How To Use GrandMaster Suite

Managing Users

GrandMaster®
Suite

CANPAY
Software Inc.

Table of Contents

How to Use GrandMaster Suite - Managing Users

Overview

GrandMaster Suite integrates Payroll, Human Resource, Employee Scheduling, Time Keeping, Electronic Funds Transfer and Resource Planning. With such diverse functionality, many organizations often request that their software users be given access to only those parts of the program that relate to their particular job. Many employers also wish to ensure that their users are not presented with unnecessary features and options that may distract or overwhelm.

Further, there is the whole issue of security. Many companies today rely on computers and the promise of secure and confidential data. With this in mind, it's even more important to ensure that your valuable employee data is presented only to those who need to work with it, and not simply to anyone who has access to the computer.

As such, we have provided a simple and effective way to help you manage your software users so that they can fully access the programs and features that they need. At the same time, each user can have certain features and option deactivated, thus removing any distraction.

Why Should I Manage Users?

- To ensure that your GrandMaster Suite software users have access to the specific features to which their jobs pertain.

- To remove unnecessary features and options that do not relate to a given user.

- To ensure security and confidentiality by restricting data access to only those users who require it.

- To create unique User IDs that allow a user to run the program.

- To assign the individual passwords for each user.

- To assign various processing settings that apply to all users.

How Does it Work In GrandMaster Suite?

The Administration Module allows you to configure program settings and assign privileges to various users. This module is accessible by all users unless the Supervisor has specifically restricted its access.

Multi-User System

GrandMaster Suite is a multi-user system. This means your organization can have an unlimited number of users. This is especially important if your company has multiple departments and you need to manage your users based on their job functions.

Access to program modules or features
can be assigned on a per-user basis
(e.g. User can be assigned access to the Payroll module
only with no access to Human Resources or EFT)

Payroll

Human Resource

Electronic Funds Transfer

Administration
(Access to all program Modules)

Payroll Clerk
(Access to Payroll
Module only)
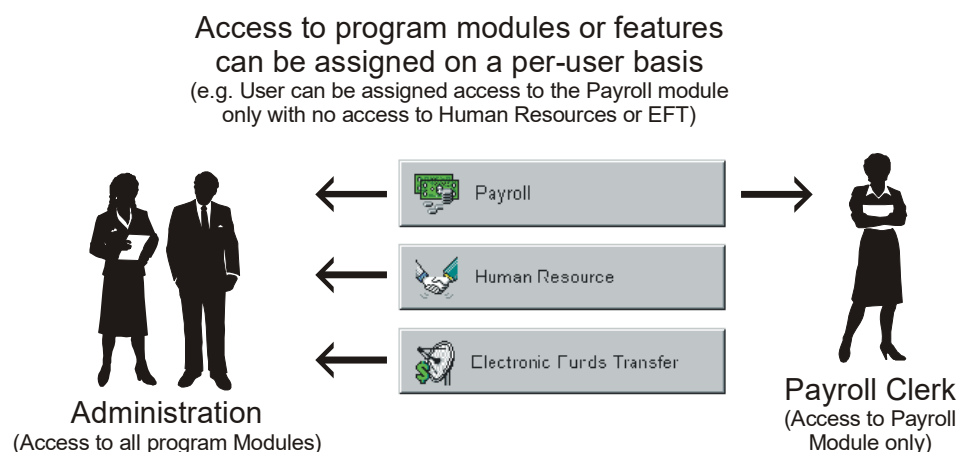
You can even setup certain users to be sub-supervisors for their own departments. This will give them the ability to assign rights and privileges to the people who work under them. This can free up the time that would otherwise be spent by the overall system supervisor.

Unique User IDs

As mentioned earlier, users can be setup with varying degrees of access to the program, based on their job duties. This is accomplished through the use of *User IDs*. Each user must be assigned a unique ID or they will not be able to log into the program.

> **Note: Using the Administration Module** - We recommend that this module be used only by a supervisor who has knowledge of your payroll system. Incorrect use of the module can easily render the program inaccessible to your users.

When is the Best Time to Set up This Feature?

User IDs - The optimal time to set up a User ID is as soon as you know the user is going to be working with the GrandMaster software. The sooner you provide them access to the program, the sooner they will be able to begin working.

Employee Settings - For general program access, you first need to know exactly what the user's role will be with respect to the software. Once you understand the user's requirements, you can assign their relevant features and options.

Keep in mind that the Supervisor can change settings anytime as required. If a user later finds that a certain feature need to be accessed, it's a simple matter to request the additional settings from the Supervisor.

