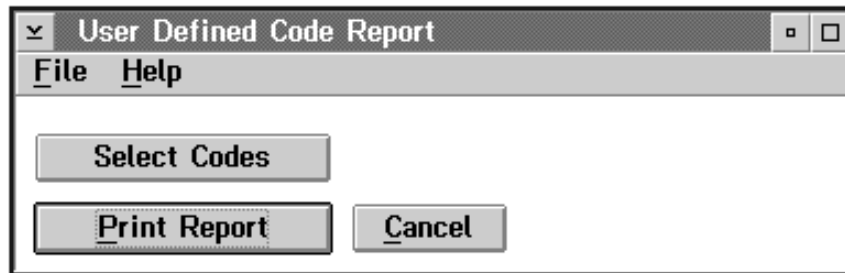
User Defined Code Report

The **User Defined Code Report** prints a listing of the user defined codes information for the code group. This function allows the user to select a desired code group for the report if no group was selected all groups will be printed.

For instructions on how to select group codes refer to page 34 of the common selection screen chapter.

If you have selected groups the message Exclude Selections or Include Selection will be displayed beside the selection button when you return to the place where the select option was required.

The dialog box appears as follows:



Report Fields

| Fields | Description |
|------------------|--|
| Code Name | This field prints the name of the code. |
| Code Description | This field prints the description of the code. |



All groups will print on a separate page. The group name and description will print before all the code names, and if the code has data records enabled that message will print after the description.

Position Table Report

The **Position Table Report** option prints a listing of Position Information.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the object to include or exclude in the report.

If a single position was selected before running this program only that position will be printed. The name of the position will be shown after the report name at the top of the window when a single position has been selected. The **Select Positions** option will not be available when a single position has been selected.

The dialog box for the **Position Table Report** option in the Reports menu appears as follows:

The dialog box titled "Position Table Report" features a menu bar with "File" and "Help". It is divided into three main sections:

- Date Range:** Includes "Start:" and "End:" fields. The "Start:" field contains the date "1996/08/15" and the "End:" field contains "1996/09/14".
- Report Fields:** A list of nine fields, each with a checked checkbox:
 - Position
 - Start Date
 - Description
 - Type
 - End Date
 - Distribution
 - Class
 - Pay Table
 - Hour Allocation
- Sort Order:** Two radio buttons are present: "Position Code" (which is selected) and "Position Description".

At the bottom of the dialog are three buttons: "Select Positions", "Print Report", and "Cancel".

Saving...

The selections made by the user can be saved by selecting the **Save Parameters** in the File menu.

Date Range Selection

To limit the range of the report you may enter the starting and ending date. If both dates are zero the entire report will be printed. If only the ending date is zero the report will be printed from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following nine data fields.

| Field | Description |
|------------------------|---|
| Position | When this field is checked the position will be printed on the report. |
| Description | When this field is checked the description of the position will be printed on the report. |
| Type | When this field is checked the position type code will be printed on the report. |
| Class | When this field is checked the position class code will be printed on the report. |
| Start Date | When this field is checked the starting date of the position will be printed on the report. |
| End Date | When this field is checked the ending date of the position will be printed on the report. |
| Pay Table | When this field is checked the pay table will be printed on the report. |
| Distribution | When this field is checked the distribution will be printed on the report. |
| Hour Allocation | When this field is checked the position hour allocation will be printed on the report. |

Select Positions Selection

To choose selected positions for the Position Assignment Report select the **Select Positions** object.

For instructions on how to select positions refer to page 6 of the common selection screen chapter.

If you have selected positions the message Exclude Selections or Include Selections will be displayed beside the selection button when you return to the select report object dialog box.

Description Field Selection

The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

Sort Order Selection

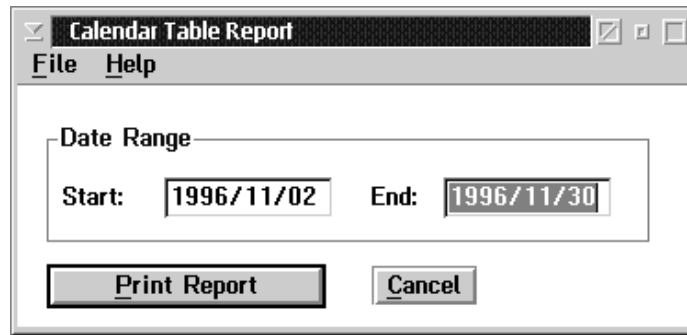
The sort order selection for the report allows for the following sort order selections:

- Position Code - User Defined Code
- Position Description - User Defined Description

Calendar Table Report

The Calendar Table Report prints a listing of calendar holiday information. This function allows the user to select the date range for the report.

