



How to Use GrandMaster Suite

Working with the Add Employee Wizard



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How to Use GrandMaster Suite - Add Employee Wizard

Overview

The Add Employee Wizard is designed to control the data entry fields that you are provided with during the process of adding an employee to a payroll. By specifying only required data entry fields, you help your data entry personnel to operate in a controlled manner. This method can help simplify and speed up the process of adding employees to the payroll.

The wizard will guide you through the process displaying only the fields that are relevant to your new employee. For example, if you utilize the EFT feature for all of your employees, you can use the wizard to activate the EFT options so that they are available each time you add an employee.

ADD EMPLOYEE WIZARD

The Add Employee Wizard can speed up the process of adding an employee to your payroll by constraining the number of available data entry fields.

For example, if your employee does not require detailed *Bank Information*, you can specify exactly which options are editable.



Banking Information

Account Number:

Branch Number:

Bank Address:

Phone:

Contact Person:

Required Employee Information

<p><u>General Information</u></p> <p><input checked="" type="checkbox"/> Employee Name</p> <p><input type="checkbox"/> Employee Number</p> <p><input checked="" type="checkbox"/> Address</p> <p><input type="checkbox"/> City</p> <p><input type="checkbox"/> Province</p> <p><input type="checkbox"/> Phone</p> <p><u>Date Settings</u></p> <p><input type="checkbox"/> Initial Hiring Date</p> <p><input checked="" type="checkbox"/> Start Date</p> <p><input type="checkbox"/> Last Day Worked</p> <p><input type="checkbox"/> Return Date</p> <p><u>Banking Information</u></p> <p><input checked="" type="checkbox"/> Account Number</p> <p><input checked="" type="checkbox"/> Branch Number</p> <p><input type="checkbox"/> BankAddress</p> <p><input type="checkbox"/> Phone</p> <p><input type="checkbox"/> Contact Person</p>	<p><u>Federal Tax Settings</u></p> <p><input type="checkbox"/> Province</p> <p><input type="checkbox"/> Calculation</p> <p><input type="checkbox"/> Override</p> <p><input checked="" type="checkbox"/> Net Claim</p> <p><input checked="" type="checkbox"/> Additional Tax</p> <p><input type="checkbox"/> Remote Allowance</p> <p><u>Statutory Deductions</u></p> <p><input type="checkbox"/> Exempt CPP</p> <p><input type="checkbox"/> Override Amount</p> <p><input checked="" type="checkbox"/> Exempt E.I.</p> <p><u>Provincial Information</u></p> <p><input checked="" type="checkbox"/> WCB Province</p> <p><input type="checkbox"/> WCB Rate Code</p> <p><input type="checkbox"/> Health Province</p> <p><input type="checkbox"/> Health Rate Code</p> <p><input type="checkbox"/> Health Type</p>
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The *Add Employee Wizard* guides you step by step through the process by enabling only the data entry fields that you specify. This makes the data entry process simple and convenient.

By disabling the features that are not required in a given payroll the process of adding an employee is made faster and more efficient.

When should I use the Add Employee Wizard?

- When you want to provide your data entry personnel a controlled and simplified method of adding employees to the payroll.

- When you want to limit the options that your data entry personnel need to provide when adding an employee to the payroll.
- When you want to provide payroll personnel an accurate and consistent method of adding employees to the payroll. This will help to ensure that employees are always added with the correct information.
- When you need to provide data entry personnel the flexibility of going back to correct possible errors during the data entry process.

How does it work in GrandMaster Suite?

The Add Employee Wizard is designed to display only the options that you specify as being necessary for your particular payroll. Before you use the wizard, you must specify the various data entry options in the *Add Employee Wizard Settings* dialog box.

Once the settings are complete you will need to enable the Wizard for use with your payroll. This can be done on a global level (i.e. for all payrolls) or on a single payroll basis. You can enable the wizard for use via the *Properties - Settings* command under the *Payroll Module's File* menu.

Working at the Payroll Level

You can use the Add Employee Wizard at the Payroll level or at the Employee level. That is, when you begin working with the wizard to define your data entry fields, you may do so from within the *Payroll Module* or the *Employee Module*.

Later on, once the settings are in effect, you can invoke the wizard from either level.

Defining Wizard Settings at the Payroll Level

Before you can use the Add Employee Wizard, you must specify the settings that will be used when the wizard is in effect. These settings can be defined from within the *Payroll Module* (or any other main program module).

TO DEFINE THE WIZARD SETTINGS FROM THE PAYROLL LEVEL

1. With a payroll selected, choose the *Wizard Settings* command from the *Payroll Module's Employee* menu.



Fig. 1
The Wizard Settings Command

This opens the *Add Employee Wizard Settings* dialog box that allows you to specify the fields and options that will be available to you when using the *Add Employee Wizard*.

