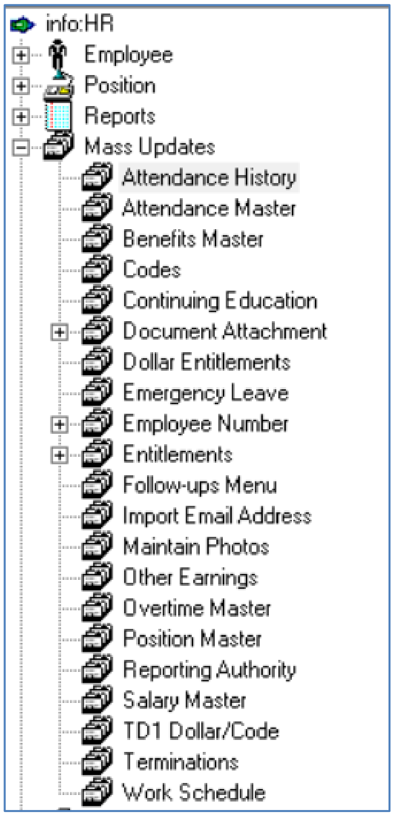
Contents

General Information

Menu Structure

To access the Mass Updates Section of info:HR expand the Mass Updates Menu item. Once the menu is expanded select the menu item of interest.



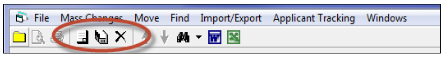
Mass Updates

The Mass Updates Section provides the ability to make Mass changes to the system in various areas such as Attendance, Benefits, Codes and Entitlements. It is important to remember when working with in this menu the changes made can affect the entire system and are usually irreversible. It is *recommended* to complete a backup of the data base prior to performing any mass updates.

Functions

There are three functions which can be performed. The buttons are found at the top of the screen. If the button is greyed out you are not able to use the function in the screen you are working in.

Buttons



Buttons

Button	Purpose
Mass Add	Provides the ability to add a new records. When completing this action, you will click the Mass Add ( ) button after the appropriate information has been entered into the fields.
Mass Update	Provides the ability to modify or update existing records. When completing this action, you will click the Mass Update button ( ) after the appropriate information has been input into the fields.
Mass Delete	Provides the ability to delete existing records. When completing this action, you will click the Mass Delete ( ) button after the appropriate information has been entered in to the fields.

Selection Criteria

Selection Criteria is a very important part of Mass Updates. In Mass Updates most screens have Selection Criteria which can be utilized to apply changes. The Selection Criteria determines the group of employees who will be affected by the changes being made. If you leave the Selection Criteria blank the changes being made will affect all employees. If you would like changes to affect e.g. a certain department enter the Department Code into the Selection Criteria.

Selection Criteria specific to the function will be explained for each function.

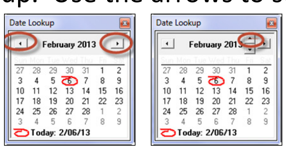
Fields

There are different types of fields that will determine how much information can be entered.

Short - Provides the ability to select one value.

Long - Provides the ability to select multiple values.

Date Range - Date Range Provides the ability to select a specific date range. To select a date you can enter the date by clicking in the field and typing the date or you can click on the calendar icon and select the date from the Date Look-up. Use the arrows to select the proper month and Year.



Magnify Glass - Provides the ability to open up a look-up table.

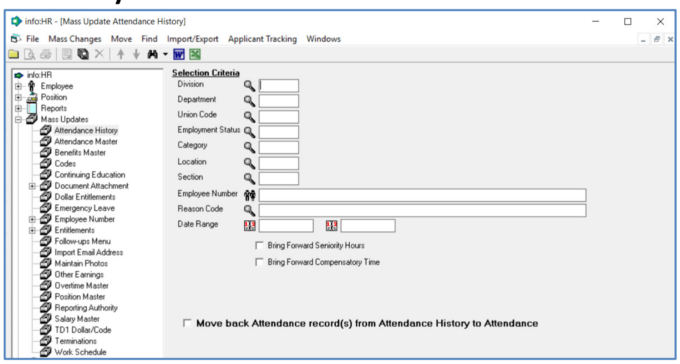
People - Provides the ability to open the employee look-up.

Mass Updates

Attendance History

This function provides the ability to archive a selected group of *Attendance* records. All details of each record of *Attendance* are saved and may be accessed through the **Attendance History** screen or report. It is *recommended* to perform this function as a part of a yearend process. If all Attendance records remain in the Attendance Master then reporting becomes sluggish in the info:HR web modules.

Screen layout:



Selection Criteria Specific to Attendance History - Provides the ability to define the group of records to be moved into Attendance History. If an item on the Criteria is left blank, then all records for that criteria will be moved to Attendance History. If a code is entered into any of the Selection Criteria fields then only employees' attendance records with that code in their profile will be moved into Attendance History.

- For example: if you enter a Department Code in the Selection Criteria*,* info:HR selects Attendance records for that Department only to be moved to Attendance History.

Selection Criteria

Field	Purpose
Date Range	Provides the ability to move a selected Date Range in to Attendance History. Example: If you are closing off 2018 the Date Range would be 01/01/2018 – 12/31/18. By setting this Date Range only 2018 Attendance records will be moved to Attendance History.
Bring Forward Seniority Hours	Provides the ability to bring forward Seniority Hours from the archived Attendance records. This would be used by organizations that need to print a Seniority List by Hours Worked. Seniority hours are identified by having the Seniority Flag checked on the attendance record.
Bring forward Compensatory Time	Provides the ability to bring forward any Compensatory Time banked by employees

Field	Purpose
	from the previous year. This is to be used only if you are using OT and CT codes to track banked time. When this box is checked info:HR will calculate the hours banked for each employee and an Attendance code of OTBF will be created for the new year with those hours carried over. Do Not check this box if you are using Overtime Master.

Once you are satisfied with your selection criteria and the date range to complete the process of moving Attendance into History click the Mass Update icon ( ) at the top of the screen. The system asks "Are you sure you want to update all Records for these criteria?" This is a good opportunity to double check the criteria to ensure you are moving the correct Attendance records. When you are satisfied click "**Yes**".

After the move is completed, the system displays "Do you want to print a list of employees updated?" If you select **"Yes"** a report will be generated listing all employees' names that were affected by the move. You may bypass the report by clicking **"No"**.

Report Sample:

Date: 2/27/13 Release 4.1 Page: 1
Time: 11:50:11 AM Mass Update Attendance History - Employee Details RZEmpList2

11026	Abbott, John	1051	Adams, Karen
1050	Armstrong-Smith, Grant	1013	Brown, Thomas
2028	Browning, Janice	5545	Darksey, Pat
1025	Davis, Celia	5000	Haile, Jenny
5001	Haile, William	1012	King, Debra
1231	Sampson, Harry	1021	Selby, Murray
5506	Smith, Jane	8524	Wesslier, Johnaton

Move back Attendance record(s) from Attendance History to Attendance – Provides the ability to undo a transfer of records. Once you have completed the original transfer and after checking you have found the transfer to be incorrect for some reason, use the same Selection Criteria and Date Range, check the Move Back box and click the mass update button. All the records will be moved back from History to active Attendance.

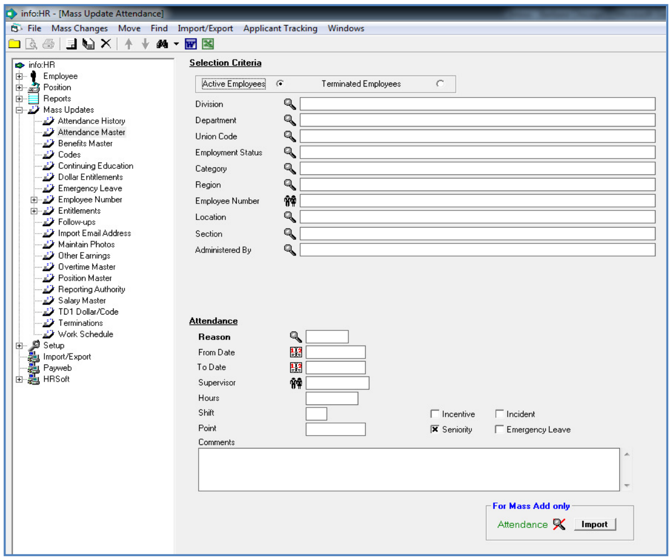
For instance:
To Move all Attendance records to History for full-time employees within a Department for the year beginning January 1, 2018 and ending December 31, 2018:

1. From *Mass Changes*, click *Attendance History*.
2. Enter the *Department* code in the *Department* field.
3. Click the down arrow on the *Category* field and select *FT* employees.
4. Enter 01/01/18 in the *From* (Date Range).
5. Enter 12/31/18 in the *To* (Date Range).
6. Check the Bring Forward Seniority hours and Compensatory Time boxes if required.
7. Click the *Update* icon.

Attendance Master

This function provides the ability to mass add, change or delete Employee Attendance records for either Active or Terminated employees. A general use for this function may be to record statutory holidays, organization shut downs, or department closures.

Screen Layout:



Selection Criteria	Purpose
Reason	An Attendance code must be entered for the records to be generated.
From Date/To Date	Provides the ability to enter a single day or a range of days.
Supervisor	Provides the ability to override the employee's Reporting Authority #1 with the number entered on the screen. Leave this blank to use the default setting.
Hours	Number of hours associated with the Attendance Reason code.
Shift	Provides the ability to enter a shift.
Point	Provides the ability to record points to the record. If left blank, the system uses the Point value that is associated with the Attendance Reason code.
Comments	Provides the ability to enter a comment.
Check Boxes	When checked equal **Yes**. If left unchecked, the system uses the default value that is associated with the Attendance Reason code.
Import	Provides the ability to attach a document to the records.

Common Error Messages

Records for this selection do not exist.

- This error message displays when the system cannot find matching employee or employee/attendance information as specified. Check the *Selection Criteria* and *Attendance* record (date, reason, etc.) information entered and re-enter.

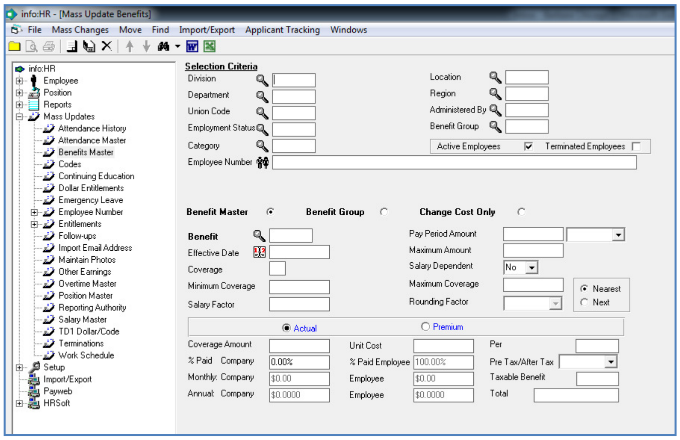
Error # *3075*
This error occurs when you enter an apostrophe in the *Comments* area. Click *No* — do not continue. Re-enter the *Mass Changes* function and re-enter the *Attendance* record omitting the apostrophe in the *Comments*.

Benefits Master

This function provides the ability to make Mass changes to an individual benefit or a Benefit Group by clicking the radio buttons **Benefit Master**, **Benefit Group** or **Change Cost Only** .

If Benefit Groups are used, this function cannot be used to mass update an individual benefit that is contained within a Benefit Group. Mass changes to those benefits must be completed under the Setup / Benefit Group Master menu.

Benefit Master



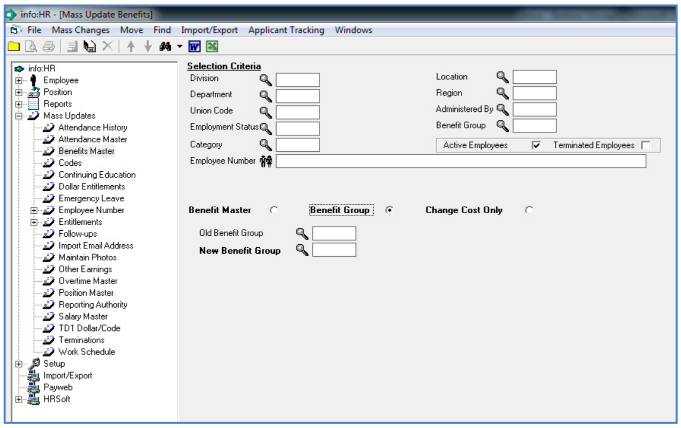
This screen is used to add, change or delete employees for a single benefit and is divided into two sections. The first section deals with the **Selection Criteria** and the second section defines the details of the benefit. Changes to both the active and terminated employee benefits can be made using this function.

