Advanced Tracker Technologies Inc.

Positional Rate Achievements

Overview

This document describes the ability to post date-sensitive rates. These rates start with the hire date of an employee and are defined in a move-forward basis, typically incurring a pay raise every 12 months.

Notes

Any reference to menu items within Employee Tracker assumes that the user is logged into the software with a properly privileged account.

Items laid out in this document have been deemed mandatory and failure to follow any of the steps mentioned will not allow for the modifications to work as expected.

The software makes no reparations for incorrect use.

The Policy

This policy is activated via the menu Utilities->Policies. Select the category "Rates" from the left, and double click the policy titled "Positional Rate Achievements" to toggle on or off.

Pay Rate Tables

The pay rate tables are to be defined as "piece rates". Go to the menu Setup->Special->Define Piece Rates. Let's follow an example definition:

Click the [Add] button.
Enter a code "001" and description of "Server". Take note that these two fields can be entered as the customer wishes. These are for example sakes only. We want to define a piece-rate table where the first 3 months are paid at $8.91 per hour. The remainder of the first year bumps up to $9.27. The second year (months 12-23) pay at $10.08, etc.

The lower half of the screen is where we define our pay rates.

Click the lower-left [Add] button. Enter "0" in the from column, "2" in the To column, and "8.91" in the rate column. Press [Enter] to commit the entry. You may observe a message in red to the right of the rate definition table, "***Does Not Start At 1!!***" We can ignore this message because we don't want the table starting at 1; we need it to start at 0.

Click [Add] and enter the rest of these values:

- From: "3" To: "11" Rate: "9.27"
- From: "12" To: "23" Rate: "9.79"
- From: "24" To: "35" Rate: "10.08"
- From: "36" To: "47" Rate: "10.38
- From: "48" To:"59" Rate: "10.69"
- From: "60" To: "71" Rate: "11.01"

This gives us rates for the first 6 years.

A quick note on entry of this table; When the [Add] or [Edit] button is pressed, three fields are presented for data entry; "From", "To" and "Rate". To move between the three fields, use the [Tab] key. Once you have entered the information line as expected, ensure you press [Enter] to commit the changes. Clicking outside the three entry boxes will cancel the changes.

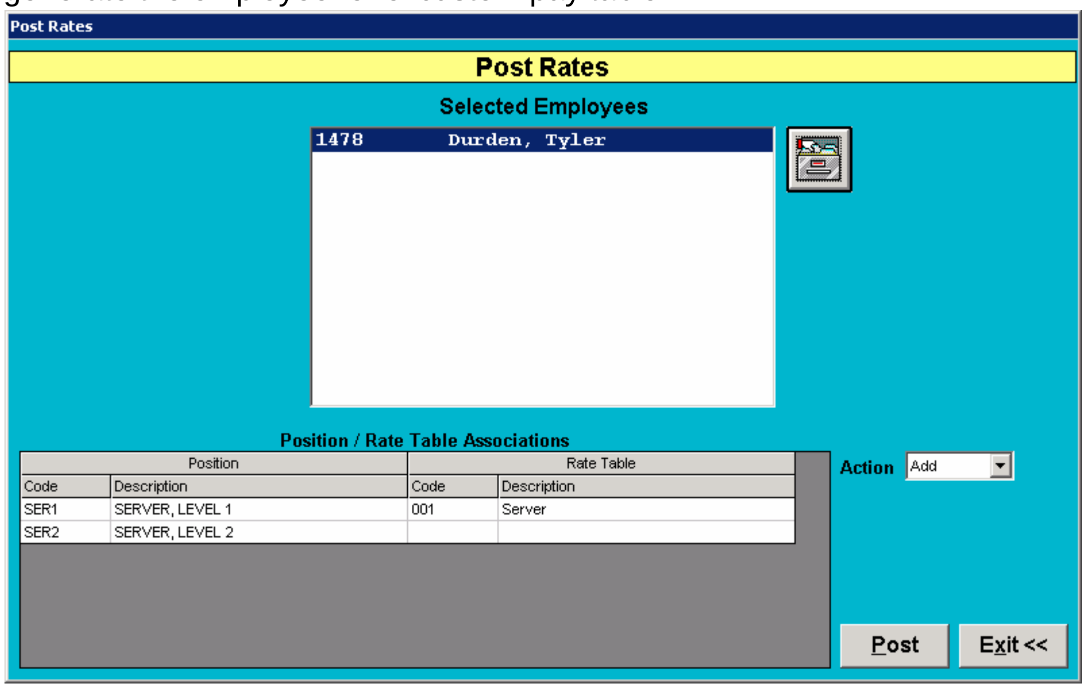
From	To	Rate
0	2	8.91
3	11	9.27
12	23	9.79
24	35	10.08
36	47	10.38
48	59	10.69
60	71	11.01

To the left we can see what the completed table will look like when entered as described above.