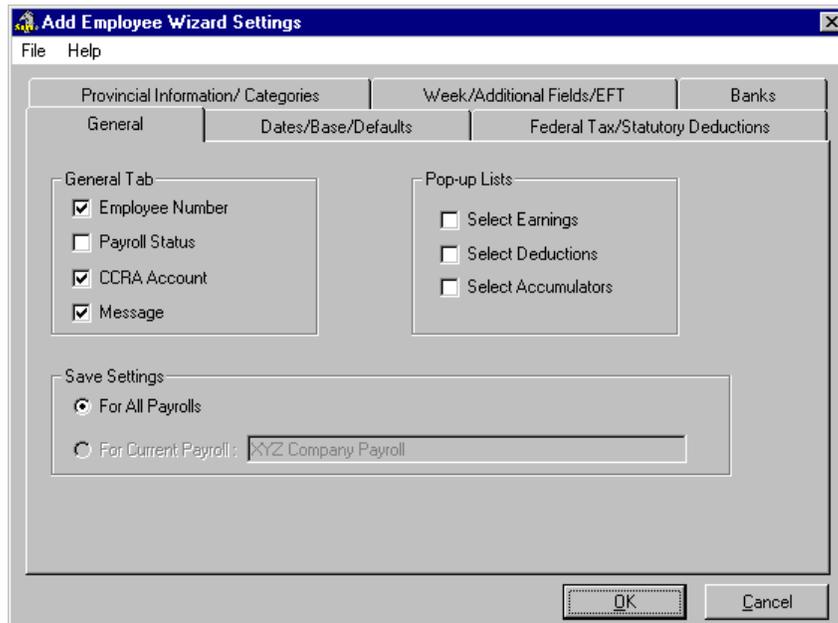


Fig. 2
The Add Employee Wizard Settings Dialog Box

The *General Tab* section allows you to specify the fields that will be available when you view the *Payroll Specific Information* dialog box's *General* tab. This includes information for their Employee Number, their status in the payroll, their CCRA Account Number and a message that may appear on their pay statement.

The *Pop-up Lists* section allows you to specify if you want additional dialog boxes to appear for the employee's Earnings, Deductions and Accumulators during the add employee process. For example, if you want to verify the employee's default earnings while you add them to the payroll, place a check in the Select Earnings box. When you reach the end of the add employee process, the *Employee Earnings* dialog box will appear so you can view or edit the earnings for the new employee.

If you disable the *Pop-up List* features (i.e. remove the check from the boxes) you will need to access the individual employee's information after they are added if you want to make any changes to the employee (e.g. add rates, verify earnings, etc.).

The *Save Settings* options allow you to specify if the Wizard settings are to be global (available for all payrolls) or if the settings are to be specific only to the current payroll.

- In the above example, the *General* tab will display every option for editing except the *Payroll status* option (the only one without a check). The *Pop-up Lists* will not appear since none of these options are checked.
2. Activate the options in this tab as desired for your payroll, then choose the *Dates/Base/Defaults* tab to continue working with the wizard settings.

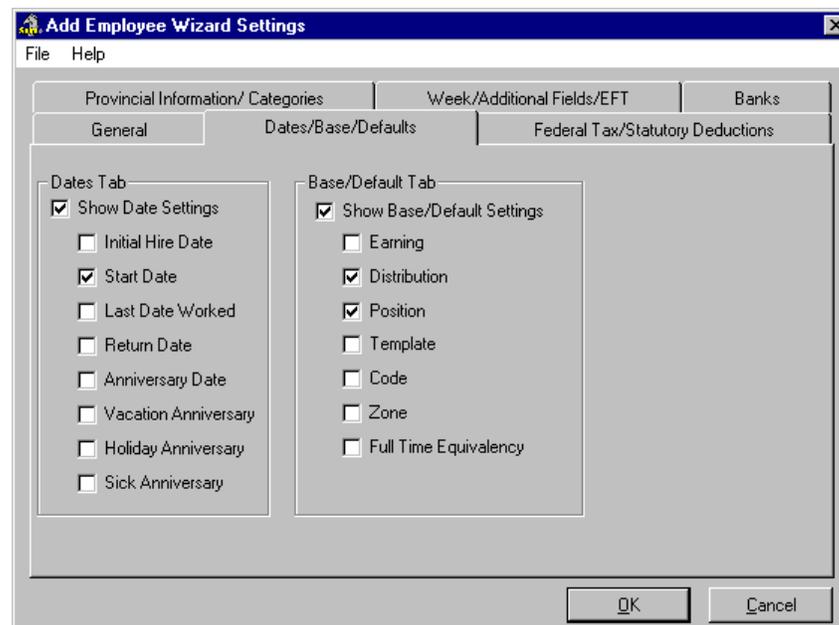


Fig. 3
The *Dates/Base/Default Tab*

The *Dates Tab* section allows you to specify the fields that will be available when you view the *Payroll Specific Information* dialog box's *Dates* tab. This includes information for their initial hiring date, work start date as well as other important anniversary dates.

The *Base/Default Tab* section allows you to specify the fields that will be available when you view the *Payroll Specific Information* dialog box's *Base/Default* tab. This includes information for the employee's base earning.

- In the above example, the *Dates* tab will display only the *Start Date* field for editing. The *Base/Default* tab will have the *Distribution* and *Position* options available for editing because these two are the only options that are checked.
3. Activate the options as desired for your payroll, then choose the *Federal Tax/Statutory Deductions* tab to continue working with the wizard settings.