To use this screen:

1. Determine the group of employees whose Benefits will be affected by using the **Selection Criteria**. If an item on the Criteria is left blank, then all records for that item will be selected. For example, if you enter a specific Department number in the criteria, info:HR selects employees only for that Department. If Department is left blank, then info:HR selects records according to other criteria entered with no restrictions on Departments.
2. Enter the **Benefits** information. These fields are defined in the Benefit Group Master setup section of the Setup User Manual. Please refer to that document for more details
3. To enter new benefit records, click the mass add icon button.
4. To make changes to existing benefit records, click on the mass update icon button or the mass delete icon to delete selected records.

Benefit Group

By clicking the Benefit Group radio button the screen changes to provide the ability to change a Benefit Group code. This update CHANGES the code but not the benefits associated with it. Caution is advised when using this function.



This screen is used to change employees' Benefit Group Code from an old code to a new/revised code and is divided into two sections. The first section deals with the **Selection Criteria** and the second section defines the old and new benefit group code. Changes to both the active and terminated employee benefits codes can be made using this function.

To use this screen:

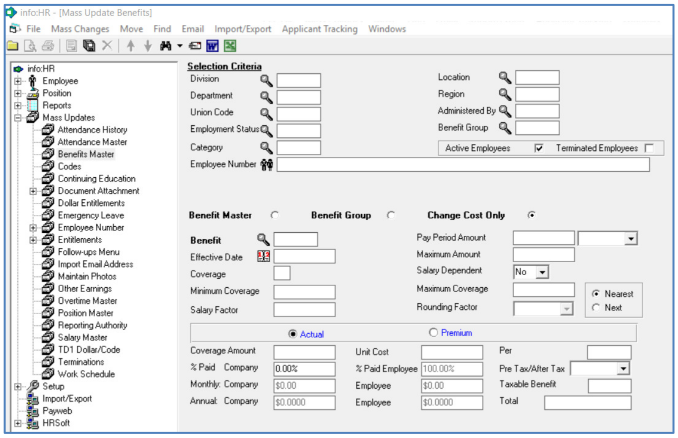
1. Determine the group of employees whose Benefit Group Codes will be affected by using the **Selection Criteria**. If an item on the Criteria is left blank, then all records for that item will be selected. For example, if you enter a specific Department number in the criteria*,* info:HR selects employees only for that Department. If Department is left blank, then info:HR selects records according to other criteria entered with no restrictions on Departments.
2. Enter the **Old Benefit Group Code** and **New Benefit Group Code**.
3. To process the change to the employees' Benefit Group Code, click on the mass update icon  button.

Common Error Message

Records for this selection do not exist.

- This error message displays when the system cannot find matching employee or employee/benefit information as specified. Check the *Selection Criteria* and *Benefit* information entered and re-enter.

Change Cost Only

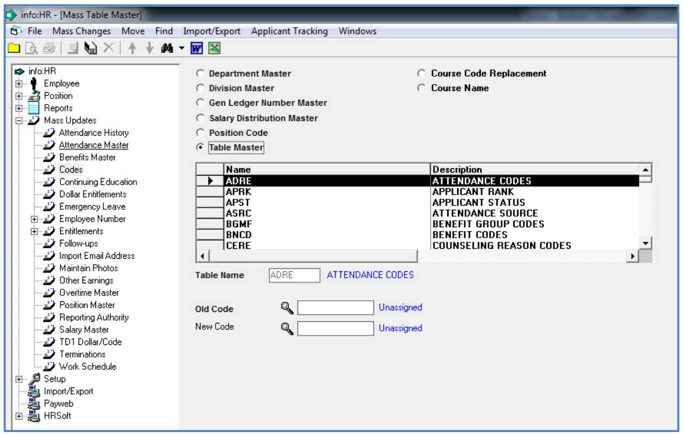


To use this screen:

1. Determine the group of employees whose Benefits will be affected by using the **Selection Criteria**. If an item on the Criteria is left blank, then all records for that item will be selected. For example, if you enter a specific Department number in the criteria, info:HR selects employees only for that Department. If Department is left blank, then info:HR selects records according to other criteria entered with no restrictions on Departments.
2. Enter the **Benefits** information. These fields are defined in the Benefit Group Master setup section of the Setup User Manual. Please refer to that document for more details
3. To enter new benefit records, click the mass add icon  button.
4. To make changes to existing benefit cost, click on the mass update icon  button or the mass delete icon  to delete selected records.

Codes

This function provides the ability to assign a new code to an existing code or to merge multiple codes into a single code. All codes uses in info:HR can be mass changed in this function. A code may be a master file table or individual table codes created in the data entry screens.

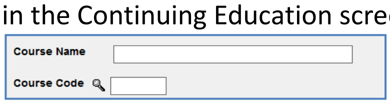


By clicking on the radio buttons you can select which master file or table code is to be updated. When clicking on the Table Master you must select the Name where the code is stored then complete the update.

Master files include:

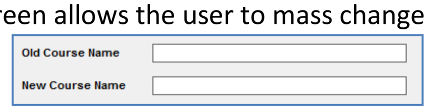
1. Department
2. Division
3. G/L Number
4. Salary Distribution
5. Position

Code tables are found under Table Master.
This screen also allows the user to mass change Course Code using the Course Name which is located in the Continuing Education screen.



- Both Course Name and Code are required for this mass updated.
- Course Name is case-sensitive and must be typed exactly as it is found on the Continuing Education records.

This screen allows the user to mass change a Course Name:



- The Old Course Name <u>must be an exact match</u> in info:HR in order to be changed to the New Course Name.
- If no exact match is found, the application reports that no updates can be completed.

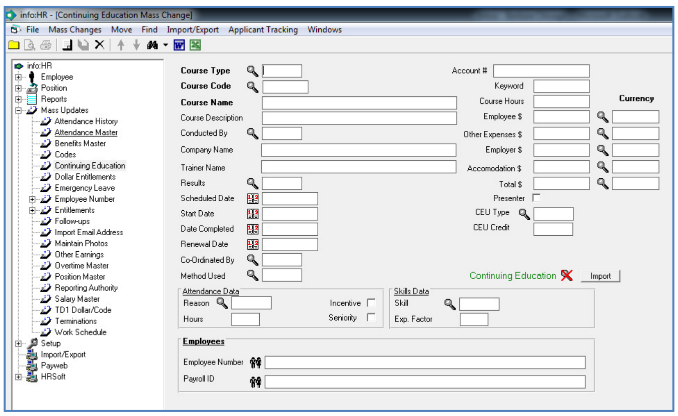
Selection Criteria

Field	Purpose
Table Name	Will be populated when the code table is selected from the grid box. The grid box does not appear when the Table Master is not selected.
Old Code	Can be entered manually or by using the look-up.
New Code	Enter the new code or select from the look-up. **Note:** The code must already exist in the table.

Continuing Education

This function provides the ability to update multiple employee records with a Continuing Education record. If needed and the function being performed is a Mass Add, the employees' Attendance and Skills data can be updated too.

The Continuing Education Mass Update is unique in the sense that there is no selection criteria used by the update program. The user enters the course information and then selects a group of employees who have taken the course by either entering/selecting by Employee Number or Payroll ID.



Selection Criteria

Field	Purpose
Course Type	Provides the ability to select or enter a Course Type code.
Course Code	Provides the ability to select or enter a Course code.
Course Name	Provides the ability to enter the name of the course.
Course Description	Provides the ability to enter a description of the course.
Conducted By	Provides the ability to select or enter a code corresponding to the Organization that provided the course.
Company Name	Provides the ability to enter an organization; this will automatically be populated when a Conducted By code is selected.
Trainer Name	Provides the ability to enter the name of the Trainer.
Results	Provides the ability to select or enter the results from the course.
Schedule Date	Provides the ability to enter the date the course was scheduled.
Start Date	Provides the ability to enter the actual start date of the course.

Field	Purpose
Date Completed	Provides the ability to enter the date the course was completed. This is a mandatory field. Courses cannot be entered without a Date Completed.
Renewal Date	Provides the ability to enter a date the course must be renewed. This date creates a Follow-Up record with a Follow-Up Type of “EDUC”.
Co-Ordinated By	Provides the ability to select or enter a code corresponding to who co-ordinated the course.
Method Used	Provides the ability to select or enter the training method used. For example: online, classroom, self-study etc.
Import	Provides the ability to attach a scanned document to the record.
Account #	This is a free-format field that can track information about the code.
Keyword	This is a free-format field that can track information about the code.
Course Hours	Provides the ability to track the number of hours. This could be different than the Attendance Hours updated in the Attendance Master.
Employee $	Provides the ability to track the dollar amount paid by the employee.
Other Expenses $	Provides the ability to track the dollar amount paid for other expenses related to the course.
Employer $	Provides the ability to track the dollar amount paid by the employer.
Accommodation $	Provides the ability to track the dollar amount associated with accommodations.
Total $	A Total $ is automatically calculated using the above entered costs.
Presenter	Provides the ability to track the employees who are presenters of the course.
Currency	Provides the ability to track currency type.

Attendance Data

This area of the screen is only available for the Mass Add function. When entering information in this section, the system creates an Attendance record for each employee affected.

Field	Purpose
Reason	Provides the ability to enter an attendance reason code.
Hours	Provides the ability to enter the total hours take for the course.
Incentive	Provides the ability to mark the hours as an incentive hours.
Seniority	Provides the ability to mark the hours as Seniority hours.

Skills Data

This area of the screen is only available for the Mass Add function. When entering information in this section, the system creates a Skills record for each employee affected. Depending upon the course, Employees may not have their skills profile updated.

Field	Purpose
Skill	Provides the ability to enter a Skill code.
Exp. Factor	Provides the ability to enter an experience factor for the record.

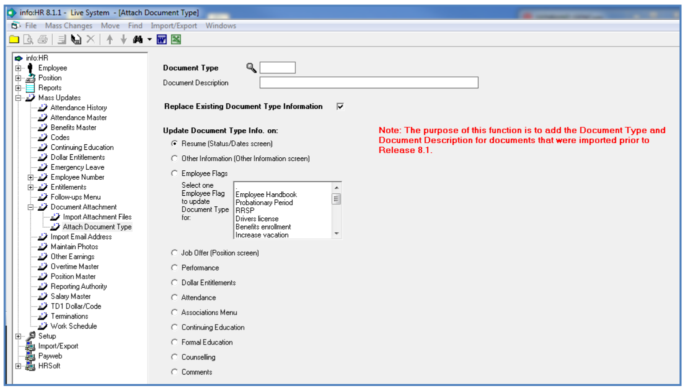
To continue with the update, the user must enter either:

1. **Employee Number** – Provides the ability to enter multiple employee numbers. This allows you to select the employees affected by the update.
2. **Payroll ID** – Provides the ability to select employees by Payroll ID number.
    a. **Note:** If you are manually entering the employee numbers or Payroll ID numbers they must be separated by a (,) and no spaces between the numbers. They can also be selected from the employee look-up by using the Ctrl key and clicking to select employees.

Document Attachment

Attach Document Type

This function adds the new Document Type and Description to the existing pre-Release 8.1 documents. Any documents uploaded from Release 8.0 onwards required this identifier in order to complete the upload. It is highly recommended to perform this function soon after installing Release 8.1. Once completed, you likely won't need to use this feature anymore.



- Enter **Document Type**. A Document Type needs to be created for each type of document that is stored in info:HR.
- Enter the **Document Description**.
- **Replace Existing Document Type Information** check box will add missing document type information. *NOTE:* when this function is checked not only will missing document type information be created, existing document type information will be replaced.
- Click on the **Update Document Type Info. on** that corresponds to the Document Type.
- Click on the Mass Update icon to assign or replace the document type for the selected documents.

When selecting a screen to be updated a Reason code will be required for some screens. For example when updating the Dollar Entitlements you will be required to select the Dollar Entitlement code for update.

Selection Fields

Field	Purpose
Document Type	Provides the ability to select a Document Type code.
Document Description	Provides the ability to add a document description

Field	Purpose
Replace Existing Document Type Information	When checked provides the ability to replace existing documents, when unchecked it will only update records without a document attached.