Working at the Payroll Level

User management does not relate specifically to either the Payroll level or the Employee level. That is, you define Users IDs and manage the settings from within the Administration Module (which is completely outside of the Payroll module). Once your settings are defined, however, they can have an affect on your use of the Payroll Module (or other modules for that matter).

The Default "Supervisor" ID

When you install the GrandMaster Suite License, the program will automatically create a default User ID entitled "SUPERVISOR". This default User ID is defined with no password so that first-time installers can fully access the program. Once you logon as the Supervisor, you can begin to create or edit subsequent User IDs.

Creating User IDs

The User ID creation process can be carried out by the supervisor or by a user who has been assigned the appropriate supervisory rights. The next section of this guide will assume that you are the program Supervisor.

To Create A User ID:

1. Choose the *GrandMaster Suite - GrandMaster Suite* command from the *Start* button.
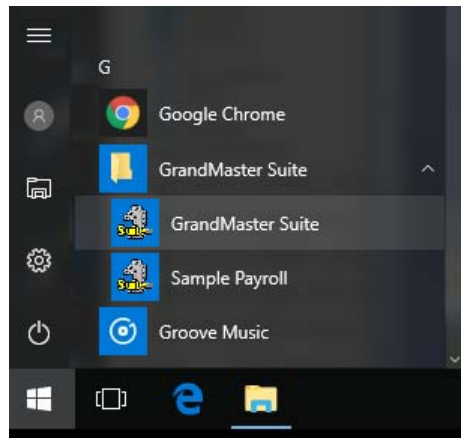
Fig. 1
The Start Menu with GrandMaster Suite Selected

After the verification stage is complete, the software license information is displayed and the *GrandMaster Logon* dialog box is displayed.
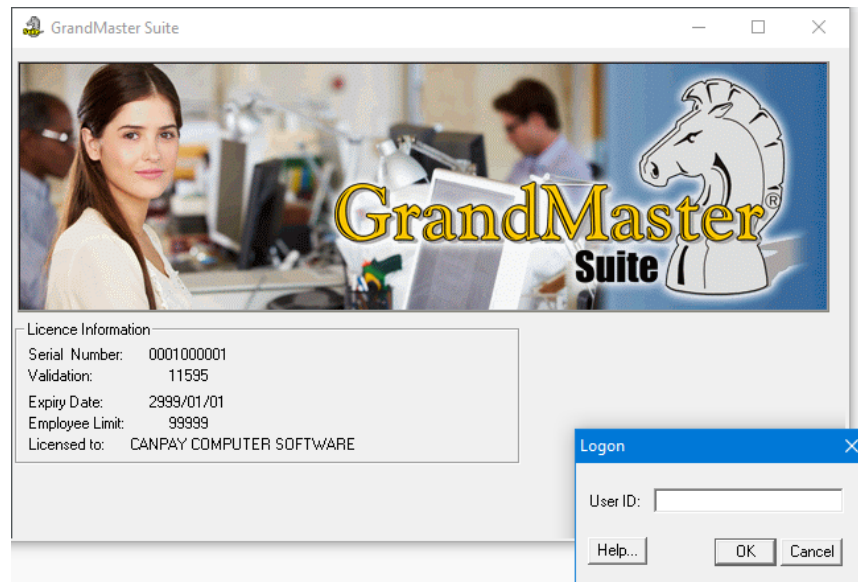
Fig. 2
The GrandMaster Logon Dialog Box

2.   Enter the word ""Supervisor" in the *User ID* field then click *OK*.
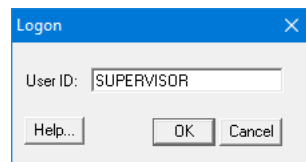
Fig. 3
The Completed GrandMaster Logon Dialog Box