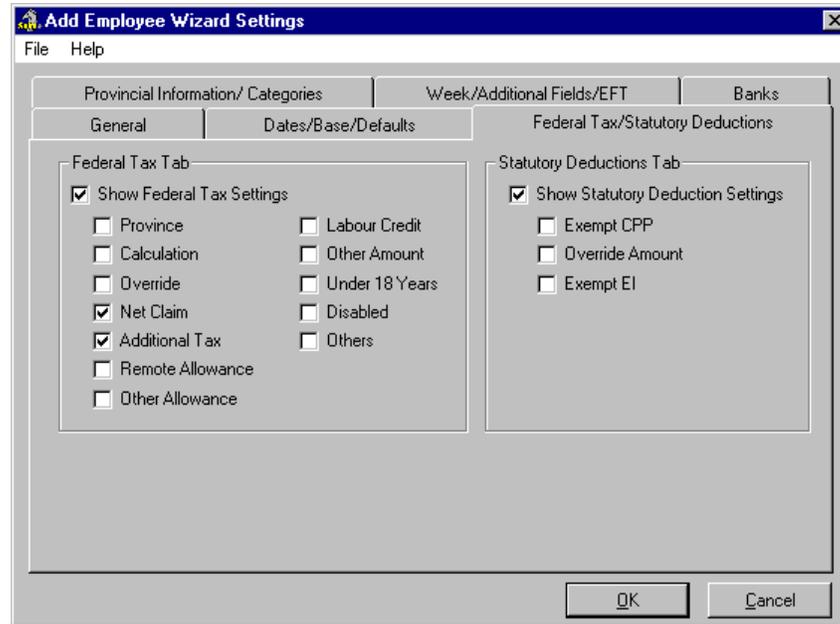


Fig. 4
The Federal Tax/Statutory Deductions Tab

The *Federal Tax Tab* section allows you to specify the fields that will be available when you view the *Payroll Specific Information* dialog box's *Federal Tax* tab. This includes information for their Net Claim amount and tax province (where applicable). Additional allowances and Dependent tax information can also be defined here.

The *Statutory Deductions Tab* section allows you to specify the fields that will be available when you view the *Payroll Specific Information* dialog box's *Statutory Deductions* tab. This includes information for specifying if the employee is exempt from CPP or EI.

- In the above example, the *Federal Tax* tab will display only the *Net Claim* and *Additional Tax* fields for editing. The *Statutory Deductions* tab will appear during the add employee process but no options will be available for editing because none are checked.
4. Activate the options as desired for your payroll, then choose the *Provincial Information/Categories* tab to continue working with the wizard settings.

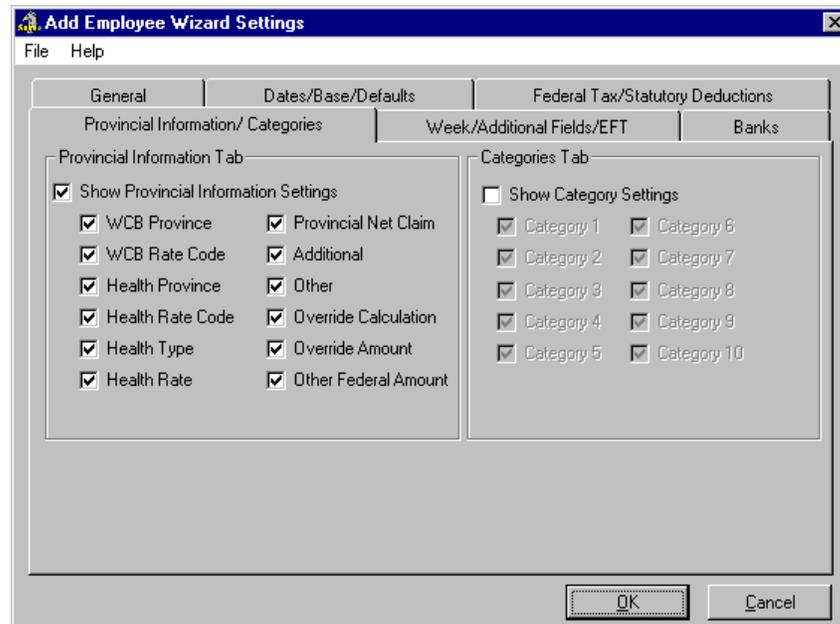


Fig. 5
The Week/Additional Fields/EFT Tab

The *Provincial Information Tab* section allows you to specify the fields that will be available when you view the *Payroll Specific Information* dialog box's *Provincial Information* tab. This includes information for their WCB Province, Health Province, and Provincial Net Claim amount (where applicable). You can also specify additional override information here.

The *Categories Tab* section allows you to specify the fields that will be available when you view the *Payroll Specific Information* dialog box's *Categories* tab. This includes information for specifying a particular code on which to sort employees of for selecting similar types of employees for payroll reporting.

- In the above example, the *Provincial Information* tab will display every available editing field while you are adding the employee. The *Categories* tab will not appear at all during the process because all of the options are disabled.
5. Activate the options as desired for your payroll, then choose the *Week/Additional Fields/EFT* tab to continue working with the wizard settings.

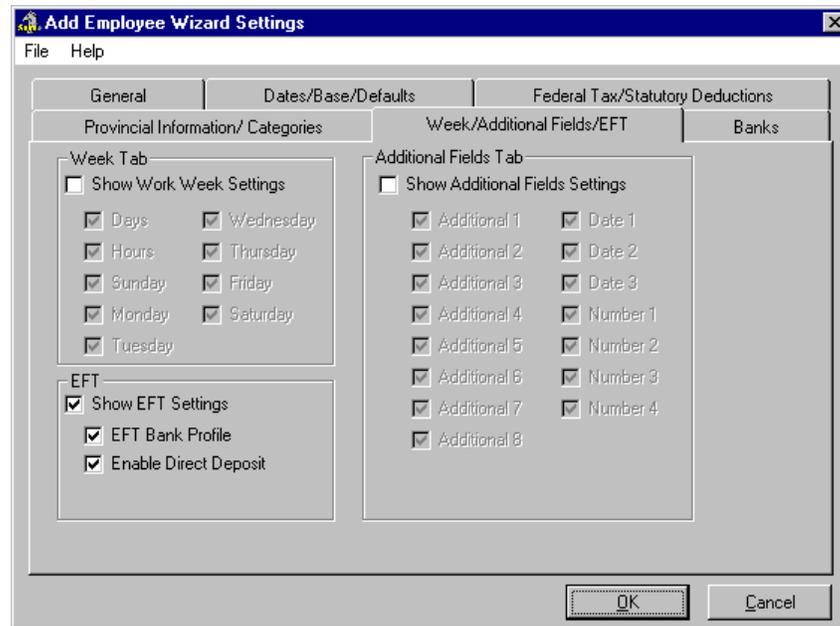


Fig. 6
The *Week/Additional Fields/EFT* Tab

The *Week Tab* section allows you to specify the fields that will be available when you view the *Payroll Specific Information* dialog box's *Week* tab. This includes the standard workweek information that the program requires in order to process payrolls.