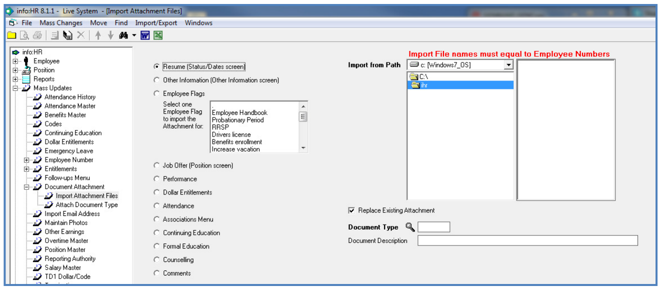
Radio Buttons

Radio Button	Purpose
Resume	Provides the ability to attach a Document Type Code to documents stored on the Status and Dates screen
Other Information	Provides the ability to attach a Document Type Code to documents stored on the Other Information screen.
Employee Flags	Provides the ability to attach a Document Type Code to documents stored by Flag Reason on the Employee Flags.
Job Offer	Provides the ability to attach a Document Type Code to documents stored on the Position screen.
Performance	Provides the ability to attach a Document Type Code to documents stored on the Performance screen.
Dollar Entitlements	Provides the ability to attach a Document Type Code to documents stored on the Dollar Entitlements screen.
Attendance	Provides the ability to attach a Document Type Code to documents stored on the Attendance screen.
Associations	Provides the ability to attach a Document Type Code to documents stored on the Associations screen.
Continuing Education	Provides the ability to attach a Document Type Code to documents stored on the Continuing Education screen.
Formal Education	Provides the ability to attach a Document Type Code to documents stored on the Formal Education screen.
Counselling	Provides the ability to attach a Document Type Code to documents stored on the Counseling screen
Comments	Provides the ability to attach a Document Type Code to documents stored on the Comments screen.
Termination	Provides the ability to attach a Document Type Code to documents stored on the Termination

Radio Button	Purpose
	screen.
Position Skills	Provides the ability to attach a Document Type Code to documents stored on the Skills screen.
Health & Safety - Incidents	Provides the ability to attach a Document Type Code to documents stored on the Incident screen.
Health & Safety – Concerned about Clams Written Submission (Form 7)	Provides the ability to attach a Document Type Code to documents stored on the Health and Safety Documentation screen.
Health & Safety – Written Modified Other (Form 7)	Provides the ability to attach a Document Type Code to documents stored on the Health and Safety Documentation screen.

Import Attachment Files

This function is used to attach documents, by Document Type, to employee profiles.



- It is recommended to use a separate folder for each document type. The filename equals the employee number. For example:
  - Document Type = RES
  - Document Description = Current Resume on File
  - File folder name = Resumes
  - File names = 1020.pdf, 1021.doc, 1022.docx, etc.
- Select the document type.
- Enter **Document Type** and **Description.**
- Using the down arrow key across from **Import from Path**, find the appropriate folder.
- Select the file(s) to be imported by clicking on the fiel name. You may use the Ctrl key to select individual files or Shift key to select a group of files.
- Click on the Mass Update icon to upload all the selected documents for the employees.
- Documents Resume, Other Information, Employee Flags, Job Offer and Performance can only import one document for each employee.
- Documents:
  - Dollar Entitlement can import multiple documents by “Entitlement”.
  - Attendance can import multiple documents by “Date & Reason”.
  - Association can import multiple documents by “Starting Date & Association”.
  - Continuing Education can import multiple documents by “Start Date & Course Code”.
  - Formal Education can import multiple documents by “School”.
  - Counselling can import multiple documents by “Counselling Date and Type”.
  - Comments can import multiple documents by “Effective & Type”.

Files to be imported must be named with the employee number of the employee the document is to be imported for. For Example: John Abbott is employee number 221026 therefor documents associated with John Abbot should be named 221026.

Selection Fields

Field	Purpose
Document Type	Provides the ability to select a Document Type code.
Document Description	Provides the ability to add a document description
Replace Existing Attachment	When checked provides the ability to replace existing documents, when unchecked a new record will be created.

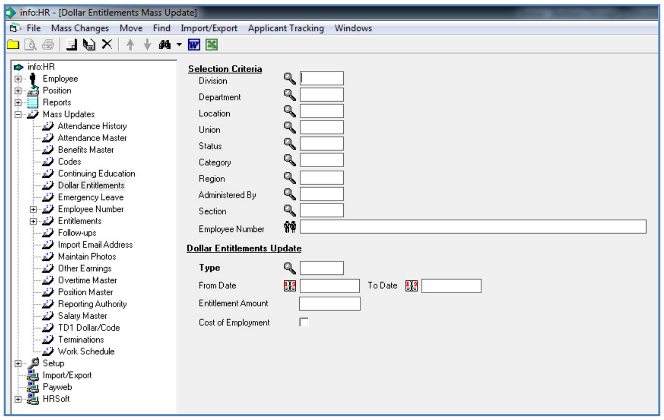
Radio Buttons

Radio Button	Purpose
Resume	Provides the ability to attach a Document Type Code to documents stored on the Status and Dates screen
Other Information	Provides the ability to attach a Document Type Code to documents stored on the Other Information screen.
Employee Flags	Provides the ability to attach a Document Type Code to documents stored by Flag Reason on the Employee Flags.
Job Offer	Provides the ability to attach a Document Type Code to documents stored on the Position screen.
Performance	Provides the ability to attach a Document Type Code to documents stored on the Performance screen.
Dollar Entitlements	Provides the ability to attach a Document Type Code to documents stored on the Dollar Entitlements screen.
Attendance	Provides the ability to attach a Document Type Code to documents stored on the Attendance screen.
Associations	Provides the ability to attach a Document Type Code to documents stored on the Associations screen.
Continuing Education	Provides the ability to attach a Document Type Code to documents stored on the Continuing Education screen.
Formal Education	Provides the ability to attach a Document Type Code to documents stored on the Formal Education screen.
Counselling	Provides the ability to attach a Document Type Code to documents stored on the Counseling screen
Comments	Provides the ability to attach a Document Type

Radio Button	Purpose
	Code to documents stored on the Comments screen.
Termination	Provides the ability to attach a Document Type Code to documents stored on the Termination screen.
Position Skills	Provides the ability to attach a Document Type Code to documents stored on the Skills screen.
Health & Safety - Incidents	Provides the ability to attach a Document Type Code to documents stored on the Incident screen.
Health & Safety – Concerned about Clams Written Submission (Form 7)	Provides the ability to attach a Document Type Code to documents stored on the Health and Safety Documentation screen.
Health & Safety – Written Modified Other (Form 7)	Provides the ability to attach a Document Type Code to documents stored on the Health and Safety Documentation screen.

Dollar Entitlements

This function provides the ability to add, update or delete Dollar Entitlements for a selected group of employees.



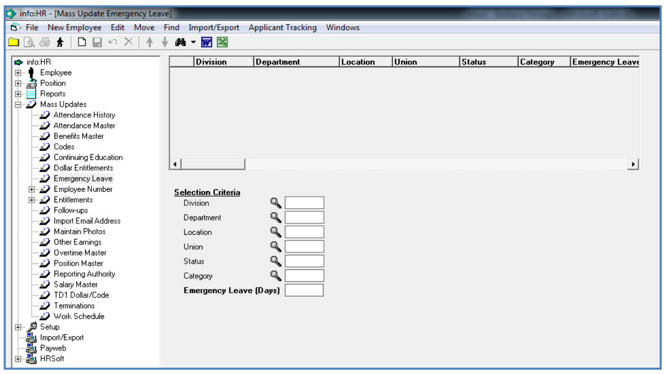
Selection Criteria

Field	Purpose
Type	Provides the ability to select or enter a valid Dollar Entitlement Type.
From Date / To Date	Provides the ability to enter a date range the entitlement.
Entitlement Amount	Provides the ability to enter the Dollar amount the employee is entitled to.
Cost of Employment	Provides the ability to indicate whether the entitlement affects the employee's cost of employment. If the Entitlement Amount is paid by the organization, click on Cost of Employment. Otherwise, leave this field unchecked.

Emergency Leave

This section provides the ability to add or change the number of Emergency Leave days for the selected group of employees. Emergency Leaves are defined once in a calendar year. For example, the ESA for the province of Ontario entitles employees to 10 Emergency Leaves per year (occurrences, not actual number of days).

The Emergency Leave bank is depleted by using an Attendance Reason Code that has been flagged as an Emergency Leave. The hours entered against this Reason Code should be the employee's default hours per day. The actual Hours per day can be entered either in Charge Code or Comments.



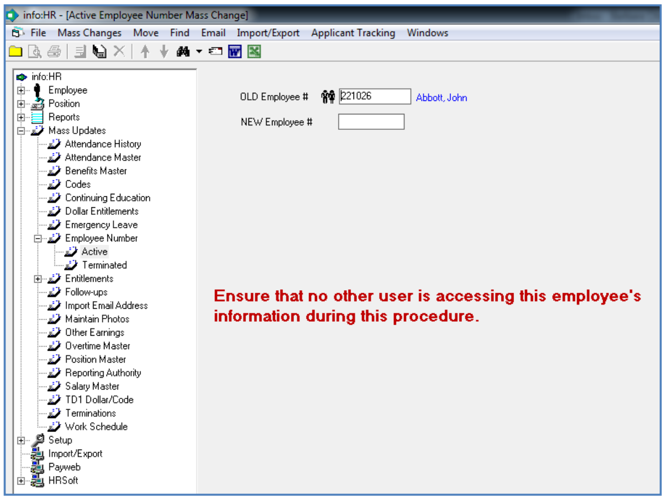
To use this screen:

1. Enter the criteria to identify the group of employees that will be affected. If all employees are affected, do not enter a Selection Criteria.
2. Enter the Emergency Leave Days and **Save** icon to save the rule. No employees have been updated yet. This only saves the rule.
3. Click the **Update Emergency Leave** button at the bottom of the screen.
    a. You will be asked if you "would like to add records for this criteria?" If you are satisfied with the criteria, click **"Yes"** and respond to each message when displayed.
    b. The system will then create/update the Emergency Leave for each employee.
4. Emergency Leave balances are found in the Attendance Master for the employee or via an Emergency Leave Report.

Employee Number

This function provides the ability to change an employee's number throughout the system. This can be done for Active or Terminated employees by selecting the appropriate menu option under Employee Number Mass Change. A mass update may be used to correct a data entry error or when going through an organizational restructuring. It is a good practice to ensure that the employee's files being adjusted are not open by other users during this step.

The mass update checks for the Old Employee Number in all tables in info:HR including employee numbers entered in the Reporting Authority and Supervisor fields. If the Old Employee Number is found, it is replaced with the New Employee Number.



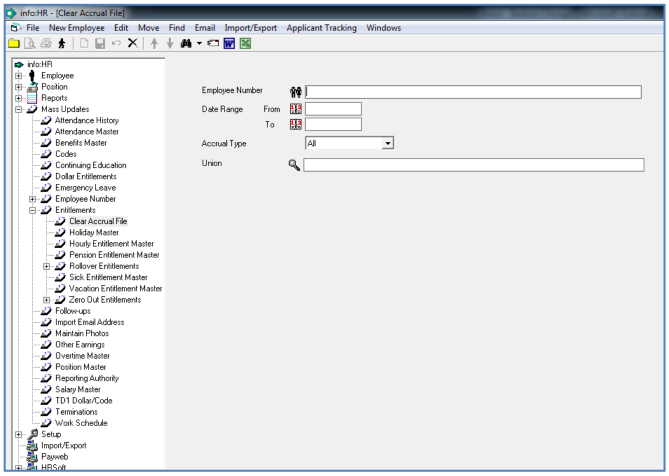
To use this screen:

1. Look up and select the employee whose Employee Number is changing.
2. Enter the New Employee Number.
3. Click on the Mass Update icon in the toolbar to begin.
    a. You will be asked if you "would like to add records for this criteria?" If you are satisfied with the criteria, click **"Yes"**.

Entitlements

Clear Accrual File

This function provides the ability to delete the employee Entitlement Accrual files. Once the records are cleared they cannot be recovered. Generally, this function is used only to clear data entry setup steps that would look confusing in the Accrual Report.



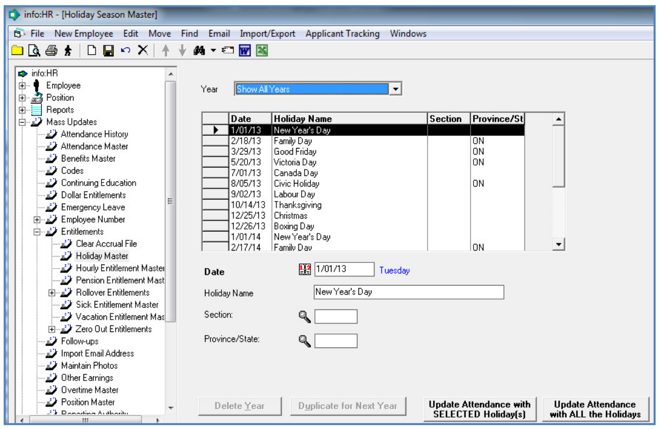
Field	Purpose
Employee Number	Provides the ability to enter a select or enter group of one or more employees. Leave this field blank to clear all employees.
Date Range	Provides the ability to enter the date range that you would like to delete the records for.
Accrual Type	Provides the ability to select the type of entitlement to delete using a list of options from the drop down menu. By default “All” Accrual Types will be deleted.
Union	Provides the ability to select or enter group of unions. Leave this field blank to delete entitlements for all unions.