The dialog box for the Calendar Table Report option in the Master File Report menu appears as follows:



Date Range Selection

To limit the range of the report the starting and ending date may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Fields

| Field | Description |
|-------------------|--|
| Calendar Date | This field contains the calendar date. |
| Statutory Holiday | This field contains the message statutory if it is a statutory holiday. |
| Calendar Holiday | This field contains the message calendar holiday if it is a calendar holiday. |
| Description | This field contains the user defined description of the calendar holiday when available. |
| Included | This field is a list of user defined codes to be included. |
| Excluded | This field is a list of user defined codes to be excluded. |

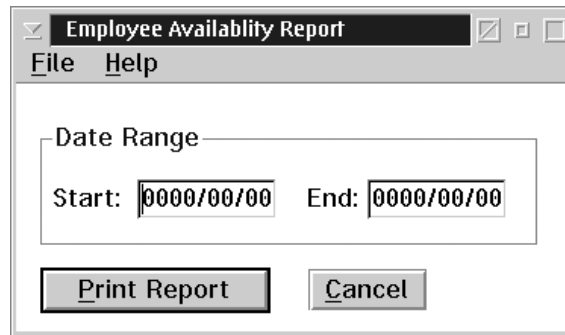


The user defined codes allows up to 100 characters these codes are used in schedule generation to determine if the calendar date is included or excluded.

Availability Report

The Availability Report prints a listing of the available time for each employee. This function allows the user to select the date range for the report.

The dialog box for the Availability Report option in the Master File Report appears as follows:



Date Range Selection

To limit the range of the report the starting and ending date may be entered if both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

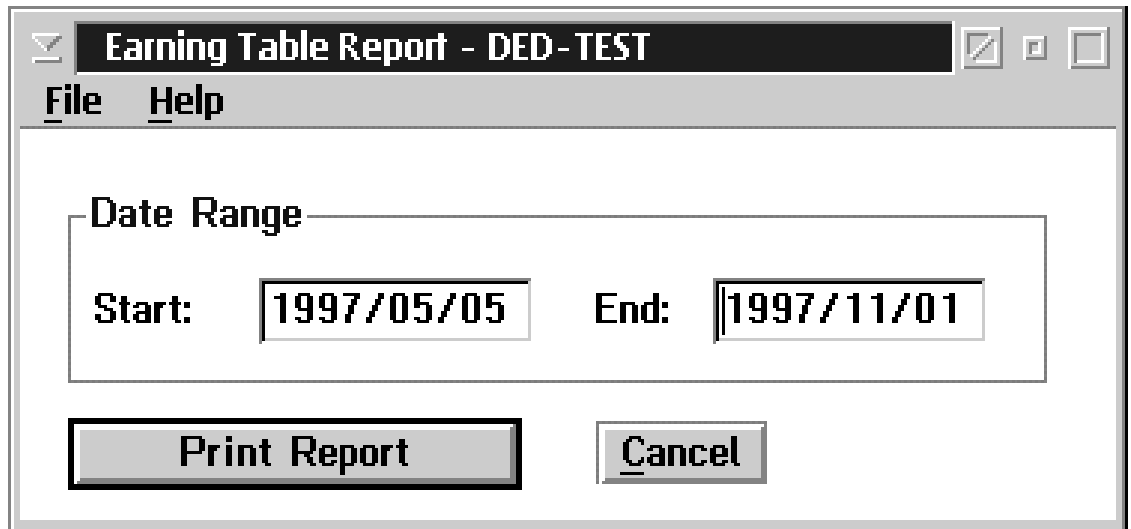
Report Fields

| Field | Description |
|-----------------|--|
| Employee Name | This field is the name of the employee. |
| Start Date | This field is the starting date of this availability information. |
| End Date | This field is the ending date of this availability information. |
| Weeks | The number of weeks in the cycle is entered in this field. |
| Week-1 | This field is used to show the day number of the week when an employee is available to work in week one. |
| Week-2 | This field is used to show the day number of the week when an employee is available to work in week 2. |
| Week-3 | This field is used to show the day number of the week when an employee is available to work in week 3. |
| Week-4 | This field is used to show the day number of the week when an employee is available to work in week 4. |
| Available Hours | This field is used to show the number of hours the employee is available to work in the week. |
| Day of Week | This field is the day of week specified by the day number. |
| Starting Time | This field is the starting time that the employee is available on this day. |
| Ending Time | This field is the ending time that the employee is available on this day. |
| Preferred Days | This field is used to show the day number of the week that an employee prefers to work. |
| Preferred Hours | This field is used to show the number of hours the employee prefers to work in the week. |
| Starting Time | This field is used to show the starting time the employee prefers to work. |
| Ending Time | This field is the ending time the employee prefers to work. |

Payroll Earning Table Report

The Payroll Earning Report prints a listing of the earnings for each employee. This function allows the user to select the date range for the report.