The *EFT Tab* section allows you to specify the fields that will be available when you view the *Payroll Specific Information* dialog box's *EFT* tab. This includes information for specifying the Bank Profile that will be used when processing the EFT and for specifying whether a pay cheque will be printed.

The *Additional Fields Tab* section allows you to specify the fields that will be available when you view the *Payroll Specific Information* dialog box's *Additional Fields* tab. These fields are generally used if you have converted from GrandMaster II payroll product. They can also be used to enter other date information, such as group insurance issuance dates, initial pension contribution dates, etc.

- In the above example, the *Week* and *Additional Fields* tabs will not appear. The *EFT* tab will display every available editing field since all of the options are enabled.
6. Activate the options as desired for your payroll, then choose the *Week/Additional Fields/EFT* tab to continue working with the wizard settings.

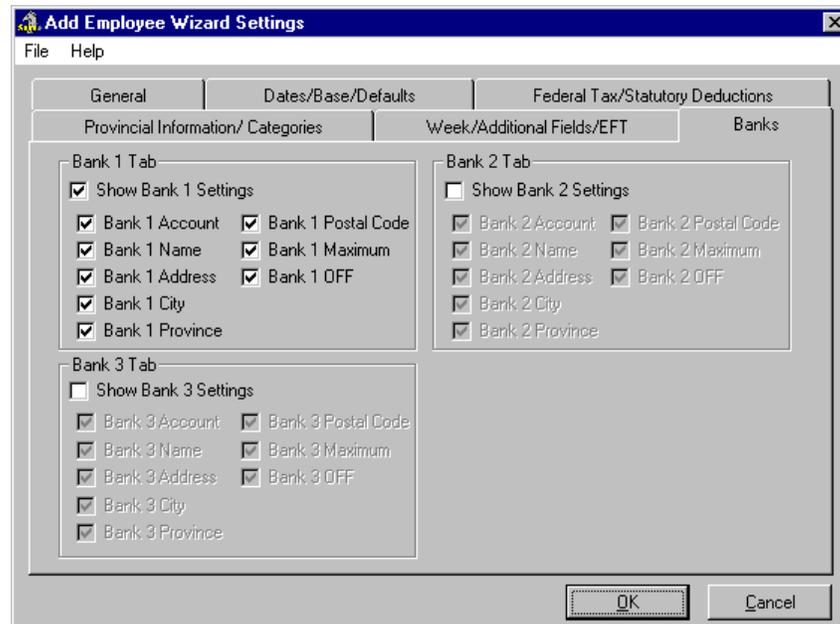


Fig. 7
The *Week/Additional Fields/EFT* Tab

The *Bank 1, 2 and 3 Tab* sections allows you to specify the fields that will be available when you view the various *Bank* tabs in the *Payroll Specific Information* dialog box. These tabs are commonly used to enter the employee's banking information that relates to the EFT feature.

- In the above example, only the *Bank 1* tabs will appear for editing. The other two bank tabs will not be displayed since all of the options are disabled.
7. Activate the remaining options as desired for your payroll, then click *OK* to close the dialog box. This completes the wizard settings. The next step involves enabling the wizard for use with your payroll.

Enabling the Add Employee Wizard

Once you have defined the settings that will be used when you invoke the wizard, you must enable it for use with either the current payroll or all payrolls from this point further. This can only be done through an option in the *Payroll Module* (or any other main program module, e.g. Schedule, Human Resource).

TO ENABLE THE ADD EMPLOYEE WIZARD

1. Open the *Payroll Module* (or any main program module) and choose the *Properties - Settings* command from the **File** menu.



Fig. 8
The Properties - Settings Command

This opens the *Settings* dialog box that allows you to modify a variety of payroll-related options.

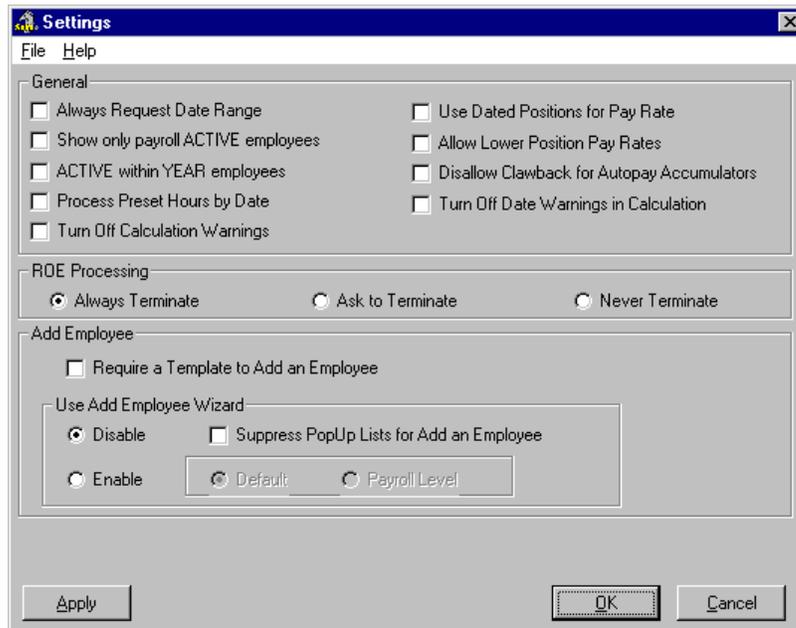


Fig. 9
The Settings Dialog Box

The *Use Add Employee Wizard* section of the dialog box contains the options that control the use of the wizard. When you first install the program, the wizard is disabled and will not appear when you add a new employee to your payroll.