The delete icon in the toolbar processes this request.

Holiday Master

This function is used to set the holiday schedule for the year. The Holiday Master can be set years in advance if the holidays are known. A Mass Update from this section will create attendance records for all holidays in each employee's Attendance Master and mark them as a statuary holiday using the Attendance Reason Code "STAT".

The Holiday Master is used in the ESS and Timesheets modules.



Field	Purpose
Year	Provides the ability to select the year you would like to create or view.
Date	Provides the ability to enter a holiday date from the calendar look-up or by manual entry.
Holiday Name	Provides the ability to assign a holiday name to the date entered.
Selection	Provides the ability to select or enter a Section that qualifies for the holiday. Leave this blank if all employees qualify for the holiday.
Province / State	Provides the ability to select or enter a Province or State that qualifies for the holiday. Leave this blank if all employees qualify for the holiday.

Buttons

Button	Purpose
Delete Year	Provides the ability to delete a selected year.
Duplicate for Next Year	Provides the ability to duplicate the holiday calendar for the next year. Once the holidays have been duplicated, you will need to edit holidays that may have a different date in the new year.

Button	Purpose
Update Attendance with Selected Holiday(s)	Provides the ability to update employee Attendance records with selected holidays. To select specific Holiday, click on the Holiday in the grid box. To select more than one holiday, use the shift or CTRL keys to select the dates.
Update Attendance with ALL the Holidays	Provides the ability to update employee attendance records with all holidays of the selected year. To select, click the down arrow on Year. It is not recommended that future-dated holidays be updated because any new employees hired after pressing this button will not have their Attendance Master include the holidays. Only employees who are active when the button was clicked will have holidays shown in the Attendance Master.

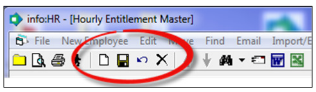
Hourly Entitlements Master

This function is used to update and maintain Hourly Entitlements. Entitlements of this type are time entitlements employees have access to on an annual basis that may increase with service time. Hourly Entitlements are typically Float Days, Personal Time, etc. granted by company or union policy. This is not to be used for Vacation or Sick entitlements.

> **Example:** An organization allows employees to take 15 hours off per year for medical appointments. An Entitlement code is assigned to the hours PT (personal time). When the rule is set up in Hourly entitlements employees will be granted a bank of 15 hours at the beginning of the year that they can draw on under the code of PT. When time is taken against this Entitlement it is recorded and deducted through the Attendance Master.

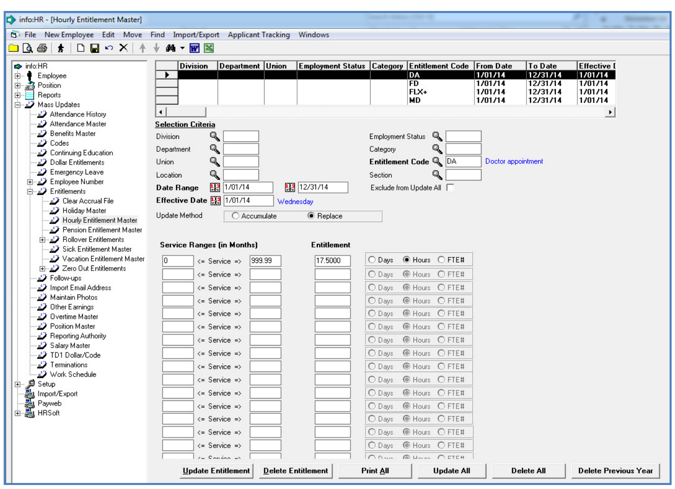
Creating Modifying and Deleting Rules

To add, change or delete rules you must use the action buttons in the top menu bar.



Buttons

Button	Purpose
New	To create a new rule, click the new record button
Modify	To modify a rule select the rule from the grid box. Make the changes required to the rule then clicking "**save"** saves the changes to the rule.
Delete	To delete a rule select the rule from the grid box then chick the delete button.



Field	Purpose
Grid Box	Provides the ability to view the Entitlement rules and select by clicking on the rule in the grid box.

Field	Purpose
Selection Criteria	When creating an Entitlement rule it is important to ensure that the employees receiving the entitlement match the rule criteria. If employees do not match the rule in some way they will not receive the entitlement upon update. **Example:** If a rule has the Employment Status of Active then only employees with a status of Active on the Status/Dates screen will receive the entitlement; an employee with a status of LOA will not receive the entitlement.
Division	Provides the ability to select a specific Division of employees the entitlement rule will apply to.
Department	Provides the ability to select a specific Department of employees the entitlement rule will apply to.
Union	Provides the ability to select a specific Union of employees the entitlement rule will apply to.
Location	Provides the ability to select a specific Location of employees the entitlement rule will apply to.
Employment Status	Provides the ability to select a specific Employment Status of employees the entitlement rule will apply to.
Category	Provides the ability to select a specific Category of employees the entitlement rule will apply to.
Entitlement Code	Provides the ability to assign a code to the Entitlement.
Selection	Provides the ability to select a specific Section of employees the entitlement rule will apply to.
Date Range	Provides the ability to enter a date range the entitlement is valid for.
Effective Date	Provides the ability to enter the date the entitlement becomes effective.
Update Method	Provides the ability to select weather the entitlement will **Accumulate** or be **Replaced** upon update. • Replace is checked by default. When updating, the Entitlement Amount calculated will replace the Hourly Entitlement's Current Year amount.

Field	Purpose
Update Method Continued	• Accumulate option will use the Entitlement Amount calculated and add the amount to the Hourly Entitlement's Current Year amount.
Exclude from update All	Provide the ability to exclude rules which are not updated then the Update All button is selected. **Example:** An organization has 6 Hourly Entitlement rules. 5 Rules are updated at the end of the Calendar Year. 1 Rule is updated at the end of the Fiscal Year. The rule which is to be updated at the end of the Fiscal should be checked with **Exclude from Update All** to ensure it is not updated in error with the other rules.
Service Ranges	Provides the ability to enter a range and the entitlement granted for the specific service range. Service Ranges are in Months. Entitlement is calculated based on Hours, Days or FTE#. **Note:** Employees **must** have hours per day, and FTE# in their Position screen for the entitlement to calculate properly.

Buttons

Button	Purpose
Update Entitlement	Provides the ability to update employees' hourly entitlement for the rule selected.
Delete Entitlement	Provides the ability to delete the employees' hourly entitlements for the rule selected.
Print All	Provides the ability to generate and print a report of all entitlement rules.
Update All	Provides the ability to update all employees' hourly entitlements for each rule. Any rules that are marked as *Exclude from Update All* will be skipped.
Delete All	Provides the ability to delete all employees' hourly entitlements for each rule.
Delete Previous Year	Provides the ability to delete the employees' Hourly Entitlement for the year that has just passed. **Note:** Deleting and updating entitlements directly affects the employee records. Deleting an entitlement will delete the entitlement

Button	Purpose
	from the employee record. Updating will update or add the entitlement to the employee record.

About the Update Method and Update Buttons

Annual Accruals

An annual accrual for an entitlement means that the year's total entitlement is earned by the employee at the beginning of the year. In the Company Master, the *Entitlement Earned* must say "Annual".

Use the *Update Method* with the **Replace** option checked and the *Update Entitlement* each time you are maintaining *Hourly Entitlements* for that specific Entitlement Code. If you have entered the entitlement incorrectly, the *Delete Entitlement* button can be used to delete the entitlement from all the employee records. Corrected information can be re-added.

Monthly Accruals

A monthly accrual for an entitlement means that the year's entitlement is earned on a periodic basis. In the Company Master, the *Entitlement Earned* must say "Monthly".

The *Entitlement Amount* on the screen should equal the periodic amount based on the interval being updated. For example: If the interval is monthly, the *Entitlement Amount* would equal the annual entitlement divided by 12. The *Entitlement Amount* is <u>added</u> to the current year's entitlement. Use the *Update Method* **Accumulate.** It is important to make sure that the *Effective Date* is changed and saved prior to updating the employee's entitlements. If you were doing a monthly entitlement, the *Effective Date* would be the first, middle or last day of each month (depending upon your internal entitlement policy).

If you have entered the entitlement incorrectly, the *Delete Entitlement* button can be used to delete the entitlement from all the employee records. Corrected information can be re-added. Under certain circumstances, you may need to *Zero Out Current Year Hourly Entitlements* to correct the problem. Refer to that section of the User Manual.

Annualized Monthly Accruals

An annualized monthly accrual for an entitlement means that the year's entitlement is earned at the beginning of the entitlement year but that employee who cross over into the next service range will receive a portion of the increased entitlement amount based on when their anniversary month falls in comparison to the end of the entitlement year. In the Company Master, the *Entitlement Earned* must say "Annualize Monthly".

The *Entitlement Amount* on the screen should equal the monthly amount of the annual entitlement. Use the *Update Method* with the **Replace** option checked and the *Update Entitlement* each time you are maintaining *Hourly Entitlements* for that specific Entitlement Code.

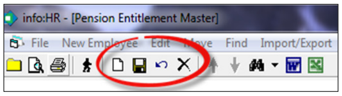
If you have entered the entitlement incorrectly, the *Delete Entitlement* button can be used to delete the entitlement from all the employee records. Corrected information can be re-added. Under certain circumstances, you may need to *Zero Out Current Year Hourly Entitlements* to correct the problem. Refer to that section of the User Manual.

Pension Entitlement Master

This function is used to update and maintain Pension Entitlements. This function updates the Pension Percentage found in the Banking Information screen.

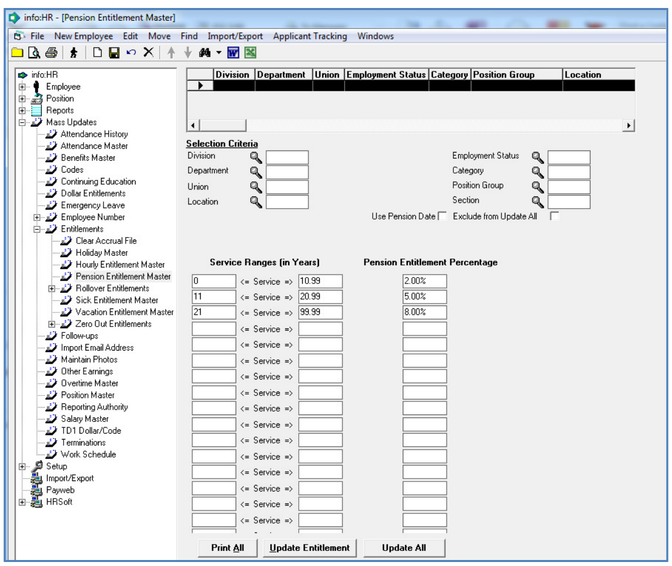
Creating Modifying and Deleting Rules

To add, change or delete rules you must use the action buttons in the top menu bar.



Buttons

Button	**Purpose**
New	To create a new rule, click the new record button
Modify	To modify a rule select the rule from the grid box. Make the changes required to the rule then clicking "**save"** saves the changes to the rule.
Delete	To delete a rule select the rule from the grid box then chick the delete button.



Information Validation

Field	**Purpose**
Grid Box	Provides the ability to view the Entitlement rules and select by clicking on the rule in the grid box.
Selection Criteria	When creating an Entitlement rule it is important to ensure that the employees receiving the entitlement match the rule criteria. If employees do not match the rule in

Field	Purpose
Selection Criteria Continued	some way they will not receive the entitlement upon update. **Example:** If a rule has The Employment Status of Active then only employees with a status of Active on the Status/Dates screen will receive the entitlement; an employee with a status of LOA will not receive the entitlement
Division	Provides the ability to select a specific Division of employees the entitlement rule will apply to.
Department	Provides the ability to select a specific Department of employees the entitlement rule will apply to.
Union	Provides the ability to select a specific Union of employees the entitlement rule will apply to.
Location	Provides the ability to select a specific Location of employees the entitlement rule will apply to.
Employment Status	Provides the ability to select a specific Employment Status of employees the entitlement rule will apply to.
Category	Provides the ability to select a specific Category of employees the entitlement rule will apply to.
Position Group	Provides the ability to select a Position Group of employees the entitlement rule will apply to.
Section	Provides the ability to select a specific Section of employees the entitlement rule will apply to.
Use Pension Date	Provides the ability to have a rule calculate based on the Pension date from the status and dates screen of the employee.
Exclude from update All	Provide the ability to exclude rules which are not updated then the Update All button is selected.
Service Ranges	Provides the ability to enter a range and the entitlement granted for the specific service range. Service Ranges are in Years. Entitlement is calculated based on Pension Entitlement Percentage.