The dialog box for the Payroll Earning Table Report option in the Master File Report appears as follows:



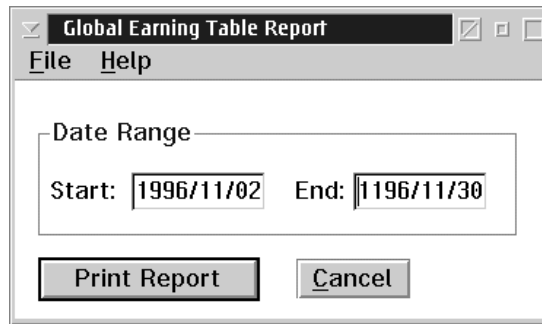
Date Range Selection

To limit the range of the report the starting and ending date may be entered if both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Global Earning Table Report

The Global Earning Table Report prints a listing of the earnings for each employee. This function allows the user to select the date range for the report.

The dialog box for the Global Earning Table Report option in the Master File Report appears as follows:



Date Range Selection

To limit the range of the report the starting and ending date may be entered if both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

This page is intentionally left blank.

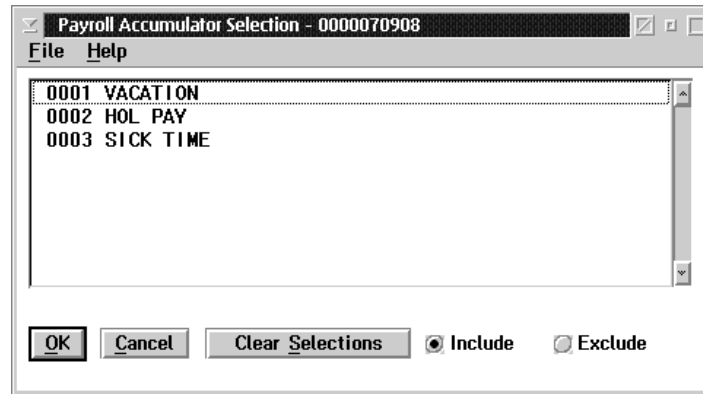
Common Selection Screens

COMMON
SELECTION

Accumulators

The Payroll Accumulator Selection screen allows you to select accumulators from the list of activities displayed.

The dialog box for the Payroll Accumulator Selection appears as follows:



The accumulators are selected by clicking on the desired accumulator with the mouse once, this accumulator will now be highlighted. Any number of accumulators may be selected by repeating this procedure.

When all the desired accumulators are selected click on the OK button.

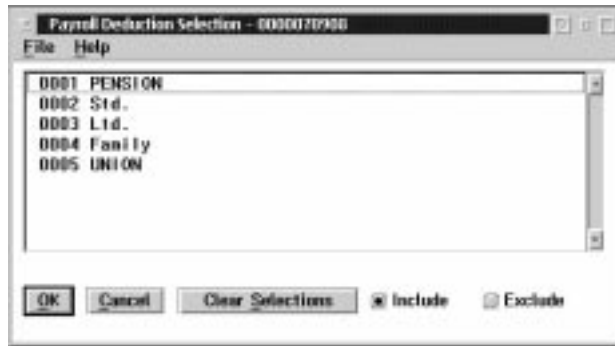
To de-select a single accumulator simply click on the highlighted accumulator and it will no longer be selected. To de-select all the selected accumulators click on the Clear Selection object.

When you are selecting certain accumulator you may include or exclude all the selected accumulators in the report. This is done by clicking on the Include or Exclude object.

Deductions

The Payroll Deduction Selection screen allows you to select deduction from the list of deductions displayed.

The dialog box for the Payroll Deduction Selection appears as follows:



The deductions are selected by clicking on the desired deductions with the mouse once, this deduction will now be highlighted. Any number of deductions may be selected by repeating this procedure.

When all the desired deductions are selected click on the OK button.