2. Select the *Enable* radio button. This activates the wizard for use and enables the *Default* radio button beside this option. The *Default* option means that the wizard will use the same settings for all payrolls.
3. If you want to use different wizard settings for each different payroll, choose the *Payroll Level* radio button. This will enable the program to use the payroll-specific wizard settings.

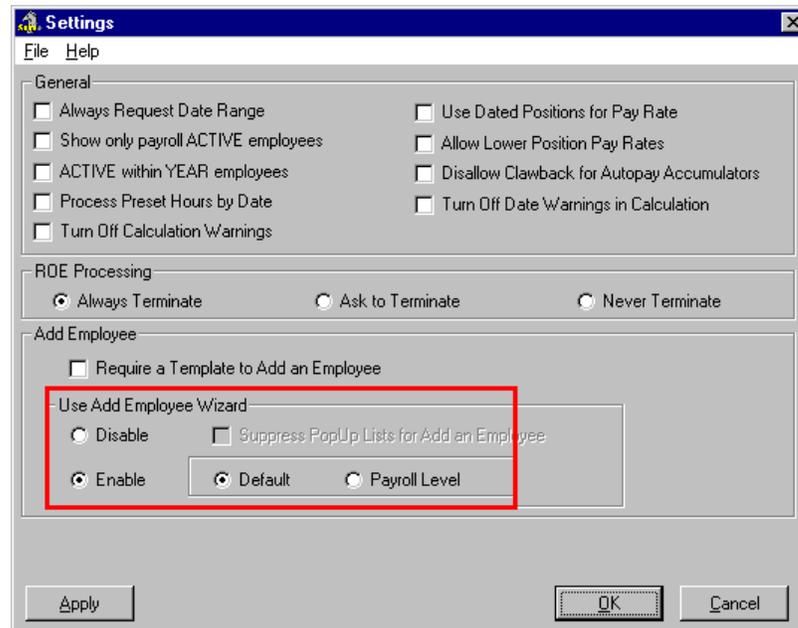


Fig. 10
The Wizard is Enabled

4. If you want to apply these settings for *the current payroll session only*, choose the *Apply* button at the bottom of the dialog box. This will close the dialog box and keep your settings in force only until you close the program.
5. If you want to apply these settings from this point onward, choose the *OK* button. This will close the dialog box and save your settings for *all future payroll sessions*. You are now ready to use the Add Employee wizard.

Working at the Employee Level

As mentioned earlier, you can use the Add Employee Wizard at the Payroll level or at the Employee level. If you have specified that your wizard settings should be in effect for all payrolls (by choosing the *Default* option in the *Settings* dialog box -- see the preceding section), then any wizard settings you change via the *Employee Module* will automatically apply to all payrolls.

Conversely, if you have specified that your wizard settings should be on a payroll-by-payroll basis, then any wizard settings you change via the *Employee Module* will only apply to the current payroll.

Defining Wizard Settings at the Employee Level

Wizard settings do not apply to any given employee, but rather to a single payroll or all payrolls. However, the program allows you to modify wizard settings via the *Employee Module* for convenience.

The next section will briefly discuss how to modify wizard settings from within the *Employee Module*. This function is very similar to the method discussed in the *Defining Wizard Settings at the Payroll Level* section of this guide. Thus, the following section will only touch on the subtle differences.

TO DEFINE THE WIZARD SETTINGS AT THE EMPLOYEE LEVEL

1. From the *Employee Module*, choose the **File - Settings - Wizard Settings** command.



Fig. 11
The Settings - Wizard Settings Command

This opens the *Add Employee Wizard Settings* dialog box that allows you to specify the fields and options that will be available to you when using the *Add Employee Wizard*.

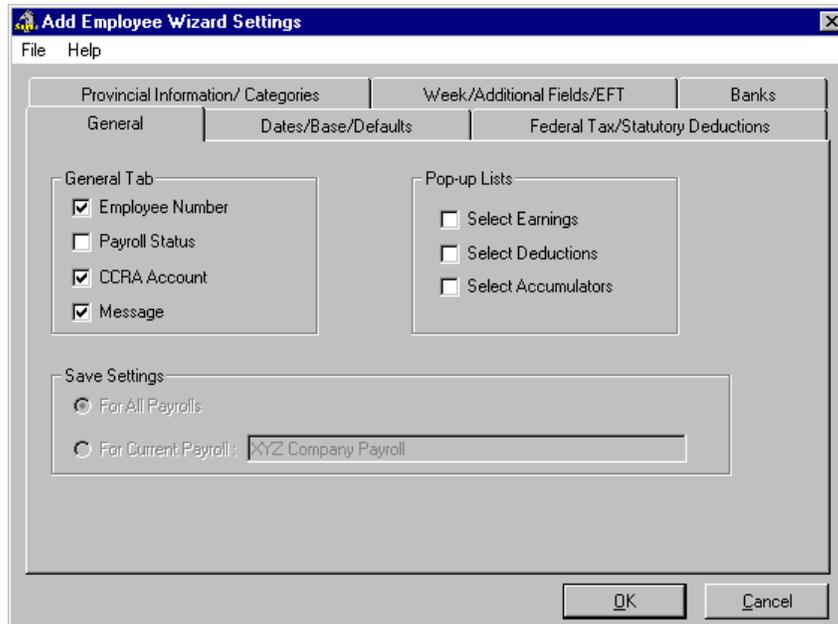


Fig. 12
The Add Employee Wizard Settings Dialog Box

2. Modify the wizard settings as required. For more detailed instructions on this task, refer to the *Defining Wizard Settings at the Payroll Level* section of this guide.