Buttons

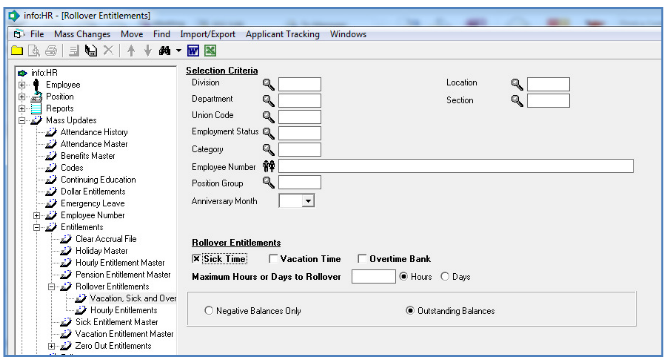
Button	Purpose
Print All	Provides the ability to generate and print a report of all entitlement rules.
Update Entitlement	Provides the ability to update employees' pension entitlement for the rule selected.
Update All	Provides the ability to update all employees' pension entitlements for each rule.

Rollover Entitlements

The Rollover Entitlements menu is typically used as part of your yearend process, however depending on your company policies it may be necessary to complete a rollover on a monthly basis. The rollover will move the selected entitlements balances from the outstanding into the previous column, carrying over the outstanding balances, which enables the employee to use the entitlement in the next year or month. This function is completed prior to updating entitlements for the next term. During the Rollover Vacation, Sick or Hourly Entitlements, the application deletes all previous year's Follow-up records for the "exceeding entitlement' Follow-Up Codes.

Vacation, Sick and Overtime

This function deals specifically with Vacation, Sick and Overtime banks. When using this function you are able to move the outstanding balances of Vacation, Sick and Overtime from the outstanding into the previous column. Use the mass update ( ) icon in the toolbar to process the rollover.



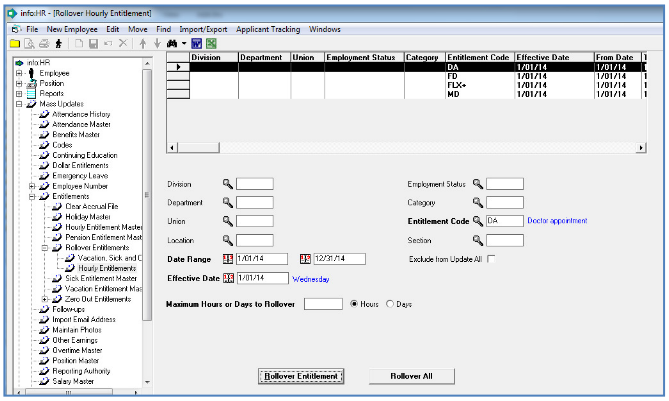
Selection Criteria

Field	Purpose
Division	Provides the ability to select a specific Division of employees whose entitlements will be rolled over.
Location	Provides the ability to select a specific Location of employees whose entitlements will be rolled over.
Department	Provides the ability to select a specific Department of employees whose entitlements will be rolled over.
Selection	Provides the ability to select a specific Section of employees the entitlement rule will apply to.
Union Code	Provides the ability to select a specific Union of employees whose entitlements will be rolled over.
Employment Status	Provides the ability to select a specific Employment Status of employees whose entitlements will be rolled over.

Field	Purpose
Category	Provides the ability to select a specific Category of employees whose entitlements will be rolled over.
Employee Number	Provides the ability to select by employee number the employees whose entitlements will be rolled over.
Position Group	Provides the ability to select a specific Position Group of employees whose entitlements will be rolled over
Month	Provides the ability to select the anniversary month to be rolled over. This is typically used when completing a monthly rollover.
Sick Time	When checked the sick time outstanding will be rolled over. If left unchecked the balances will not be rolled from outstanding to previous.
Vacation Time	When checked the vacation time outstanding will be rolled over. If left unchecked the balances will not be rolled from outstanding to previous.
Overtime Bank	When checked the overtime bank will be rolled over. If left unchecked the balances will not be rolled from outstanding to previous.
Maximum Hours or Days to rollover	Provides the ability to set a maximum of days or hours to be rolled over. **Example:** If your policy states a maximum of 40 hours of vacation can be rolled over you would enter 40 and click on the Hours radio button. When this is set they system will roll over up to 40 hours for employees. If an employee has over 40 hours the system will not roll the excess over.
Negative Balances Only	When checked only the negative outstanding entitlement balances will be rolled over.
Outstanding Balances	When checked will roll over both negative and positive outstanding entitlement balances.

Hourly Entitlements

This function is used to roll over hourly entitlements. This will take the outstanding hourly entitlement balances and move them to the previous column.



Grid Box – Displays the Hourly entitlement rules. To select a rule click on the rule, the criteria for the rule selected will display below.

To roll over the Hourly Entitlements select the rule from the grid box. Enter the maximum days or hours to be rolled over if required.

Buttons

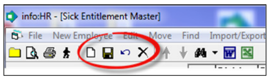
Button	Purpose
Rollover Entitlement	Provides the ability to rollover only the entitlement selected.
Rollover All	Provides the ability to rollover all entitlements. **Note**: When clicking on Rollover All, if there is a value in Maximum hours or days this will apply to all rules, except the rules checked with Exclude from Update All. It is *recommended* when rolling over Hourly Entitlements with a maximum to use the Rollover Entitlement button.

Sick Entitlement Master

This function is used to manage Sick Entitlements. Rules are created to grant Sick Entitlements for employees in the organization. There are 3 basic functions performed.

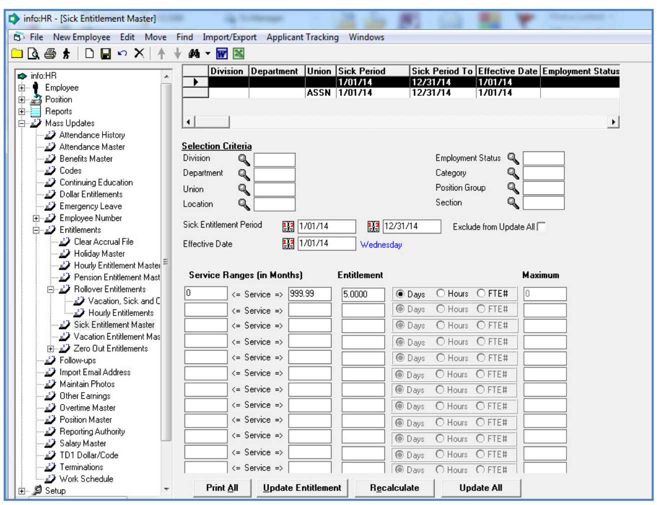
Creating Modifying and Deleting Rules

To add, change or delete rules you must use the action buttons in the top menu bar.



Buttons

Button	Purpose
New	To create a new rule, click the new record button
Modify	To modify a rule select the rule from the grid box. Make the changes required to the rule then clicking "**save"** saves the changes to the rule.
Delete	To delete a rule select the rule from the grid box then chick the delete button.



Information Validation

Field	Purpose
Grid Box	Provides the ability to view the Entitlement rules and select by clicking on the rule in the grid box.
Selection Criteria	When creating a Sick Entitlement rule it is important to ensure that the employees receiving the entitlement match the rule criteria. If the employee does not match the rule in some way they will not receive the entitlement upon update. **Example:** If a rule has the Employment Status

Field	Purpose
Selection Criteria Continued	of Active then only employees with a status of Active on the Status/Dates screen will receive the entitlement; an employee with a status of LOA will not receive the entitlement.
Division	Provides the ability to select a specific Division of employees the entitlement rule will apply to.
Department	Provides the ability to select a specific Department of employees the entitlement rule will apply to.
Union	Provides the ability to select a specific Union of employees the entitlement rule will apply to.
Location	Provides the ability to select a specific Location of employees the entitlement rule will apply to.
Employment Status	Provides the ability to select a specific Employment Status of employees the entitlement rule will apply to.
Category	Provides the ability to select a specific Category of employees the entitlement rule will apply to.
Position Group	Provides the ability to select a specific Position Group of employees the entitlement rule will apply to.
Section	Provides the ability to select a specific Section of employees the entitlement rule will apply to.
Sick Entitlement Period	Provides the ability to enter a date range the entitlement is valid for.
Effective Date	Provides the ability to enter the date the entitlement becomes effective.
Exclude from update All	Provide the ability to exclude rules which are not updated then the Update All button is selected. **Example:** An organization has 6 Sick Entitlement rules. 5 Rules are updated at the end of the Calendar Year. 1 Rule is updated at the end of the Fiscal Year. The rule that is to be updated at the end of the Fiscal should be checked with **Exclude from Update All** to ensure it is not updated in error with the other rules.
Service Ranges	Provides the ability to enter a range and the sick entitlement granted for the specific

Field	Purpose
	service range. Service Ranges are in Months.
Entitlement	Entitlement is the amount of time granted based on the service range. This is calculated based on Hours, Days or FTE#. **Note:** Employees **must** have hours per day, and FTE# in their Position screen for the sick entitlement to calculate properly.
Maximum	Provides the ability to put a maximum or a cap on the amount of sick entitlement granted.

Buttons

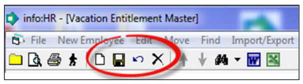
Button	Purpose
Print All	Provides the ability to generate and print a report of all sick entitlement rules.
Update Entitlement	Provides the ability to update employees' sick entitlement for the rule selected.
Recalculate	Provides the ability to recalculate all employee sick entitlements. When clicking this button the system performs the following calculation, (Previous + Current - Taken = Outstanding).
Update All	Provides the ability to update all employees' sick entitlements for each rule.

Vacation Entitlement Master

This function is used to manage Vacation Entitlements. Rules are created to grant Vacation Entitlements for employees in the organization. There are 3 basic functions performed.

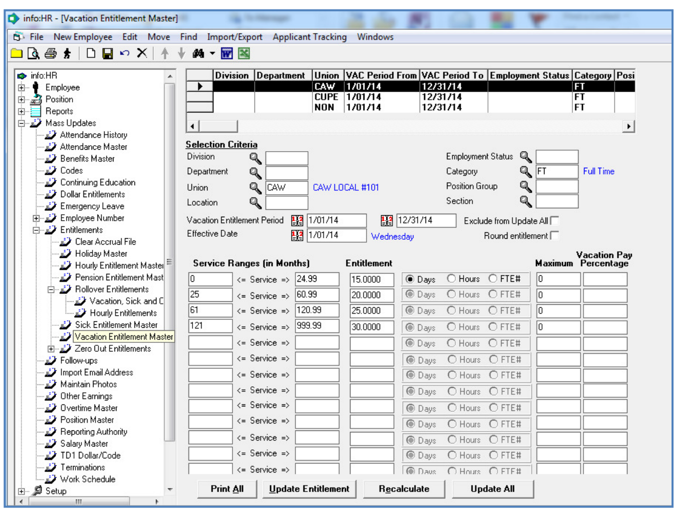
Creating Modifying and Deleting Rules

To add, change or delete rules you must use the action buttons in the top menu bar.



Buttons

Button	Purpose
New	To create a new rule, click the new record button
Modify	To modify a rule select the rule from the grid box. Make the changes required to the rule then clicking “**save”** saves the changes to the rule.
Delete	To delete a rule select the rule from the grid box then chick the delete button.



When creating a Vacation Entitlement rule it is important to ensure that the employees receiving the Vacation Entitlement match the rule criteria. If the employee does not match the rule in some way they will not receive the Vacation Entitlement upon update.

> **Example:** If a rule has the Employment Status of Active then only employees with a status of Active on the Status/Dates screen will receive the entitlement; an employee with a status of LOA will not receive the entitlement.

