

Advanced Tracker Technologies Inc.

Production Bonus

Overview

This document outlines the setup and operation of the “Production Bonus” modification for Employee Tracker.

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.

Setup

Activation of this policy occurs under the menu Utilities->Policies. Select the 'Custom' category from the left, and double click the policy titled "Production Bonus" to toggle policy on or off.

The Employee

First, an employee will be used for tracking of the achievements on a week-by-week basis. Go to Setup->Employees and click the [Add] button. Fill in the "Information"; employee code of PRODBONUS, badge code of NB and a report name of "Production Bonus".

Once these elements are filled in, click on the "Defaults" category in the top-left of the employee profile screen. Double-click on the box beside SUPERVISOR, which will change the entry to YES. Now click the [Exit] button in the lower right.

Security

Now we will secure the bonus-tracking employee. Go to the menu Utilities->Security. We'll want to edit each defined security profile, to either allow or restrict visibility of the PRODBONUS employee. Select a user and click the [Edit] button.

On the "Employee" tab, there will be a list labeled "Supervisor" Using the "Add/Remove" button, either add or remove the supervisor PRODBONUS. The person responsible for addition of the production achievements on a weekly basis, as well as the person responsible for payroll is a minimum of who requires visibility.

Pro-Rate Formula

Now to define the pro-rate formula. Under the menu Setup->Special->Pro-Rate Formulas, click the [Add] button. Define the formula as follows:

Code "BONUS" and description "Production Bonus".

On the left, select the types of paid hours which will be used in the pro-rate formula. The specific absent codes will be included in the scheme later.

On the right, make the sentence read: "Gather hours from '28' previous days. Divide those hours by '168'. Click the [Save] button to save the formula.

Achievements

Next we need a table of the achievements. Go to menu Setup->Special->Define Piece Rates. Click the [Add] button.

Code "BONUS" and description "Production Bonus".

On the left, define the piece range as follows:

- From 7000 to 7249 @ 1
- From 7250 to 7499 @ 1.5
- From 7500 to 7749 @ 2
- From 7750 to 7999 @ 3
- From 8000 to 99999 @ 4.5

You'll notice a warning to the right that the range does not start at zero. For our purposes, this is ignored.

Enter the earning code of PBONUS, then click the [Save] button.

Now we need to assign the achievement table to our PRODBONUS employee. Under the menu Setup->Special->Assign Piece Rates, select only our PRODBONUS employee, click on the "BONUS" piece rate definition, then click the [Run] button. This employee is now ready for maintaining the bonus details.

Options

Now the final setup step. Under the menu Utilities->CU16 – Custom Options (Production Bonus) allows for selection of absent codes applicable as paid hours, and the remaining elements defined above: employee, pro-rate formula, and piece rate. Click [Ok] when finished.

Operation

Weekly Achievement

On a weekly basis, the production achievements will be entered as a piece transaction against our bonus employee. Under the menu Operations->Edit Time and Attendance, choose the current pay period and the PRODBONUS employee. Make sure that "Piece" is selected as a record type in the top-right. Click the [Add] button and select "Piece".

Select the Piece Type BONUS, and enter the weekly bonus as Pieces (7000, 7250, 7500, 7750, or 8000). Notice the rate adjusts to our payout.

Payroll

With this transaction in place, a payroll export run (Operations->Payroll Export Run) will automatically take the rate of the piece record as the achievement to pro-rate an employees' bonus for the 4 weeks preceding the payroll period end date. Each employee selected in the payroll run will have an adjusted earning code at their current default positional rate. The code used will be the same as defined within the Piece Rate definition above.

Ensure this new earning code is setup on the payroll side as well.

Reports

Reporting of the piece payouts is possible through Reports->Time Analysis->Time And Attendance Transactions. Choose only our PRODBONUS employee, select the report type "Time Transaction Analysis" and un-check any of the sub-types. Select only PIECE as the record type and turn on "Include dollars". Our generated report will show "Shift Date" as our period end date, pieces for the achievement and the rate column will show the payout.

Conclusion

These specific requirements are above a base installation of Employee Tracker. The listed files contain modifications pertinent to the work detailed.