Repeat this procedure for all the different rate tables. Note that a single rate table may apply to more than one position, reducing the total number of tables to be defined. When future years roll around, an additional line can be amended to the rate tables, and as we'll see, these rate tables can be posted to the employees to generate their specific pay increase tables.

Posting

Now that the rate tables have been defined, we can proceed to post these tables to the employees to generate the employee-level custom pay table.



Go to the menu Operations->Post Rates (attiCu18).

The upper section of the window allows for the selection of which employees are going to be posted to. Use the specification buckets button to the right of the "Selected Employees" list to filter your employees.

The next procedure will be to work your way down the grid in the lower-left section of the screen, associating one of the pay tables we defined above with the positions setup within Employee Tracker. This is a one-to-one relationship, but the same rate table can be associated with multiple positions. Once these relationships have been setup, they will be saved to the database and should not have to be changed, unless a new position is added to the system.

The last section on this window is the action. There are two possibilities, Overwrite or Add. When Overwrite is selected, all existing rate information for a particular employee/position relationship will be deleted and completely replaced with the details from the rate table. When Add is selected, a comparison between the defined pay rate table and existing rate information is performed. If it is determined that modifications to existing pay-rate information for a particular employee/position, this relationship is tagged as non-standard, and these non-standard employees are reported. These reported non-standard relationships must be dealt with on an individual, manual basis. If no deviance from the pay-rate table is found, new items will be added to the existing rates.

Once all that is setup, clicking the [Post] button will begin the operation. The simple logic behind the posting is to take an employee's hire date, and create date-sensitive rate increase information for each position that an employee is setup to work in. Although the hire date is a mandatory field for this operation, it is possible to have new employees without a hire date via external import facilities. Any employees who have no hire date, but are selected for this rate posting will appear in a message after posting is complete.

Let's imagine what a rate posting would look like using our sample rate table described above in the "Pay Rate Tables" section.

Given an employee who was hired on July 6, 2001, the posted rate table would generate rate effective information as follows:

- 07/06/2001, $8.91
- 10/06/2001, $9.27
- 07/06/2002, $9.79
- 07/06/2003, $10.08
- 07/06/2004, $10.38
- 07/06/2005, $10.69
- 07/06/2005, $11.01

These details are found by going to the employee profile (Setup->Employees, select an employee and click [Edit]). In the upper-left section, locate and click the "Position" category. Here will be listed all available positions. Highlight a position and click the [Details] button. The "Rate History" tab will show the posted rates for this employee/position relationship. Any alterations to the employees rate can be made here as well. This includes any disciplinary adjustments to the rate achievements.

Rate Analysis

With all these rates posted, the ability to generate a hardcopy of the results for future reference is achieved via the menu Reports->Employee Rate Analysis. Here we can select our employees to report on via the specification buckets (the filing cabinet button). There are many features available from this report, but for the simplest report showing the breakdown of each employee's position rate details, first choose "Rates As Of…", and then select "Full Positional Rate History Details". Make sure you put in a Rate Check Date, and select to sort by employee code or name. Now you can choose to [Preview] or [Print] the

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	Full Positional Rate History:		
	Position [SER1]	07/06/2001	@ 8.91
		10/06/2001	@ 9.27
		07/06/2002	@ 9.79
		07/06/2003	@ 10.08
		07/06/2004	@ 10.38
		07/06/2005	@ 10.69
		07/06/2006	@ 11.01

Rate Analysis. A sample of the results for our example employee is displayed above.

Yearly Maintenance

On a yearly basis, when new rates have been determined for each pay-rate table, do the following:

1. Edit each “Piece Rate” entry, adding the new step to the end of the table. (E.g. From 72 to 83 @ $11.88)
2. Go to the Post Rates function and re-post the rates for all the employees using the “Add” action. This will add the new rate information to each employee’s positional rate tables.

Exceptional Employees

Employees who do not follow the pay-rate tables, either because their dollar values or their schedules are different from the norm, need to be excluded from the Post function. Their individual rates must be defined in the employees’ positional rate history.

Rate Sourcing

With all this information now posted to the employees, we want to make sure that transactions are getting paid via the positional rates. Under the menu Utilities->Customize Software, click on the “General” tab. In the upper-right section, observe the “Rate Source” setting. This should read “Take positional if applied”.

Further, each employee can have overrides to this system default. Under the menu Setup->Employee, highlight an employee and click the [Edit] button. In the upper-left section, locate and click on “Rate History”. Here was can define how this particular employee gets rated. Ensure the “Rate Source” field reads “Use System Default”. This will force this employee to use the rate source defined under “Customize Software”, which should now be set to take the position rate.