Information Validation

Field	Purpose
Grid Box	Provides the ability to view the Vacation Entitlement rules and select by clicking on the rule in the grid box.
Division	Provides the ability to select a specific Division of employees the entitlement rule will apply to.
Department	Provides the ability to select a specific Department of employees the entitlement rule will apply to.
Union	Provides the ability to select a specific Union of employees the entitlement rule will apply to.
Location	Provides the ability to select a specific Location of employees the entitlement rule will apply to.
Employment Status	Provides the ability to select a specific Employment Status of employees the entitlement rule will apply to.
Category	Provides the ability to select a specific Category of employees the entitlement rule will apply to.
Section	Provides the ability to select a specific Section of employees the entitlement rule will apply to.
Sick Entitlement Period	Provides the ability to enter a date range the entitlement is valid for
Effective Date	Provides the ability to enter the date the entitlement becomes effective.
Exclude from Update All	Provide the ability to exclude rules which are not updated then the Update All button is selected. **Example:** An organization has 6 Vacation Entitlement rules. 5 Rules are updated at the end of the Calendar Year. 1 Rule is updated at the end of the Fiscal Year. The rule which is to be updated at the end of the Fiscal should be check with **Exclude from Update All** to ensure it is not updated with the other rules in error.
Service Ranges	Provides the ability to enter a range and the vacation entitlement granted for the specific service range. Service Ranges are in Months.
Entitlement **Entitlement Continued**	Entitlement is the amount of time granted based on the service range. This is calculated based on Hours, Days or FTE#.

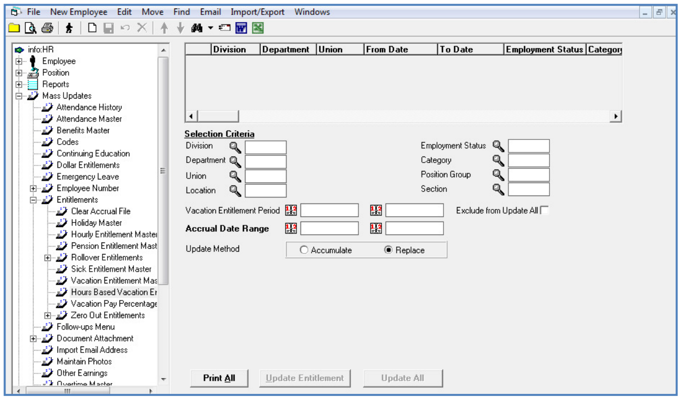
Field	Purpose
	Note: Employees **must** have hours per day, and FTE# in their Position screen for the sick entitlement to calculate properly.
Maximum	Provides the ability to put a maximum or a cap on the amount of vacation entitlement granted.

Buttons

Button	Purpose
Print All	Provides the ability to generate and print a report of all vacation entitlement rules.
Update Entitlement	Provides the ability to update employees' vacation entitlement for the rule selected.
Recalculate	Provides the ability to recalculate all employee vacation entitlements. When clicking this button the system perform the following calculation, (Previous + Current - Taken = Outstanding).
Update All	Provides the ability to update all employees' vacation entitlements for each rule.

Hours Based Vacation Entitlement

This function is used to manage Vacation Entitlements based on hours worked. Attendance records must be entered for vacation to be calculated.



When creating a Vacation Entitlement rule it is important to ensure that the employees receiving the Vacation Entitlement match the rule criteria. If employees do not match the rule in some way they will not receive the Vacation Entitlement upon update.

> **Example:** If a rule has the Employment Status of Active then only employees with a status of Active on the Status/Dates screen will receive the entitlement; an employee with a status of LOA will not receive the entitlement.

Prior to updating the rules all attendance records must be entered. If you are using Timesheets, all Timesheets for the period to be updated must be approved.

Selection Criteria

Field	Purpose
Grid Box	Provides the ability to view the Vacation Entitlement rules and select by clicking on the rule in the grid box.
Division	Provides the ability to select a specific Division of employees the entitlement rule will apply to.
Department	Provides the ability to select a specific Department of employees the entitlement rule will apply to.
Union	Provides the ability to select a specific Union of employees the entitlement rule will apply to.
Location	Provides the ability to select a specific Location of employees the entitlement rule will apply to.
Employment Status	Provides the ability to select a specific Employment Status of employees the entitlement rule will apply to.

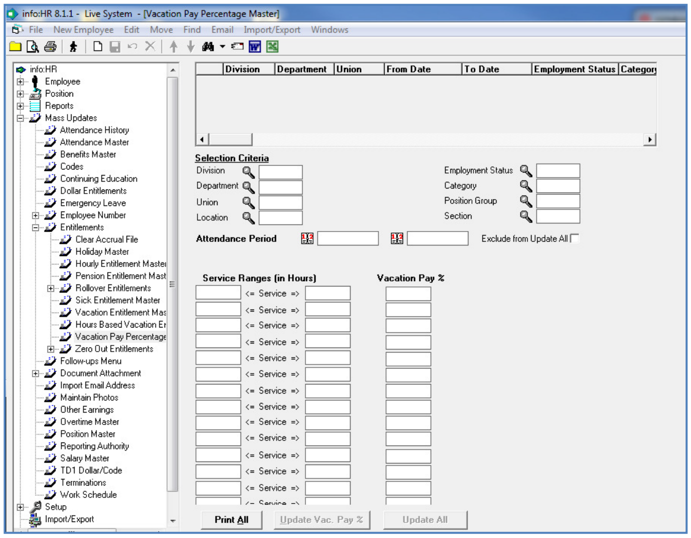
Field	Purpose
Category	Provides the ability to select a specific Category of employees the entitlement rule will apply to.
Section	Provides the ability to select a specific Section of employees the entitlement rule will apply to.
Vacation Entitlement Period	Provides the ability to enter a date range the entitlement is valid for.
Effective Date	Provides the ability to enter the date the entitlement becomes effective.
Exclude from Update All	Provide the ability to exclude rules which are not updated when the Update All button is selected. **Example:** An organization has 6 Vacation Entitlement rules. 5 Rules are updated at the end of the Calendar Year. 1 Rule is updated at the end of the Fiscal Year. The rule which is to be updated at the end of the Fiscal should be check with **Exclude from Update All** to ensure it is not updated with the other rules in error.
Update Method	Provides the ability to select weather the entitlement will **Accumulate** or be **Replaced** upon update. • Replace is checked by default. When updating, the Entitlement Amount calculated will replace the Hourly Entitlement's Current Year amount. • Accumulate option will use the Entitlement Amount calculated and add the amount to the Hourly Entitlement's Current Year amount.

Buttons

Button	Purpose
Print All	Provides the ability to generate and print a report of all vacation entitlement rules.
Update Entitlement	Provides the ability to update employees' vacation entitlement for the rule selected.
Update All	Provides the ability to update employees' vacation entitlements for all rules.

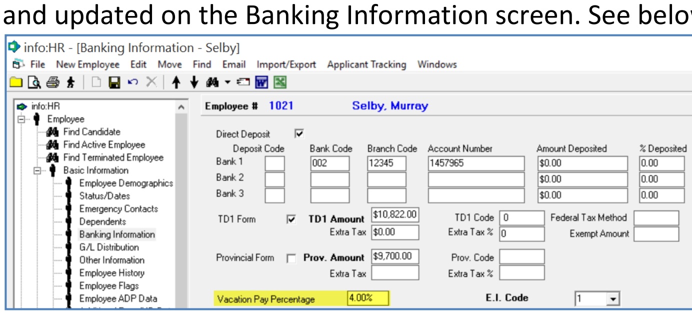
Vacation Pay Percentage

This function is used to manage the vacation pay percentage for employees based on hours worked.



Prior to updating the rules all attendance records must be entered. If you are using Timesheets, all Timesheets for the period to be updated must be approved.

- This function sums all attendance records, both current and historical, for employees matching the criteria. Only reasons with the Absent Flag not checked are included in this total.
- Based on the sum total number of hours, the “Vacation Pay %” is determined and updated on the Banking Information screen. See below:



Selection Criteria

Field	Purpose
Grid Box	Provides the ability to view the Vacation Entitlement rules and select by clicking on the rule in the grid box.
Division	Provides the ability to select a specific Division of employees the entitlement rule will apply to.
Department	Provides the ability to select a specific

Field	Purpose
	Department of employees the entitlement rule will apply to.
Union	Provides the ability to select a specific Union of employees the entitlement rule will apply to.
Location	Provides the ability to select a specific Location of employees the entitlement rule will apply to.
Employment Status	Provides the ability to select a specific Employment Status of employees the entitlement rule will apply to.
Category	Provides the ability to select a specific Category of employees the entitlement rule will apply to.
Section	Provides the ability to select a specific Section of employees the entitlement rule will apply to.
Attendance Period	Provides the ability to enter a date range the entitlement is valid for.
Service Range	Provides the ability to enter a range and the vacation entitlement granted for the specific service range. Service Ranges are in hours.
Vacation Pay %	Provides the ability to enter a vacation pay percentage.

Buttons

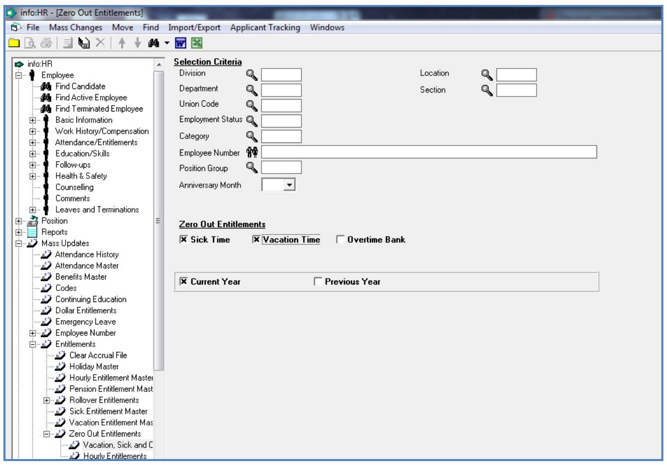
Button	Purpose
Print All	Provides the ability to generate and print a report of all vacation percentage rules.
Update Vac. Pay%	Provides the ability to update employees' vacation percentage for the rule selected.
Update All	Provides the ability to update employees' vacation percentage for all rules.

Zero Out Entitlements

The Zero Out Entitlements menu is typically used as part of your yearend process, however depending on your company policies it may be necessary to complete a zero out on a monthly basis.

Vacation, Sick and Overtime

When using this function you are able zero out the either current or previous year balances of Vacation, Sick and Overtime. Use the mass update ( ) icon in the toolbar to update.



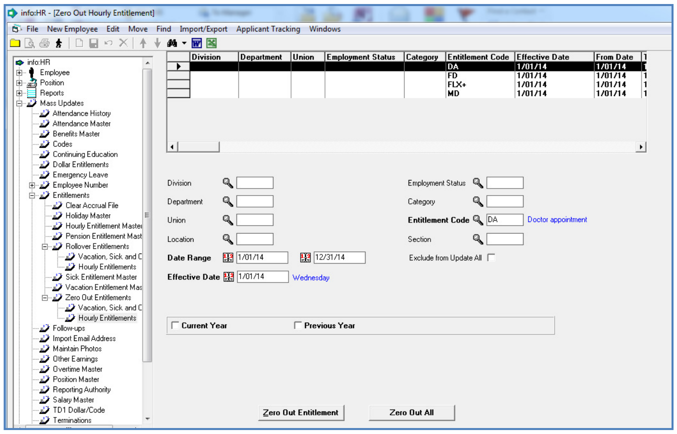
Selection Criteria

Field	Purpose
Division	Provides the ability to select a specific Division of employees whose entitlements will be zeroed out.
Location	Provides the ability to select a specific Location of employees whose entitlements will be zeroed out.
Department	Provides the ability to select a specific Department of employees whose entitlements will be zeroed out.
Section	Provides the ability to select a specific Section of employees whose entitlements will be zeroed out.
Union Code	Provides the ability to select a specific Union of employees whose entitlements will be zeroed out.
Employment Status	Provides the ability to select a specific Employment Status of employees whose entitlements will be zeroed out.
Category	Provides the ability to select a specific Category of employees whose entitlements will be zeroed out.

Field	Purpose
Employee number	Provides the ability to select by employee number the employees whose entitlements will be zeroed out.
Position Group	Provides the ability to select a specific Position Group of employees whose entitlements will be zeroed out.
Month	Provides the ability to select the anniversary month to be rolled over. This is typically used when completing a monthly zero out.
Sick Time	When checked the sick time will be zeroed out. If left unchecked the balance will not be affected.
Vacation Time	When checked the vacation time will be zeroed out. If left unchecked the balance will not be affected
Overtime Bank	When checked the overtime bank will be zeroed out. If left unchecked the balance will not be affected.
Current Year	When checked the Current Year's Entitlement will be zeroed out.
Previous Year	When checked the Previous Year's Entitlement will be zeroed out. ******Please call Support for assistance when completing a Previous Year Zero Out***.