This closes *Logon* dialog box and opens the *GrandMaster System Manager* window.
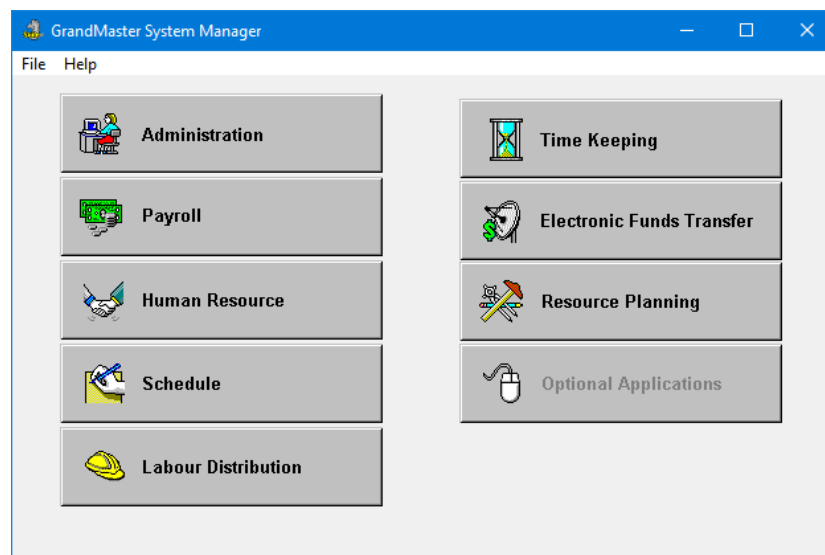
Fig. 4
The GrandMaster System Manager Window

The *System Manager* window is the starting point for all program functions. It provides access to each of your installed modules. Each time you login to the program, this window will appear.

3. Choose the *Administration* button to access the *Administration Module* window, then select *Manage User IDs* command from the **File** menu.
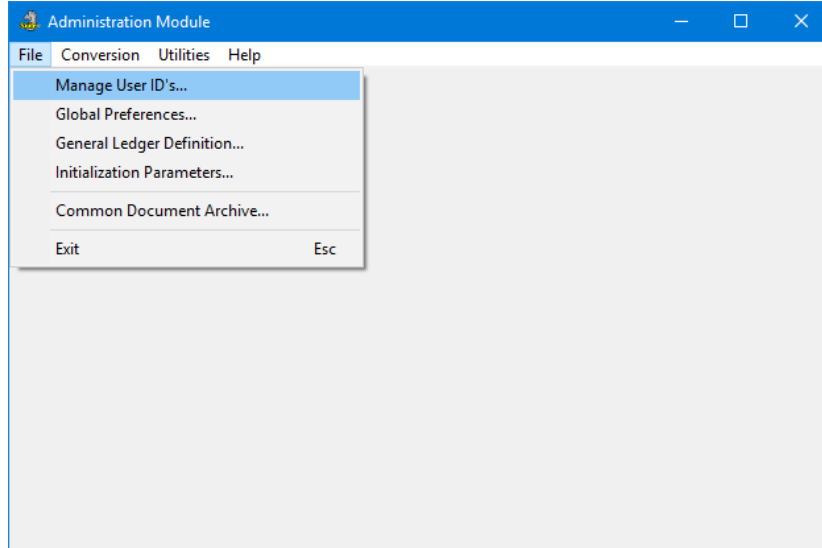
Fig. 5
The Manage User IDs Command

This opens the *Manage User IDs* dialog box where you can create or edit the user IDs for your employees.
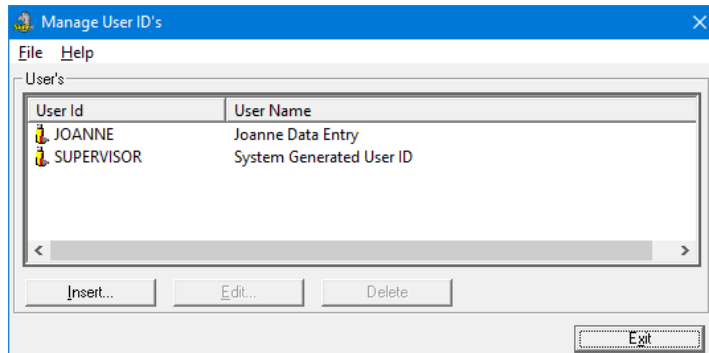
Fig. 6
The Manage User IDs Dialog Box

If you have never created User IDs with this installation of the program, the only ID that will appear in the list will be the system-defined Supervisor ID. In our example above, we have two supervisor IDs.

4. Select the *Insert* button to open the *New User ID* dialog box, then enter the name of the new program user in the *User ID* field. This name can be up to 10 alphanumeric characters. The name should be unique and descriptive enough to differentiate between other IDs should you create more the future.