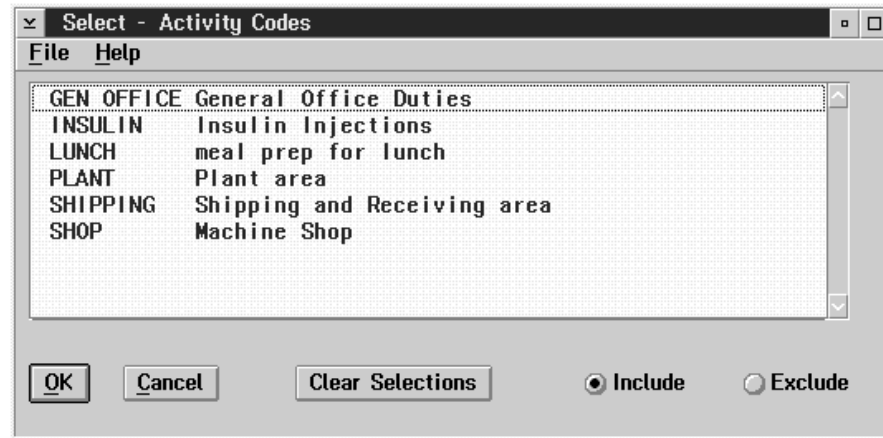
To de-select a single deduction simply click on the highlighted deduction and it will no longer be selected. To de-select all the selected activities click on the Clear Selection object.

When you are selecting certain deductions you may include or exclude all the selected activities in the report. This is done by clicking on the Include or Exclude object.

Select Activity Selection

The Select Activity Selection screen allows you to select activities from the list of activities displayed.

The dialog box for the Activity Selection appears as follows:



The activities are selected by clicking on the desired activities with the mouse once, this activity will now be highlighted. Any number of activities may be selected by repeating this procedure.

When all the desired activities are selected click on the OK button.

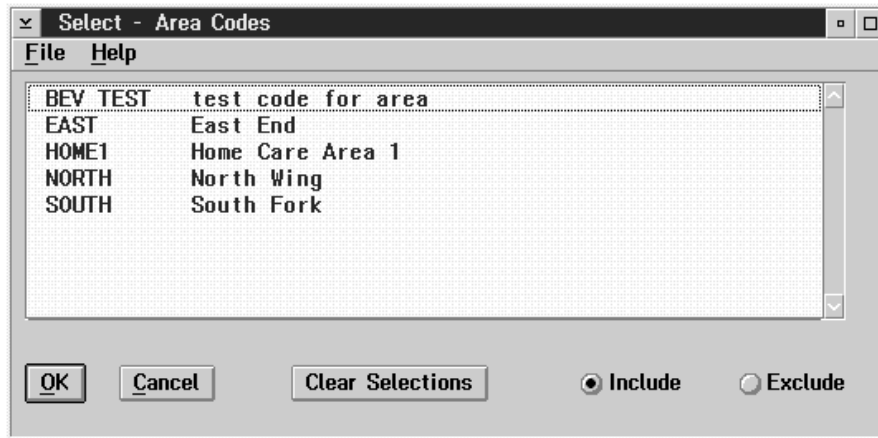
To de-select a single activity simply click on the highlighted activity and it will no longer be selected. To de-select all the selected activities click on the Clear Selection object.

When you are selecting certain activities you may include or exclude all the selected activities in the report. This is done by clicking on the Include or Exclude object.

Select Area Selection

The Select Area Selection screen allows you to select areas from the list of areas displayed.

The dialog box for the Area Selection option appears as follows:



The areas are selected by clicking on the desired area with the mouse once, this area will now be highlighted. Any number of areas may be selected by repeating this procedure.

When all the desired areas are selected click on the OK button.

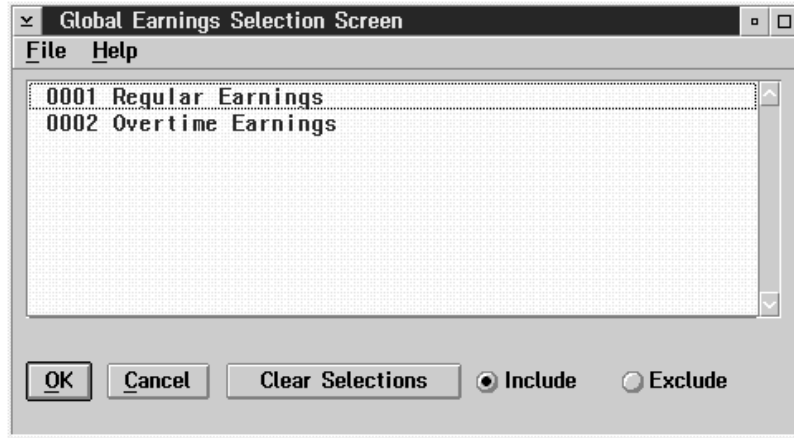
To de-select a single area simply click on the highlighted area and it will no longer be selected. To de-select all the selected areas click on the Clear Selections object.

When you are selecting certain areas you may include or exclude all the selected areas in the report. This is done by clicking on the Include or Exclude object.

Select Earnings Selection

The Select Earnings selection allows you to select earnings from the list of earnings displayed.