Hourly Entitlements

When using this function you are able zero out the current balances of Hourly Entitlements.



Grid Box – Displays the Hourly entitlement rules. To select a rule click on the rule, the criteria for the rule selected will display below.

To zero out the Hourly Entitlements select the rule from the grid box.

Current Year – When checked the Current Year's Entitlement will be zeroed out.
Previous Year – When checked the Previous Year's Entitlement will be zeroed out.

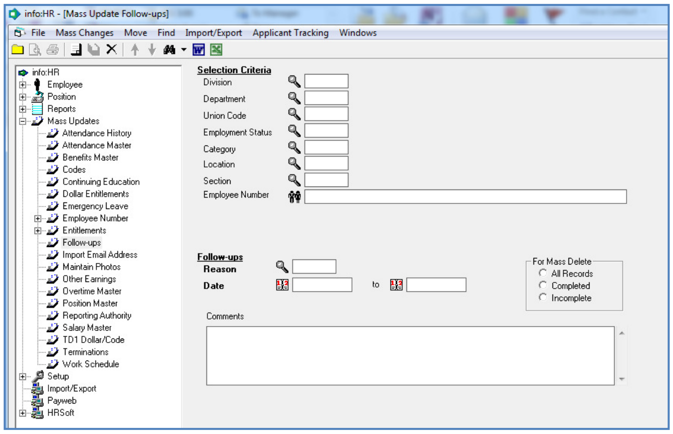
******Please call Support for assistance when completing a Previous Year Zero Out***.

Buttons

Button	Purpose
Zero Out Entitlement	Provides the ability to zero out only the entitlement selected.
Zero Out All	Provides the ability to zero out all entitlements. **Note**: When clicking on Zero Out All, if there is a value in this will apply to all rules, except the rules check with Exclude from Update All.

Follow-ups

Use this function to add or delete Follow-up records for a group of specified employees. Updates are performed by clicking on the appropriate icon in the toolbar. To add Follow-Ups, click on the Mass Add ( ) icon. For deleting Follow-Ups use the ( ).



Selection Criteria

Field	Purpose
Reason	Provides the ability to select a follow up reason code.
Date	Provides the ability to select a date range of when the follow ups are due.
For Mass Delete	Provides the ability to delete specific follow up records **Example:** If you would like to delete All follow-up records check the All Records. If you only want to delete follow-ups that have been marked as completed, select Completed.

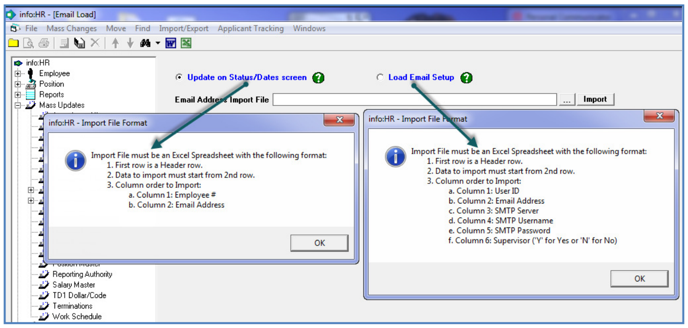
Error messages

Error # 3075

This error occurs when you enter an apostrophe in the *Comments* area. Click *No* – do not continue. Re-enter the *Mass Changes* function and re-enter the *Follow-up* record omitting the apostrophe in the *Comments*.

Import Email Address

Use this function to load Email addresses in info:HR. Email addresses are stored in two places, the **Status/Dates** screen and the **Email Setup** screen.



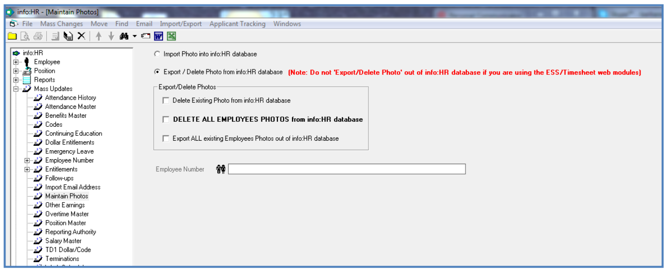
- **Status/Dates screen** – Email addresses on this screen are used whenever you want to send an email to the employee using the email icon () on the toolbar.
- **Email Setup screen** – Email addresses on this screen are used by ESS and Timesheets.

To Mass Update Email Address, an Excel spreadsheet must be created using a format dependent upon which email address is being updated. Clicking on the question mark () beside the email address being updated will display the file layout.

Once the spreadsheet has been created use the browse button (); simply select the appropriate file to be updated. Import the file using the (Import) button, and then click the Mass Update button. ().

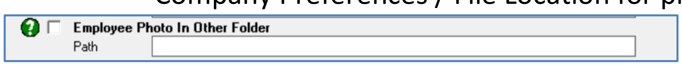
Maintain Photos

Use this function to Add, Replace, or Delete employee photos. These photos will display on the Employee Demographics screen. When saving the images it is recommended to save the image with a file name equal to the employee number. *Note that photos must be in .jpg format.*

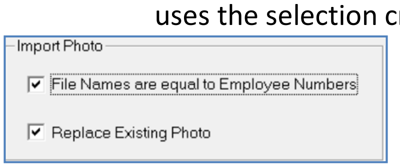


During the conversion from v7.9 to v8.0, an option was provided to export employee photos from the info:HR database and move the photos to a folder on the server. If this option was **not** selected during the conversion, the above facility provides the ability to delete or export employee photos.

- **Import Photo into info:HR database** – This option provides the ability to import employee photos into the info:HR database. This option is only active when the Company Preferences / File Location for photos is unchecked.



- When importing photos, the application follows the v7.9 program logic that uses the selection criteria displayed:



Export/Delete Photo from info:HR database options:
Selection Criteria

Field	**Purpose**
Delete Existing Photo from info:HR database	This option will delete a specific employee picture based upon the Employee Number(s) entered in the selection box below. Click on the delete (☒) icon to remove that employee's photo.
Delete ALL EMPLOYEE PHOTOS from info:HR database	Caution: This option deletes ALL photos from the info:HR database. If checked and updated, the photos are physically deleted from the database and would need a database restore to get the pictures back. Click on the delete (☒) icon to remove all photos.

Field	Purpose
Export ALL existing Employee Photos out of info:HR database	This option copies all employee photos from the info:HR database to the path selected across from Export to Path. The employee photos are not deleted from the database. 

Selection Criteria

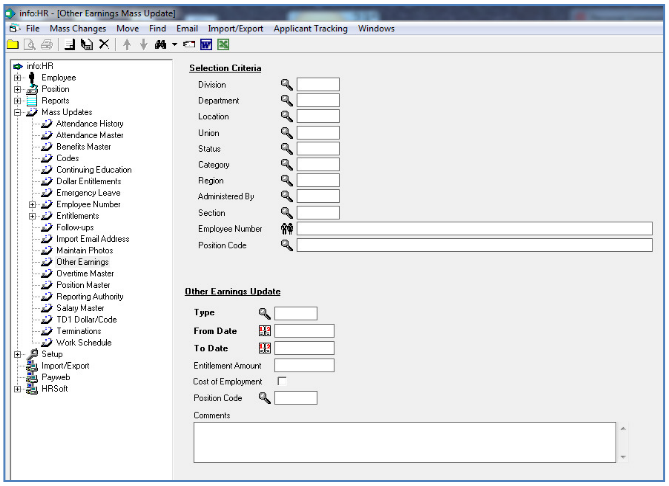
Field	Purpose
File Names are equal To Employee Numbers	Provides the ability to import more than one photo. The photo must be saved as the employee number.
Replace Existing Photo	Will import the new photo and automatically delete the old photo. • Use the mass update ( ) icon in the toolbar to process the request.
	Will delete the current photo. • Use the mass delete ( ) icon in the toolbar to process the request.

To add an individual photo, unselect *File Names are equal to Employee Number*. Select the employee or enter the employee number. Then browse for the saved photo.

- Use the mass update ( ) icon in the toolbar to process the request.

Other Earnings

This function is used to update and maintain Other Earnings such as commissions and bonuses. This is typically completed on a quarterly or annual basis. The icons in the toolbar are used to add, update or delete based on the selection criteria entered.

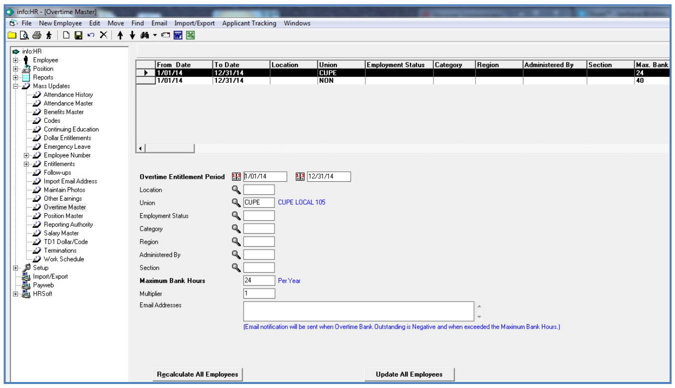


Selection Criteria

Field	Purpose
Type	Provides the ability to select an earning type code.
From Date	Provides the ability to enter a date the earnings began.
To Date	Provides the ability to enter a date on when the earnings ended.
Entitlement Amount	Provides the ability to enter the dollar amount of the earnings.
Cost of Employment	Provides the ability to enter the earnings as a cost of employment.
Comments	Provides the ability to enter a comment to the record.

Overtime Master

This function is use to maintain the overtime banks. This is used on an annual basis to assign an Overtime Bank to a desired group of employees. Employees may then log overtime against a bank and draw on that bank of time later.



Selection Criteria

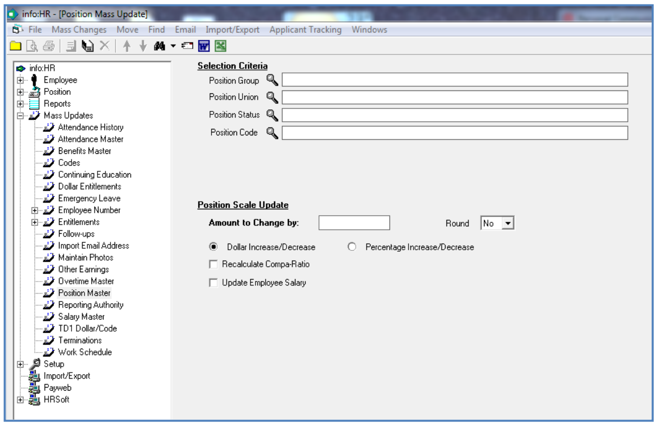
Field	Purpose
Overtime Entitlement Period	Provides the ability to set up overtime banks for a specific period.
Location, Union, Employment Status, Category, Region, Administered By, and Section	Location, Union, Employment Status, Category, Region, Admin By, and Section provide the ability to select groups of employees who the overtime bank will apply to.
Maximum Bank Hours	Provides the ability to set a maximum number of overtime hours for the year.
Multiplier	Provides the ability to enter a value to multiply the overtime by. **Example:** if your organization allows employees to bank overtime and the value of one overtime hour is equal to 1.5 hours of regular time you would enter 1.5 as your multiplier.
Email Address	Provides the ability to enter email address to send notification if employees exceed their maximum hours or if the outstanding balance goes into the negative.

Buttons

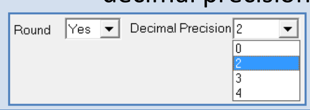
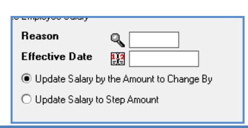
Button	Purpose
Recalculate All Employees	Provides the ability to recalculate the outstanding overtime bank of all employees.
Update All Employees	Provides the ability to update all employees current or new overtime banks.

Position Master

This function is use to maintain the position's salary steps. Based on the criteria entered, the Position Master's steps are updated either by a dollar amount or by a percentage.



