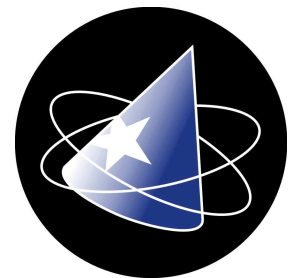


How To Guide...

Global Updating.... Pay Scales & Pay History

**Wiztec Business Suite
& WizHR 5**



Globally Updating Pay Scales & Pay History

This document outlines how to globally update employees where your company uses Pay Scales.

What is a Global Update?

GlobalUp allows you to update all or a number of employee records at the same time. A Wizard is used to update the pay scales/grades global update is then used to update employee pay records to reflect the new grade pay amounts.

The GlobalUp button **in the Pay Details screen acts as Pay Increase Wizard.**

Prior to running the Global Update, check that you have the Company and Company pay scales option available to you on the menu bar.

Note: if Company or the Company Pay Scales option is not available to you, contact the administrators of WBS/WizHR to grant you rights or ask the administrator to run this procedure.

1. Backing up the database

1.1 Backup

- It is strongly recommended that a backup be made of the database prior to the pay wizard being run
- Ensure that all users have exited WBS/WBS

Either: -

- a) Ask a member of the IT Department to carry out the back up or
- b) Follow the steps below

Performing a Backup

1. Ensure that all users have shut down the Wiztec Diary Monitor¹
2. Navigate to <\\servername\Wizapps\WizTime\Database> (for WBS) or to <\\servername\Wizapps\WizHR\Database>²
3. Copy the entire folder (and sub folders) to another location on the server
4. If you are having difficulty finding the database folder or in copying it ask your department to back up the file for you.

¹ See Section 4.1 on shutting down the Wiztec Diary Monitor

² If you are unsure of the location of the databases, click on **Start > Run >** Key in **person.ini** (if you are using WizHR) or **wizwork.ini** (if you are using Wiztec Business Suite) > click on **OK**. The line relating to the **Global System Directory**, will indicate the location of the database folder (i.e. ignore the last part of the path ...global)

2. Pay Scales Wizard



Introduction

An individual or all pay scales may increase with time. Increasing the Pay Scales in WBS/WizHR is a two-step process: -

- Increasing the Pay Scales in the Company Pay Scales screen (Section 2 of this document)
- Increasing the Pay Amount for each employee on the Pay Scale(s) (Section 3 of this document)

2.1 Updating Pay Scales

- Click on **Company** (menu bar)
- Click on **Company Pay Scales**
- Click on the **Wizard** button (sub screen toolbar)
- Select one of the three options available

a. Increase Current Scale

This will increase the salary scale that is currently opened on the Details tab behind the **Auto Increase** dialog box. This will increase the value for one pay scale only.

- Select **Increase Current Scale** radio button
- Key in the percentage to increase the scale by
- Select **With Rounding** or **Without Rounding** from the Rounding drop down list (*see the example below on rounding differences*)
- Click on **OK**
- The current pay scale will be updated immediately

The screenshot shows the 'Auto Increase By' dialog box with the following elements and annotations:

- 1**: A red box highlights the 'Increase Current Scale' radio button. An annotation points to it: "Select **Increase Current Scale**".
- 2**: A red box highlights the 'Increase Points By' text box containing '2.75' and the '%' symbol. An annotation points to it: "Key in the percentage value you want to increase the pay scale by".
- 3**: A red box highlights the 'Increase Type' dropdown menu, which is open and shows 'With Rounding' (selected), 'With Rounding', and 'Without Rounding'. An annotation points to it: "Select a rounding option".

At the bottom of the dialog box are 'OK' and 'Cancel' buttons.

Example:

The HR Assistant pay scale was increased by 2.75%. WBS/WizHR will round up or down to the nearest pound, when **With Rounding** is selected.

The figure shows three screenshots of the 'HR Assistant' pay scale configuration window. Each window has a 'Grade' field set to 'HR Assistant' and a 'Pay Scale Points' section with 12 points. Red boxes highlight the values for Point 6 in each screenshot, with red lines connecting them to show the progression from the original value to the unrounded result and then to the rounded result.