In the above example, the wizard settings will apply to *All Payrolls* (as indicated by the radio button that is selected). You can change this setting as discussed earlier in the *Enabling the Add Employee Wizard* section of this guide.

In the following example, the *Save Settings* section indicates that the settings will apply to the *Current Payroll* only.

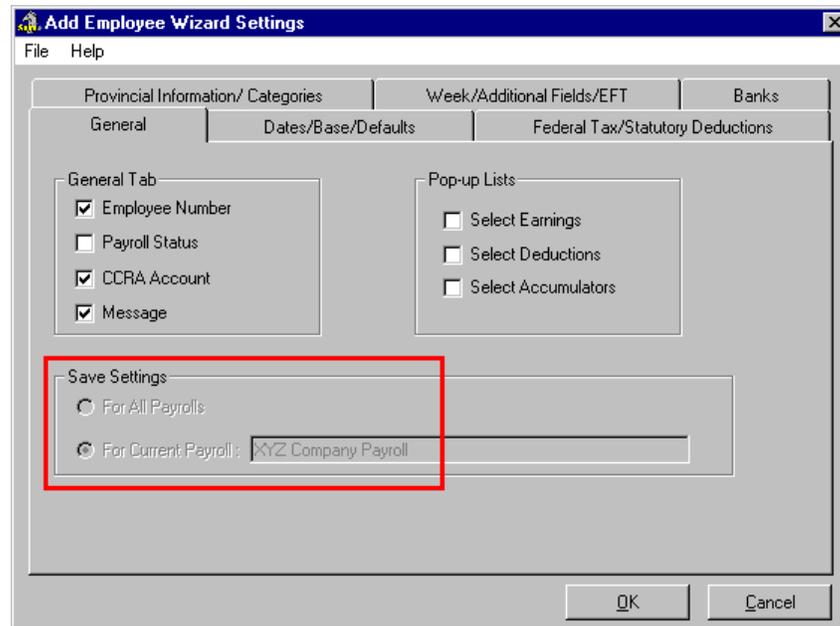


Fig. 13
These Setting apply to the Current Payroll

3. Click *OK* to apply your changes once they are complete. This completes the wizard settings.

Using the Add Employee Wizard

Once you have defined your wizard settings and enabled the wizard, you are ready to put it into use. The wizard will appear automatically during the process of adding an employee.

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

TO USE THE ADD EMPLOYEE WIZARD:

1. Open the *Payroll Module*, select a payroll, then choose the **Add Employee** command from the **Employee** menu. This displays the *Employee Name Selection* dialog box.

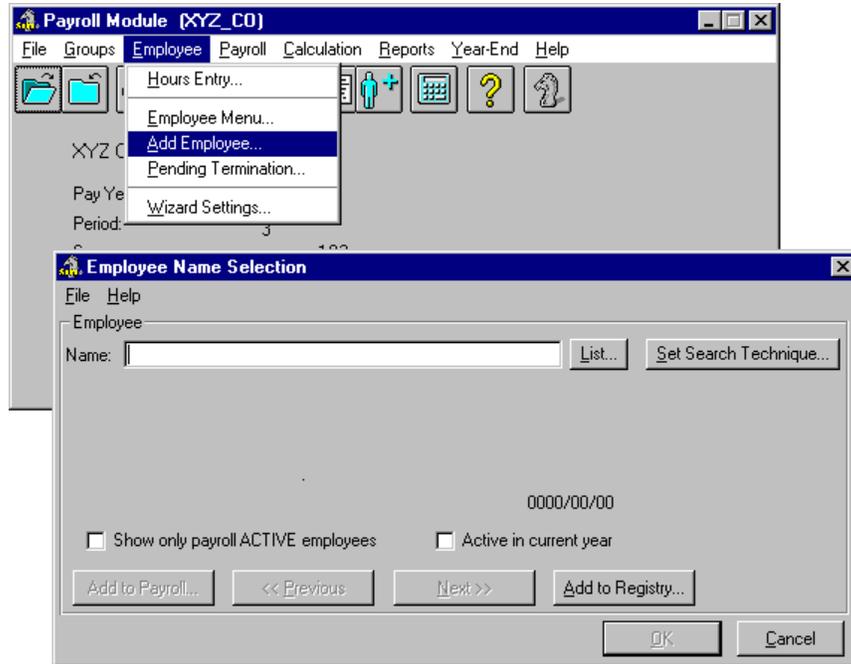


Fig. 14
The Add Employee Command Accesses the Employee Name Selection Dialog Box

2. Enter the name of the new employee in the *Name* field. Enter the surname first, followed by the given name (e.g. Smith Joe). If you think the employee may already exist in the payroll, enter the first few characters of the name then choose the *List* button to view employees who have a similarly spelled name.
3. Once the name is entered, choose the *Add to Registry* button. This closes the dialog box and displays the *Employee Information* dialog box where you can add detailed information about the employee.