The dialog box for the Earnings Selection appears as follows:



The earnings are selected by clicking on the desired earnings with the mouse once, the earning will now be highlighted. Any number of earnings may be selected by repeating this procedure.

When all the desired earnings are selected click on the OK button.

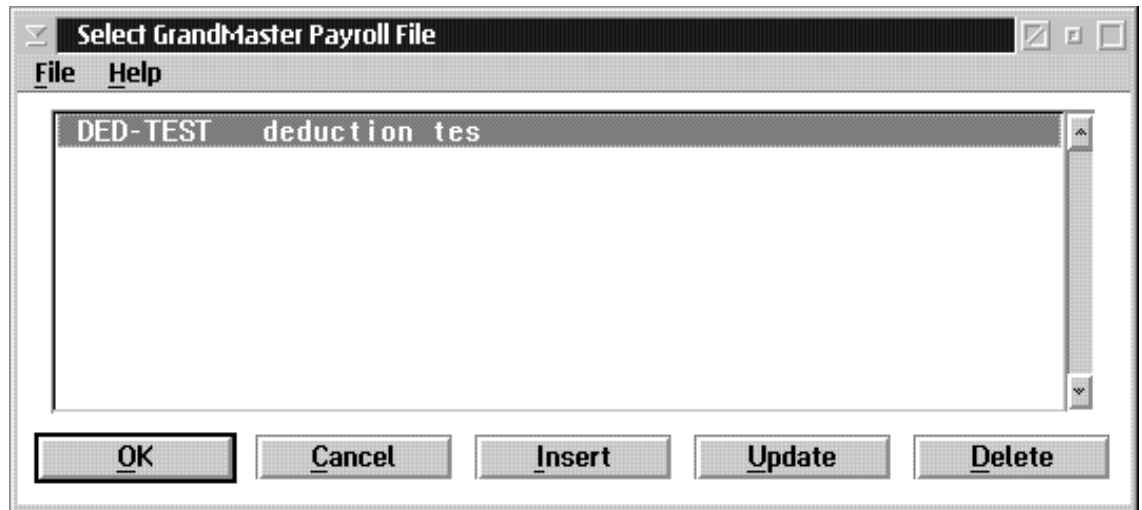
To de-select a single earning simply click on the highlighted earning and it will no longer be selected. To de-select the all selected earnings click on the Clear Selection object.

When you are selecting certain earnings you may include or exclude all the selected earnings in the report. This is done by clicking on the Include or Exclude object.

Select Grand Master Payroll File

One of these payrolls must be selected for scheduling. The payroll is selected by placing the cursor over the payroll and clicking on the left-hand mouse button. The payroll selected will appear in the main menu screen.

The following dialog box appears:



Inserting a New Payroll

The INSERT button will allow the user to add a new payroll to the list of available payrolls. To insert a new payroll the following steps should be taken:

1. Select the INSERT button.
2. Type in the name of the new payroll in the dialog box that appears and select the OK button.
3. In the new dialog box type in the name, description, and path to payroll in the proper fields.
4. In the payroll password if you click on the enable password the set password button will be available.
5. Select the **Save** option from the **File** menu and then select the OK button.
6. Your new payroll will now be displayed on the screen.

Updating an Existing Payroll

If the UPDATE button is selected the user will be able to update the name, description, and/or path to the payroll. To update the payroll follow these steps:

1. Select the UPDATE button.
2. A dialog box will appear which displays the name, description, and path to payroll. Make changes to the necessary fields.
3. Select the Save option from the File menu and then select the OK button.
4. In the payroll password if you click on the enable password the set password button will be available.

Deleting an Existing Payroll

If the DELETE button is selected the user will be able to delete the payroll.

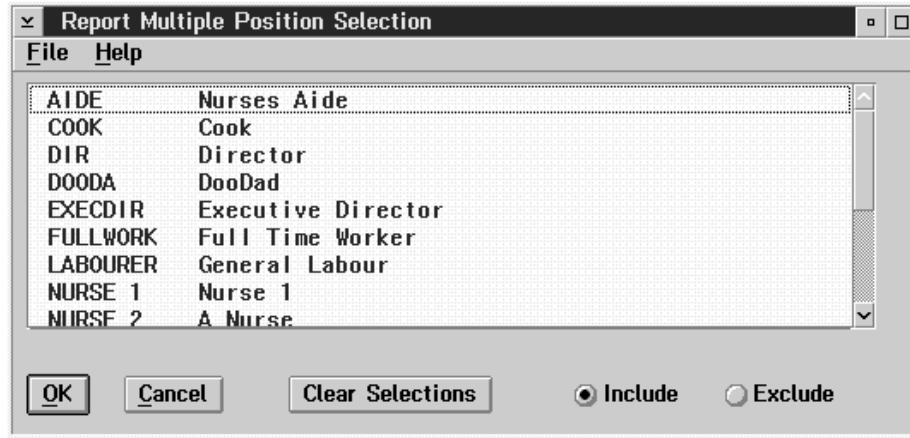
To delete the payroll follow these steps:

1. Select the DELETE button.
2. You are asked to confirm the delete. Click on yes to delete the payroll.

Select Positions Selection

The Select Positions Selection screen allows you to select positions from the list of positions displayed.