> **Note: The User ID -** The User ID must not contain spaces or special characters (e.g. &, %, #, etc.). If you require a separator, use an underscore (_).
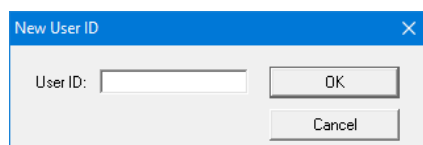
Fig. 7
The New User ID Dialog Box with Sample Name

5. Click *OK* to accept the user ID. This closes the dialog box and opens the *Edit User ID* dialog box. This is where you must define the details for the new ID.
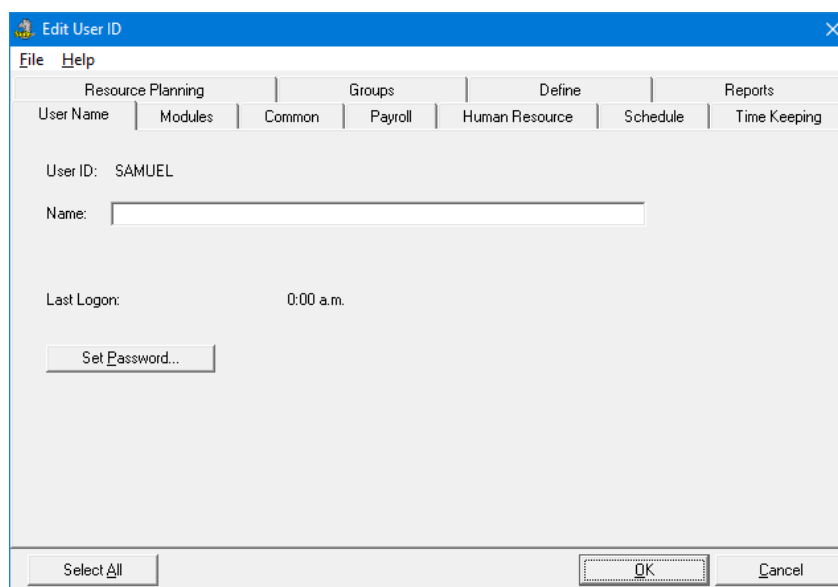
Fig. 8
The Edit User IDs Dialog Box

6. Enter the user's full name in the *Name* field. This will allow you to differentiate between IDs that are similar in spelling.

Even though you have not yet completed the remaining options in this dialog box, you could stop at this point and choose the *OK* button to complete the User ID process. The resulting ID would not have access to any program modules or features since you have not yet defined any settings.

Continue With the User ID Settings

The next section of this guide to discusses how to provide your users with a password for security purposes.

Assigning User Passwords

All program users should be assigned a secure password that allows each person to access the program. This feature assures that proper security is maintained with your valuable payroll data. For password discretion, the characters you type will not be displayed on the screen when the password is entered.

To Assign a User Password:

1. If you have just completed the previous lesson you will have the *Edit User ID* dialog box open on your screen. If you are beginning this lesson from scratch, simply open the *Edit User ID* dialog box by double-clicking on a user's name from the *Manage User IDs* dialog box.

2. Choose the *Set Password* button from the center of the dialog box. This opens the *Set User ID Password* dialog box where you can define the password for the current user.
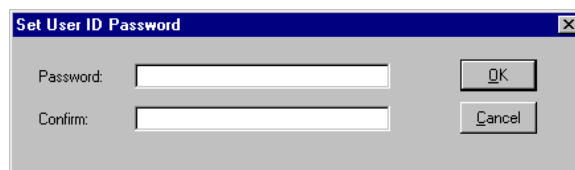
Fig. 9
The Set User ID Password Dialog Box

This password will be required each time the associated user logs on to the program. This feature helps to ensure that proper security is maintained with your valuable data.

Assigning Passwords - It is recommended that you assign a password to *every* program user. If you create a user ID and do not assign it a password, anyone can logon to the program if they happen to guess the ID (which is usually defined simply as the person's name or department).

3. In the *Password* field, enter up to a 20-character alphanumeric password. Remember to note the whether the password is upper or lower case.

Password Formatting - The password must not contain spaces or special characters (e.g. &, %, #, etc.). If you require a separator, use an underscore (_).
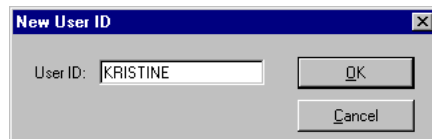
Fig. 10
The New User ID Dialog Box with Sample Name

4. Click *OK* to accept the password. This closes the dialog box and returns you to the *Edit User ID* dialog box.

> **Remember Your Password***!* - Each payroll user should be instructed to remember their password. If this password is forgotten the user will not be able to access the payroll unless the Supervisor reassigns them a new one. If the Supervisor does not recall the password, you may need to forward your payroll database to CanPay for analysis to determine the original password.