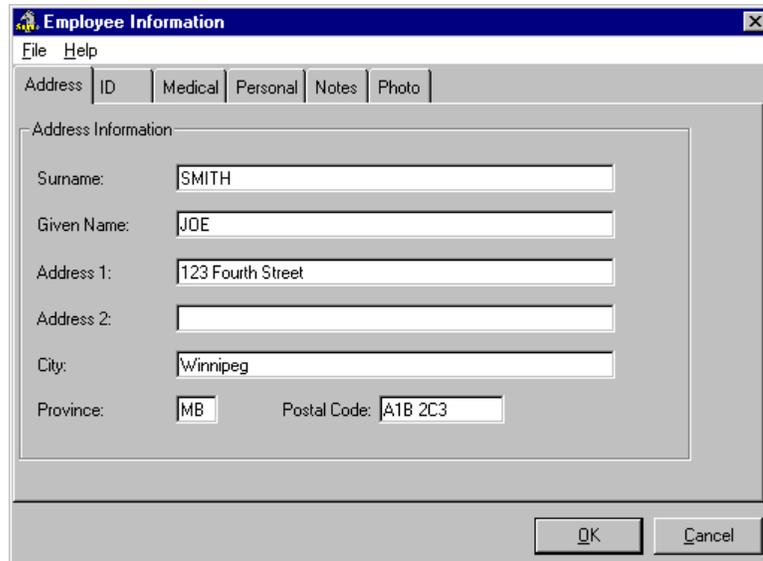


Fig. 15
The Employee Information Dialog Box

4. Move through each of the six tabs completing the information as required. Certain fields require a value while other fields are optional in nature.
5. Once you have completed the information in each tab, choose the *OK* button. This closes the *Employee Information* dialog box and returns you to the *Employee Name Selection* dialog box. You will notice that the title of this dialog box has changed to an instructional line that states *Add Employee to Payroll?*

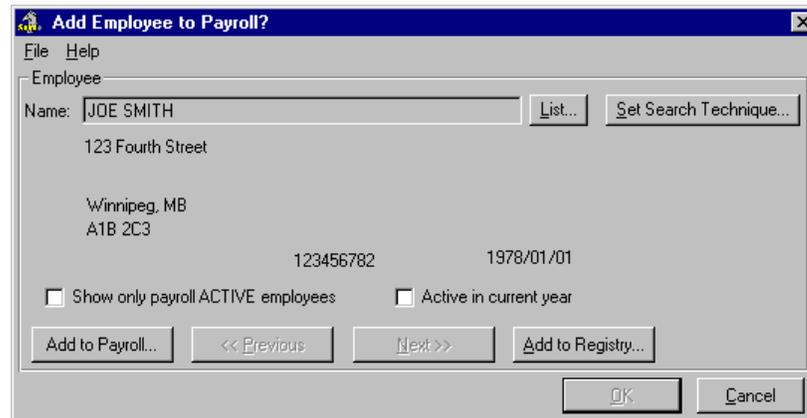


Fig. 16
The Updated Dialog Box

- If you choose the *Add to Payroll* button, you will move forward in the employee creation process (which is what this particular lesson requires).
 - If you choose the *Add to Registry* button, you will be given the opportunity of adding more employees to the registry. You would then need to add them to the payroll at a later time.
6. Choose the *Add to Payroll* button to proceed with the Add Employee process. This displays the *Add Employee to Payroll* dialog box.

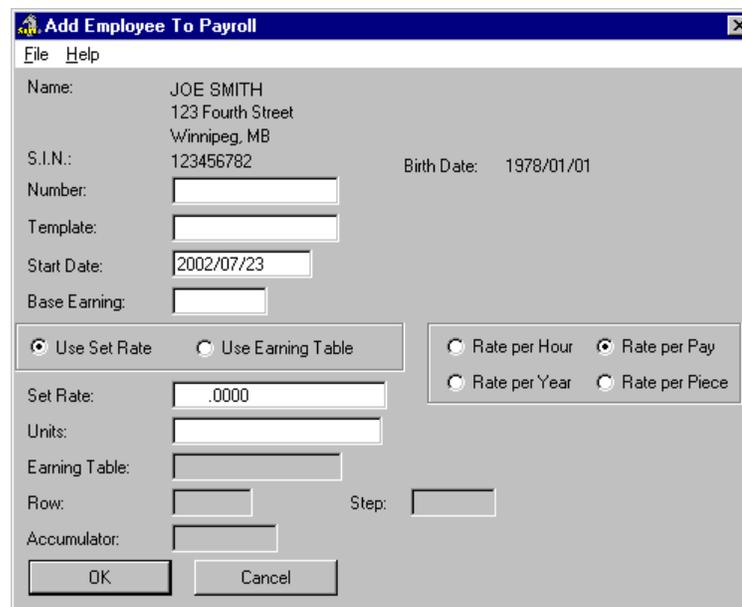


Fig. 17
The Add Employee to Payroll Dialog Box

The top half of the dialog box displays basic employee information that you entered earlier in the process. The bottom half of the dialog box allows you to define the employee's base earning information.

7. Complete the information as required then click *OK* to close the dialog box. This completes the preliminary data entry steps and displays the first step in the *Add Employee Wizard* -- the *General* dialog box.