The dialog box for the Position Selection appears as follows:



The positions are selected by clicking on the desired position with the mouse once, this position will now be highlighted. Any number of positions may be selected by repeating this procedure.

When all the desired positions are selected click on the OK button.

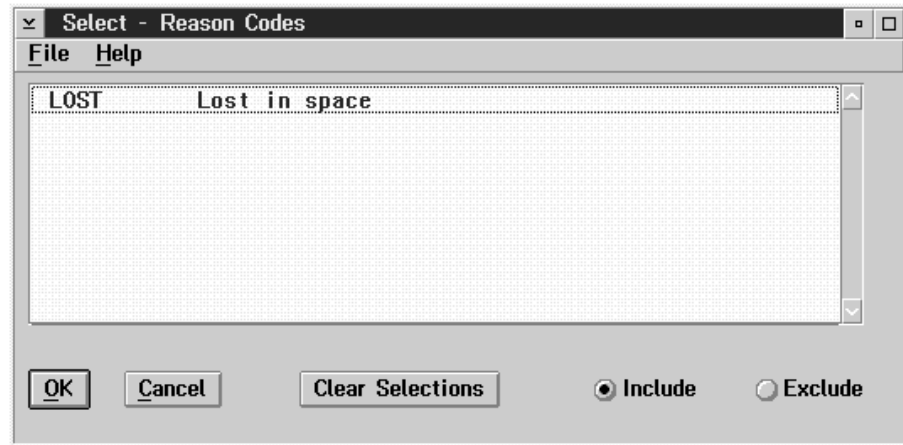
To de-select a single position simply click on the highlighted position and it will no longer be selected. To de-select all the selected positions click on the Clear Selections object.

When you are selecting certain positions you may include or exclude all the selected positions in the report. This is done by clicking on the Include or Exclude object.

Select Reasons Selection

The Select Reasons Selection screen allows you to select reasons from the list of reasons displayed.

The dialog box for the reason selection appears as follows:



The reasons are selected by clicking on the desired reason with the mouse once, the reasons will now be highlighted. Any number of reasons may be selected by repeating this procedure.

When all the desired reasons are selected click on the OK button.

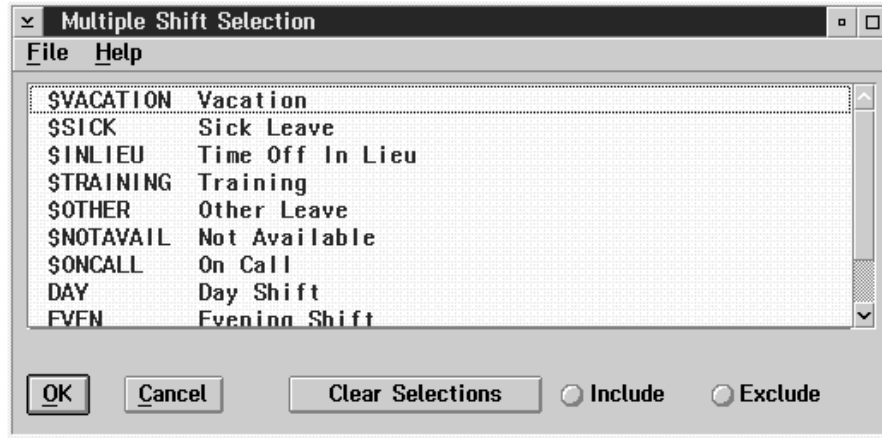
To de-select a single reason simply click on the highlighted reason and it will no longer be selected. To de-select all the selected reasons click on the Clear Selection object.

When you are selecting certain reasons you may include or exclude all the selected reasons in the report. This is done by clicking on the Include or Exclude object.

Select Shifts Selection

The Select Shifts Selection screen allows you to select shifts from the list of shifts displayed.

The dialog box for the Shift Selection appears as follows:



The shifts are selected by clicking on the desired shifts with the mouse once, the shift will now be highlighted. Any number of shifts may be selected by repeating this procedure.

When all the desired shifts are selected click on the OK button.

To de-select a single shift simply click on the highlighted shift and it will no longer be selected. To de-select the all selected shifts click on the Clear Selections object.