Point	Original Value	Without Rounding	With Rounding
Point 1	10000	10275	10275
Point 2	11000	11302.5	11302
Point 3	12000	12330	12330
Point 4	13500	13871.25	13871
Point 5	14600	15001.5	15002
Point 6	15700	16131.75	16132
Point 7			
Point 8			
Point 9			
Point 10			
Point 11			
Point 12			

a. Original Payscale values

b. **Result:** Without Roundingc. **Result:** With Rounding

b. Increase All Scales

This will increase all salary scales by the percentage value you indicate

- Select **Increase All Scales**
- Key in the percentage to increase the scale by
- Select **With Rounding** or **Without Rounding** from the Rounding drop down list (see the example above on rounding implications)
- Click on **OK**
- The pay scales will be updated immediately

The 'Auto Increase By' dialog box is shown with three numbered annotations:

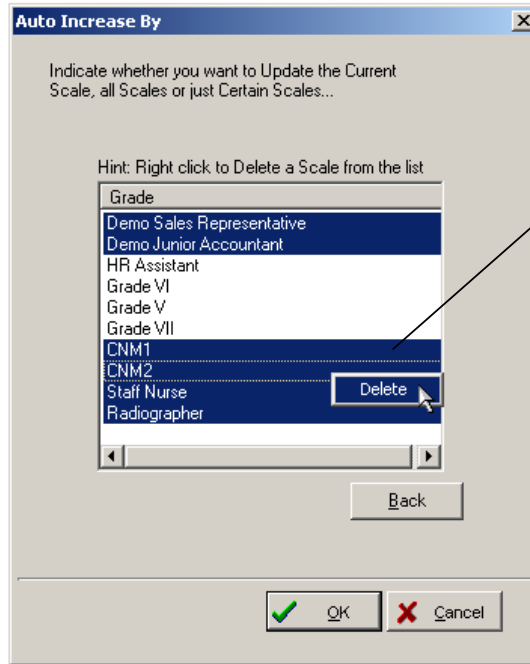
- 1**: Select **Increase All Scales** (indicated by a red box around the radio button).
- 2**: Key in the percentage value you want to increase the pay scales by (indicated by a red box around the '2.75' input field).
- 3**: Select a rounding option (indicated by a red box around the 'With Rounding' dropdown menu).

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

c. Increase Certain Scales

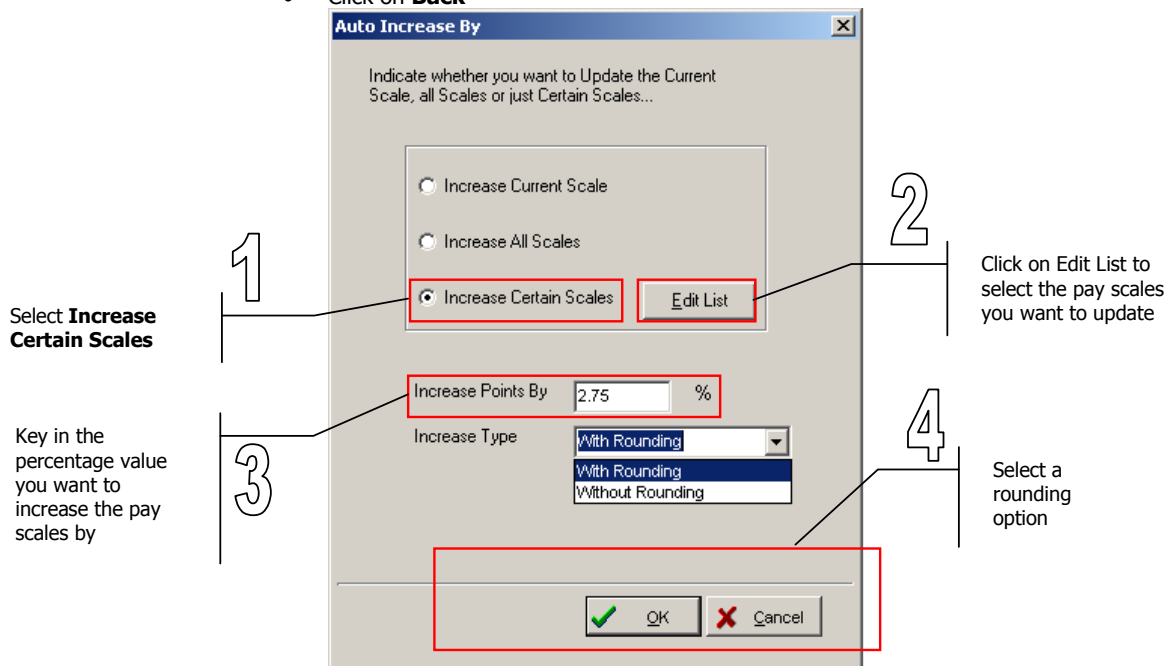
This will increase the salary scales selected by the user