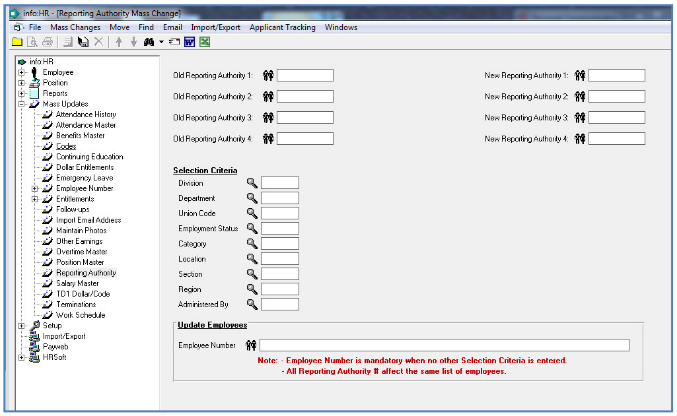
Selection Criteria

Field	**Purpose**
Round	Provides the ability to round the increase or decrease based on the decimal precision selected. 
Amount to Change By	Provides the ability to enter either a dollar amount or a percentage of change.
Dollar Increase/Decrease	Identifies that the *Amount to Change by* is a dollar change.
Percentage Increase/Decrease	Identifies that the *Amount to Change by* is a percent change.
Recalculate Compa Ratio	Recalculates the employee's current *Compa Ratio* based on the revised salary steps.
Update Employee Salary	When checked, provides the ability to update all employees' salaries with the increase. This saves the user from having to do a separate mass update of employees' salaries. **Note:** When selecting *Update Employee Salary*, criteria will be displayed that requires completion prior to the mass update proceeding. 
Reason	Provides the ability to enter a Change of Salary code.

Field	Purpose
Effective Date	Provides the ability to enter a Salary Effective Date.
Update Salary By the Amount to Change By	When checked will adjust the salary by the amount entered above.
Update Salary to Step Amount	When checked will update the salary to the grid step entered for the employee.

Reporting Authority

This function is used to change employees' reporting authority. The program replaces Reporting Authority 1 through 4 based on what reporting authority numbers are entered for the list of selected employees. The old reporting authority numbers are overridden and no history of the change is kept.



To replace the Reporting Authority regardless of the "Old Reporting Authority"

- Enter a new Reporting Authority Employee Number.
- Enter the Selection Criteria and/or select employees under the Update Employees lookup.
- Click on the Mass Update to replace the Reporting Authority of the selected employees to the New Reporting Authority.

To replace the "Old Reporting Authority" with a "New Reporting Authority".

- Enter an Old Reporting Authority Employee Number.
- Enter a New Reporting Authority Employee Number.
- Enter the Selection Criteria and/or select employees under the Update Employees lookup.
- Click on the Mass Update to change the Reporting Authority of the selected employees to the New Reporting Authority. If the employee's Old Reporting Number doesn't match what is entered on the screen, the employee's Reporting Authority will not change.

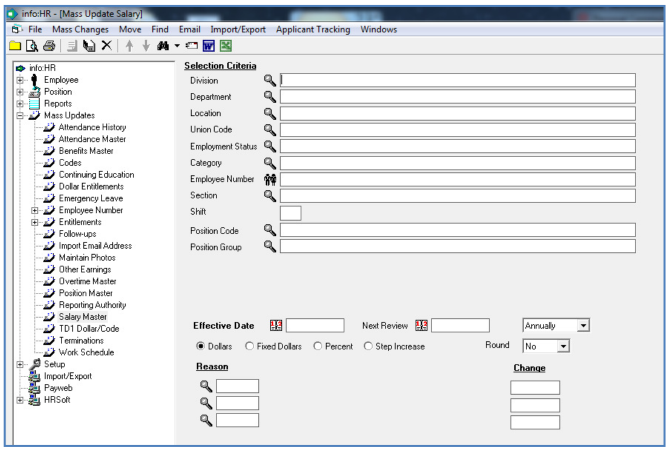
Selection Criteria

Field	Purpose
Reporting Authority 1	Provides the ability to enter the new direct supervisor's employee number.
Reporting Authority 2	Provides the ability to enter the next level report authority according to the organization structure.
Reporting Authority 3	Provides the ability to enter the next level report authority according to the organization structure.
Reporting Authority 4	Provides the ability to enter the next level report authority according to the organization structure.

Field	Purpose
Selection Criteria	Provides the ability to select groups of employees to be updated.
Update Employees	Provides the ability to enter or select the employees affected by the change. By using the SHIFT or CTLS keys in the employee lookup, multiple employees can be selected.

Salary Master

Use this function to maintain employee Salary information for a specified group of employees. This is typically used if you are updating salaries post-review and independently of the grid steps set up in the Position Master. If an increase is the result of a realignment of the Position's grid steps, it is recommended to use the Position Master to update the Position grid steps and the employees within a single mass update function.



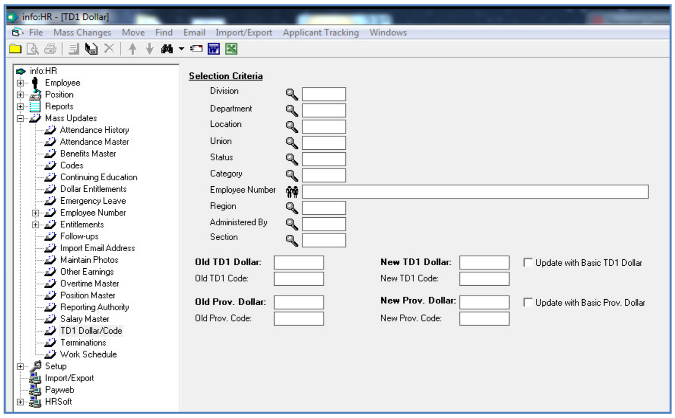
Selection Criteria

Field	Purpose
Selection Criteria	Provided the ability to select the group of employees who are receiving an increase.
Effective Date	Provides the ability to enter the date which the change becomes effective. Any employee whose current salary's effective date is greater than the date entered will not be updated by this mass update function.
Next Review	Provides the ability to enter in the next date the salary will be reviewed; the system will create a follow up record for this date.
Drop Down	Provide the ability to select Annually, Hourly, or Daily; this is the time increment associated with the change. Any employee whose **Per** does not equal the item selected in the drop down list will not be updated by this mass update function. Depending on the selection below, the **Reason** and **Change** columns are different. **Example:** if you select Step Increase, the Change column drop down will list the Steps available. If you select Fixed Dollars only one **Reason Code** and **Change** can be entered.
Dollars	Provides the ability to enter a dollar increase

Field	Purpose
	per the time increment selected. If entering a decrease amount, the **Change** must have a (-) in front of the number. The **Dollar** amount will be added to the employee's current salary.
Fixed Dollars	Provides the ability to enter a fixed dollar amount. Employees matching the selection criteria will have their current salary changed to the **Fixed Dollar** amount.
Percentage	Provides the ability to enter a percentage increase based on the time increment selected. The **Percent** amount will be added to the employee's current salary.
Step Increase	Provides the ability to enter a step change. Employees matching the criteria will move to the **Step** selected in the drop down list.
Round	Provides the ability to round the change to the selected decimal precision. This is used when choosing a **Percent** change.
Reason	Provides the ability to enter a reason code(s) associated with the change.
Change	Provides the ability to enter the change amount.

TD1 Dollar/Code

Use this screen to change the TD1 and Provincial Dollar Codes for a group of employees identified in the Selection Criteria. This is usually done as a part of the year end procedure. The employee's TD1 and Provincial amounts are changed on the Banking Information screen. However to ensure the new TD1 and Provincial tax amounts are applied to new hires, the Company Master (under the Setup Menu) must be updated with the current TD1 and Provincial amounts.



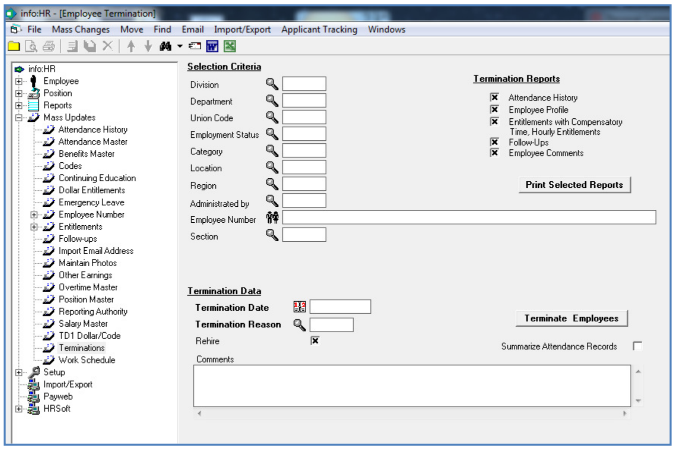
Selection Criteria

Field	Purpose
Old TD1 Dollar	Provides the ability to enter the old TD1 Dollar amount. If an amount is entered in this field the system will change only the records which match this dollar amount entered.
New TD1 Dollar	Provides the ability to enter the new TD1 Dollar amount. **Example:** If you have an employee who has the basic amount of 11,038 and an employee who has an amount of 12,685 in the system and you enter the old amount as 11,038, only the employees with 11,038 will be updated.
Old TD1	This function is no longer used by payroll.
New TD Code	This function is no longer used by payroll.
Update with Basic TD1 Dollar	When this option is checked the system will update all employees with the new basic amount. Any employee who has a different exemption amount will need to be updated manually.
Old Prov Dollar	Provides the ability to enter the old Provincial Dollar amount. If an amount is entered in this field the system will change only the records which match this dollar amount entered.

Field	Purpose
New Prov Dollar	Provides the ability to enter the new Provincial Dollar amount.
Old Prov. Code	This function is no longer used by payroll.
New Prov Code	This function is no longer used by payroll.
Update with Basic Prov. Dollar	When this option is checked the system will update all employees with the new basic amount. Any employee who has a different exemption amount will need to be updated manually.

Terminations

Use this screen to complete terminations for a group of employees based upon the selection criteria entered. It can be used when performing mass permanent layoff or right-sizing. All employees will be assigned the same termination date and reason.



Selection Criteria

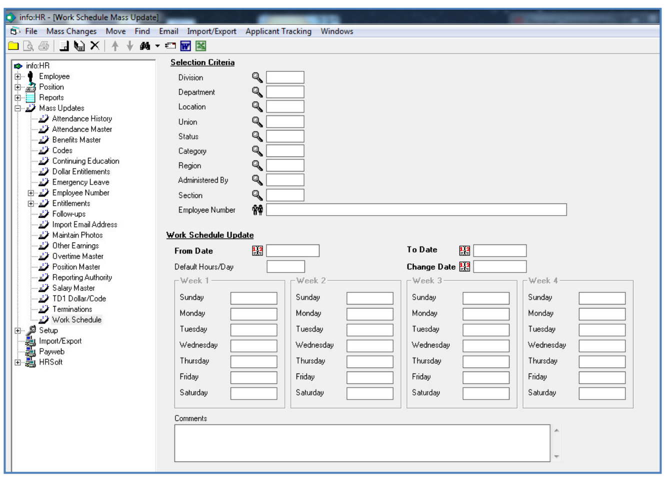
Field	Purpose
Termination Reports	Provides the ability to select which reports will be printed upon termination. Click on the report name to check/uncheck the report.
Print Selected Reports	Click to print selected reports for each employee being terminated. Depending upon the number of employees in the selection criteria, a large number of pages could be sent to the printer. Make sure all reports are printed before proceeding with the termination step.
Termination Date	Provides the ability to enter a termination date.
Termination Reason	Provides the ability to enter a reason code.
Rehire	Provides the ability to check of you would like to rehire the employees being terminated.
Summarize Attendance Rerecords	This option should **not** be checked. If checked, the system summarizes the attendance records by Year/Reason. All daily attendance history is lost.
Comments	Provides the ability to enter comments
Terminate Employee	Clicking this button processes the termination and moves the employees to the Terminated Employee List.

Work Schedule

Use this function to add, change or delete Work Schedule records for a group of specified employees. Updates are performed by clicking on the appropriate icon in the toolbar. To add a Work Schedule, click on the add ( ) icon. Modifying employees' existing Work Schedule uses the change ( ) icon and deleting Work Schedules use the delete ( ) icon.

To change or delete a work schedule, the **From Date** and **To Dates** must match the employee's Work Schedule. Delete Work Schedule physically deletes the Work Schedule from the employees who match the selection criteria. Caution is advised if using the change and delete option. *All unapproved ESS requests should be approved before changing employee's Work Scheduled otherwise, ESS will not handle the outstanding requests properly*.

Work Schedule logic is used in the Employee Self Serve module based upon the Work Schedule Rules created under the Setup menu. Refer to the Setup Menu User Guide for more details on this function. In Timesheets, the employee's Work Schedule is displayed under the 'day' column.



Selection Criteria

Field	Purpose
From Date	Provides the ability to enter a beginning date for the schedule.
To Date	Provides the ability to enter an end date for the schedule.
Change Date	Provides the ability to enter a date that the Work Schedule was changed.
Default Hours Day	Provides the ability to enter the employee's hours per day. This number will be copied into each day of week listed below.
Days of Week	Provides the ability to enter the actual hours for each day of the scheduled week.