When you are selecting certain shifts you may include or exclude all the selected shifts in the report. This is done by clicking on the Include or Exclude object.

Select Single Client Selection

The Select Single Client Selection screen allows you to choose to select only one client from the list of clients displayed.

The dialog box for the client selection appears as follows:



Next Client Pressing the next button or selecting the next client option from the File menu will bring up the next client in the list.

Previous Client Pressing the previous client button or selecting the previous client option from the File Menu will go back to the previous client in the list.

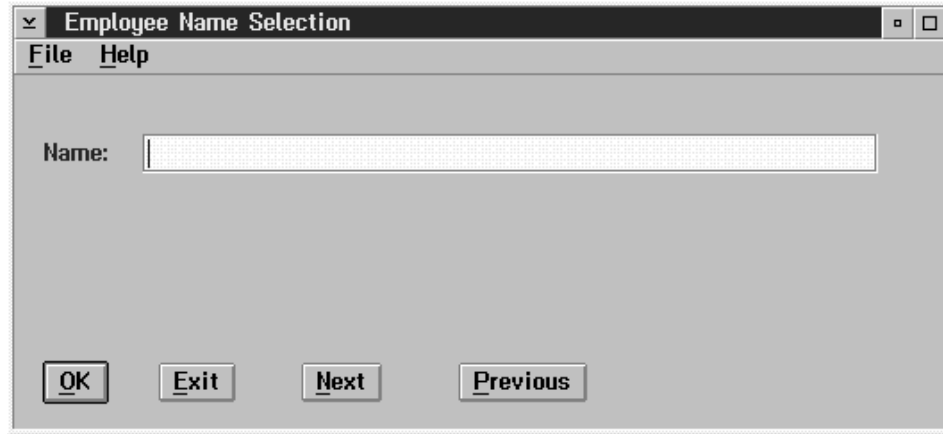
F8 (List) Pressing the F8 key or selecting the list client option from the file menu will bring up a list of clients.

ESC (Exit) The ESC key will exit the user from the current screen.

Select Single Employee Selection

The Select Single Employee Selection screen allows you to select only one employee from the list of employees displayed.

The dialog box for the employee selection appears as follows:



Next Employee Pressing the Next button or selecting the next employee option from the File menu will bring up the next employee in the list.

Previous Employee Pressing the Previous button or selecting the previous employee option from the File Menu will go back to the previous employee in the list.

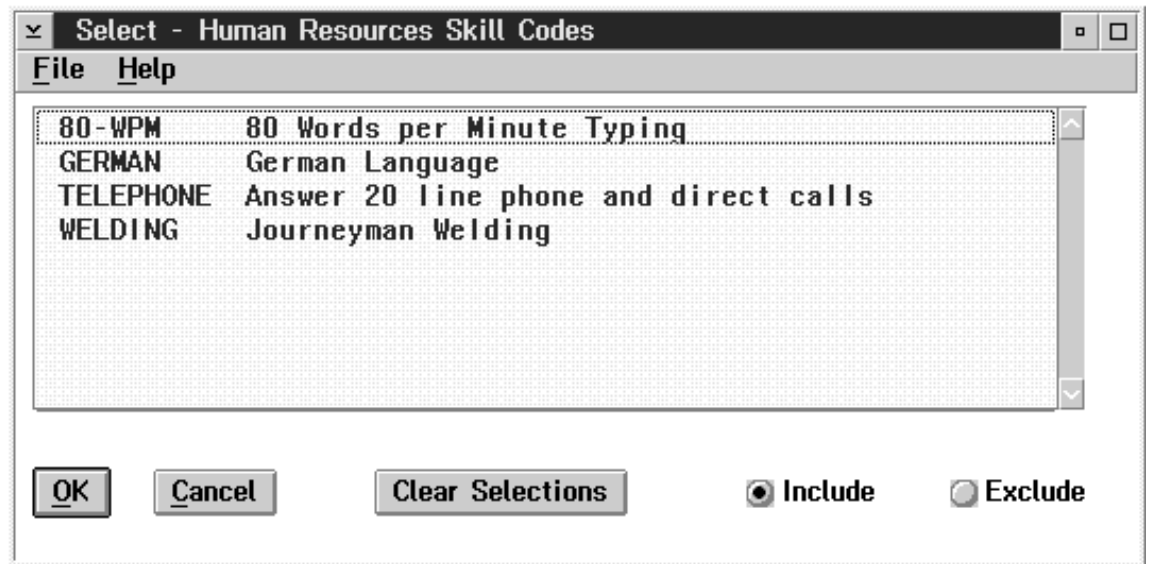
F8 (List) Pressing the F8 key or selecting the list employee option from the file menu will bring up a list of employees. The list will vary depending on whether or not a payroll has been selected. If no payroll is selected all employees will appear in the list. However if a payroll is selected only the employee in that payroll will appear in the list.