- Select **Increase Certain Scales**
- Click on the **Edit List** button
- A dialog box appears with a list of available pay scales



Using the shift key, select the grades you do **NOT** want update

- Use the shift key and the mouse to highlight the grades/pay scales you do **NOT** want to update
- Right click over one of the highlighted grades and select delete
- The remaining pay scales will be updated
- Click on **Back**

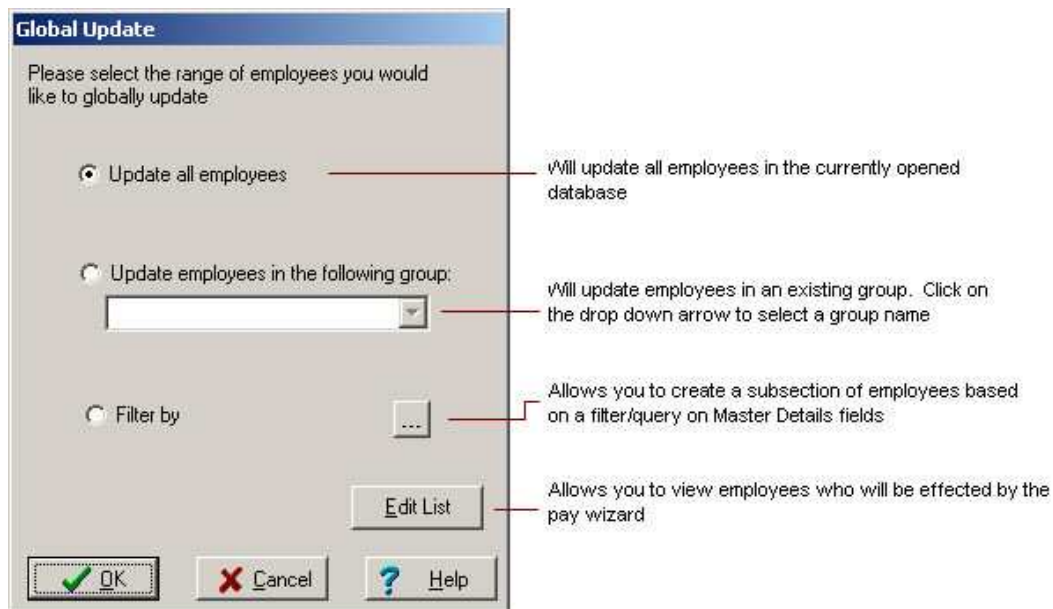


- Key in the percentage to increase the scale by
- Select **With Rounding** or **Without Rounding** from the Rounding drop down list (see the example above on rounding implications)
- Click On **OK**
- The selected pay scales will be updated immediately

3. Global Update/Pay History Screen

When you have updated the pay scales, the employee pay records must then be updated to complete the process. The Pay Wizard will add a new pay record to the selected employees pay file. It will not alter or amend existing pay records. This ensures that you have a history of each employees pay (click on the **List** tab to view an employees pay history). The following, documents updating employees pay records based on pay scales.

1. Open the **Employee Pay Details** screen
2. Click on the **GlobalUp** button
3. The message "Are you sure all other users are out of the Product?" appears. Click on **Yes**
4. The following dialog box appears.