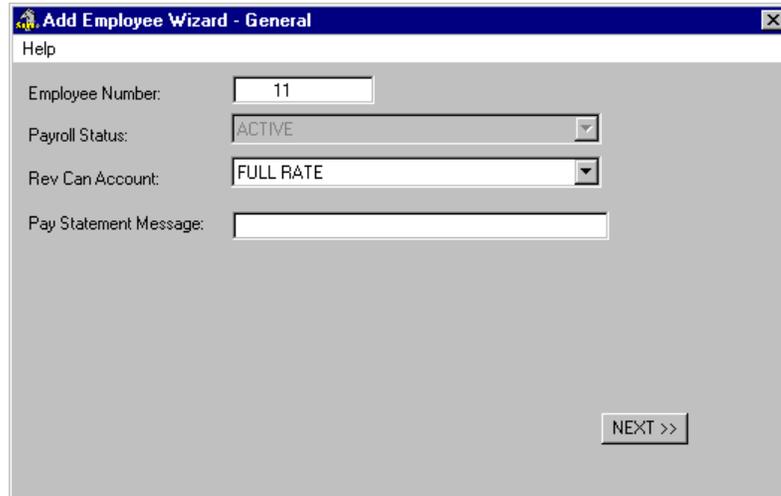


Fig. 18
The Add Employee Wizard - General Step

8. Complete the information as required then choose the *Next* button when you are ready to proceed with the next step in the Add Employee process.

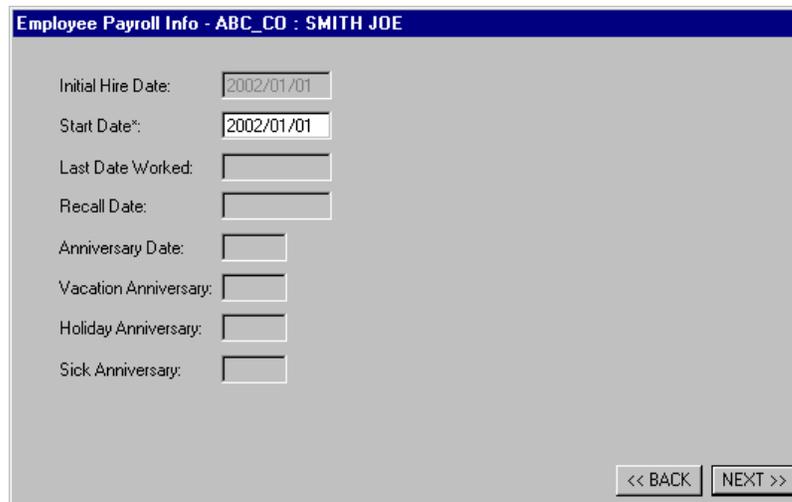


Fig. 19
The Next Step in the Add Employee Wizard

In the above example, the wizard settings indicated that only the *Start Date* was necessary for this step in the Add Employee the process. Subsequently, the other options in this dialog box are disabled and cannot be changed at this time.

Note: Changing a disabled option - If you are using the wizard and find it necessary to change one of the disabled options, you must first finish the process of adding the employee to the payroll. Once complete you can modify the individual information for the employee as required.

- Complete the information as required then choose the *Next* button when you are ready to proceed.

Fig. 20
The Next Step in the Add Employee Wizard

In the above example, the wizard settings indicated that only the *Distribution* and *Position* fields were necessary for this step.

- Complete the remaining Wizard steps to finalize the process of adding your employee. Once you come the final step, will be presented with the option of going back to review/edit your information or to finalize the addition of the employee.

Fig. 21
The Next Step in the Add Employee Wizard

Note: Incorrect Settings - If you choose the *Continue* button in the final Wizard step (as shown above) but have made one or more incorrect entries, you will be presented with a message stating this fact. You should then use the *Back* button to correct the data entry errors so that you can successfully complete the Wizard.

When is the Best Time to Set Up This Feature?

The best time to utilize the Add Employee Wizard is after you have created a new payroll and before you add your employees. This will enable you to add employees in a controlled manner. The wizard provides you an accurate and consistent method of adding employees by displaying only the fields that are relevant for each employee.

However, GrandMaster Suite is flexible and offers no restrictions on when you can use the wizard. For example, if you already have a payroll with employees, you are free to use the wizard as required.

Frequently Asked Questions

I have defined my wizard settings but the wizard does not appear when I add an employee.

After defining your wizard settings, you must enable it for use. To do this, open the *Payroll Module* (or any other main program module) and choose the **Properties - Settings** command from the **File** menu. In the Use Add Employee Wizard section of the dialog box, select the *Enable* radio button. This activates the wizard for use for all payrolls. If you want to use different wizard settings for each different payroll, choose the *Payroll Level* radio button. This will enable the program to use the payroll-specific wizard settings.

When using the wizard, I would like to edit certain options that are presently disabled (grayed out).

Your wizard settings directly control the options that are available for editing while the wizard is in use. To enable an option that is presently disabled, choose the **Wizard Settings** command from the Payroll Module's **Employee** menu. In the *Add Employee Wizard Settings* dialog box, locate the desired option in the available tabs and place a check in its corresponding box. Click *OK* to save the wizard setting change. The next time you run the wizard, the option will be available for editing.

How do I make wizard settings apply to a specific payroll instead of all payrolls?

The program default is to apply wizard settings for use with all payrolls. The program also offers the option of applying wizard settings on a payroll-by-payroll basis. To do this, open the *Payroll Module* (or any other main program module) and choose the **Properties - Settings** command from the **File** menu. In the *Use Add Employee Wizard* section of the dialog box, select the *Payroll Level* radio button. This enables the wizard to use payroll-specific settings. The next time you update a wizard setting, the change will apply only to the current payroll.