ESC (Exit) The ESC key will exit the user from the current screen.
The search technique that is set will change the order that the employees appear in the list.

Select Skill Selection

The Select Skills Selection screen allows you to select skills from the list of skills displayed.

The dialog box skill selection appears as follows:



The skills are selected by clicking on the desired skill with the mouse once, this skill will now be highlighted. Any number of skills may be selected by repeating this procedure.

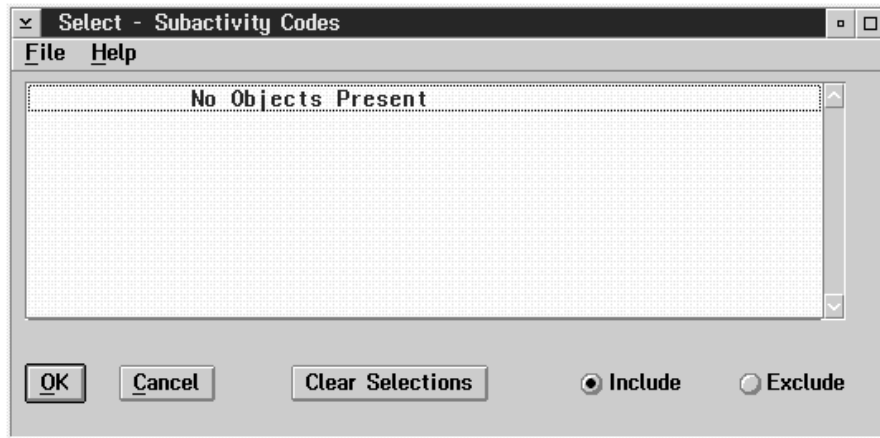
To de-select a single skill simply click on the highlighted skill and it will no longer be selected. To de-select all the selected skills click on the Clear Selections button.

When you are selecting certain skills you may include or exclude all the selected skills in the report. This is done by clicking on the Include or Exclude objects.

Select Subactivity Selection

The Select Subactivity Selection screen allows you to select subactivities from the list of sub activities displayed.

The dialog for the Subactivity selection appears as follows:



The subactivities are selected by clicking on the desired subactivity with the mouse once, this subactivity will now be highlighted. Any number of subactivities may be selected by repeating this procedure.

When all the desired subactivities are selected click on the OK button.

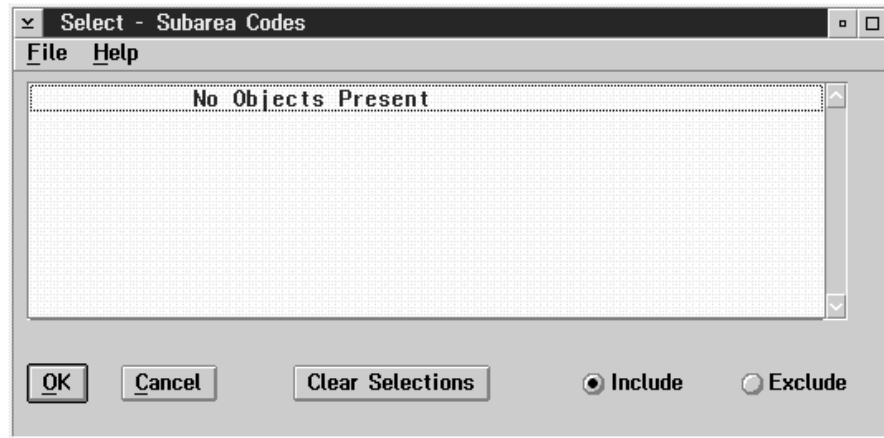
To de-select a single subactivity simply click on the highlighted subactivity and it will now longer be selected. To de-select all the selected subactivites click on the Clear Selections object.

When you are selecting certain subactivities you may include or exclude all the selected sub activities in the report. This is done by clicking on the Include or Exclude object.

Select Subarea Selection

The Select Subarea Selection allows you to select sub areas from the list of sub areas displayed.

The dialog box for the Subarea selection appear as follows:



The subareas are selected by clicking on the desired subareas with the mouse once, this subarea will now be highlighted. Any number of subareas may be selected by repeating this procedure.

To de-select a single subarea simply click on the highlighted subarea and it will no longer be selected. To de-select all the selected subareas click on the Clear Selections object.

When you are selecting certain subareas you may include or exclude all the selected subareas in the report. This is done by clicking on the Include or Exclude object.

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