5. Use this dialog box to select the employees whose pay records will be affected by the Pay Global Update. The options available are (click on each topic to view more details): -

a. Update all employees

- Update all employees in the currently opened database
- Click on **Edit List** to view a list of all employees in the database
- Click on **Back** to return to the Global Update dialog box

b. Update employees in the following group

- Select an existing group from the drop down list
- Click on **Edit List** to view the employees in the selected group
- Click on **Back** to return to the Global Update dialog box

c. Filter by

- The Filter by option may be used in cases where you do not want to update all employees pay records and you have not made a group of the employees you do want to update.
- To use the Filter By Option:
- Click on the **Filter By** radio button
- Under **Fields**, select a field from the Master Details screen that you will use the base the filter on (in the case below, Job Title)
- Under **Field Value**, key in the criteria (in the case below, Administrator)

The screenshot shows a dialog box titled "Filter by" with a close button (X) in the top right corner. On the left, a list box labeled "Fields" contains the following items: Home Telephone, Work Telephone, Pager Number, Fax Number, EMail Address, Mobile Telephone, Status, RSI Number, Title, Division, Department, and Job Title. "Job Title" is selected. Below the list are two tabs: "All" and "Searched". On the right, a section labeled "Job Title" contains a "Field Value" text box with "Administrator" entered and a "Clear" button. Below this is a "Search Type" section with three radio buttons: "Exact Match", "Partial Match at Beginning" (which is selected), and "Partial Match Anywhere". There is also a "Case Sensitive" checkbox which is unchecked. At the bottom of the dialog, there are two tabs: "By Value" and "By Range". Below these are "Field Order" options: "Alphabetic" and "Logical" (which is selected). At the bottom right, there are four buttons: "View Summary", "New Search", "OK" (with a green checkmark icon), and "Cancel" (with a red X icon).

- Click on **OK** when you have finished adding criteria
 - Click on **Edit List** to view a list of employees that match the criteria you specified
 - Click on **Back** to return to the **Global Update** dialog box
6. On selecting one of the above options click on **OK**
 7. The Pay Global Update dialog box appears
 8. Select **Update as per Pay Scales** from the **Increase Type** drop down list.
 9. Update the selected employees (see above) pay record according to the pay scales. WBS/WizHR will match the Grade and Point on Scale that selected employees are currently on and match the pay against the pay scales (see Company Pay Scales, Section 2 above).
 10. Click on OK
 11. Wait a few moments while WBS/WizHR, adds a new pay record to each of the selected employees.

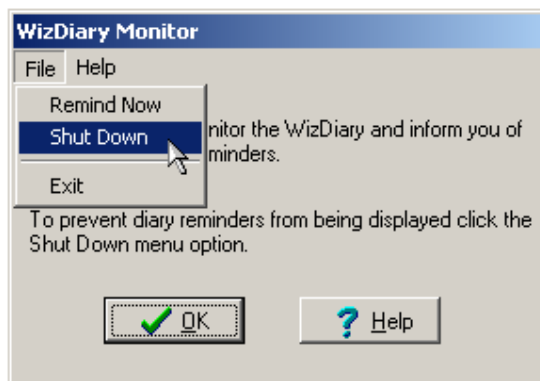
4. Appendix

4.1 Turning off the Diary Reminder

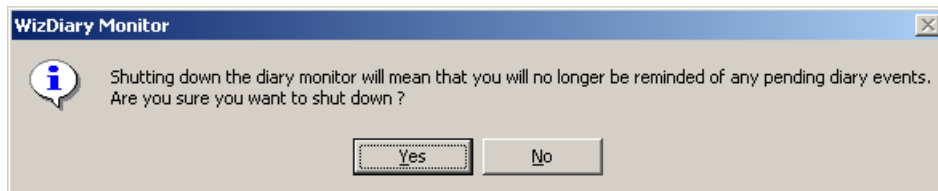
1. Double click on the Wiztec Diary Monitor on the system tray



2. The following dialog box appears: -



3. Click on **File**
4. Click on **Shut Down**
5. The following message box appears: -



6. Click on **Yes**