Continue With the User ID Settings - The next section of this guide discusses how to provide your users with access to specific program modules.

To Assign User Settings

Each program user can be assigned various setting that affect their interaction with the program. This includes such items as the modules they can access, the types of reports and data they can view, and so on.

To Assign User Settings:

1. If you have just completed the previous lesson you will have the *Edit User ID* dialog box open on your screen. If you are beginning this lesson from scratch, simply open the *Edit User ID* dialog box by double-clicking on a user's name from the *Manage User IDs* dialog box.

2. Choose the *Modules* tab from the top of the dialog box. This displays a tab that allows you to assign access to the GrandMaster Suite program modules.
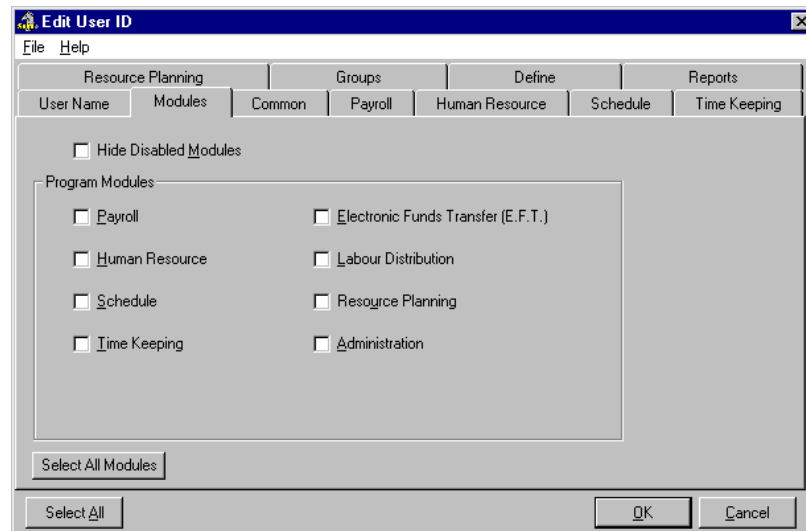
Fig. 11
The Modules Tab

3. In the *Program Modules* section, place a check in each box based on the user's need of the module. In our example, our payroll clerk Kristine will only be provided access to the *Payroll* and *Electronic Funds Transfer* modules.
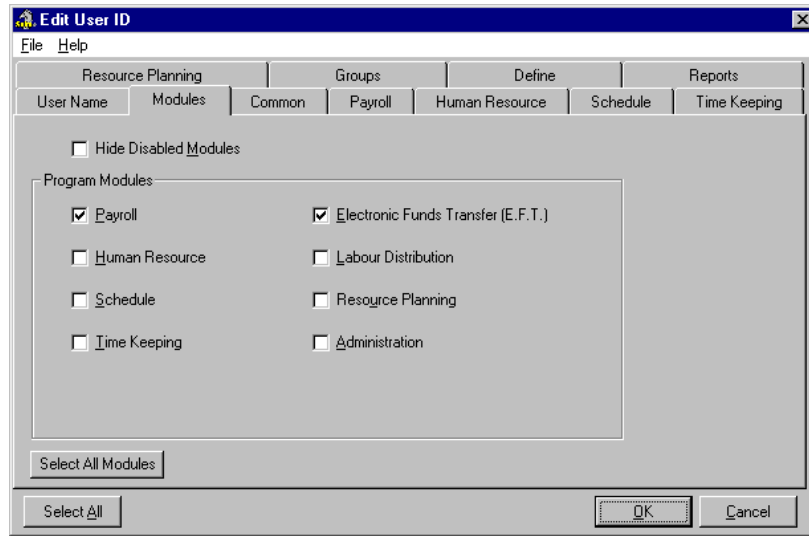
Fig. 12
Two Modules Selected

4. If you want the user to have access to every program module, choose the *Select All Modules* button. This saves you the time of having to place a check in every box.

    Continue With the User ID Settings - The next section of this guide discusses how to show or hide modules of which the user has not been assigned access.

Hiding Disabled Modules

If you have assigned only a few modules to a given user and wish to hide the disabled modules from their view, you can do so easily using an option found in the *Edit User ID* dialog box.

To Hide a Disabled Module:

1. Choose the *Modules* tab from the *Edit User ID* dialog box, and then place a check in the *Hide Disabled Modules* checkbox. This will cause the *System Manager* window to display only those modules which the user is assigned.
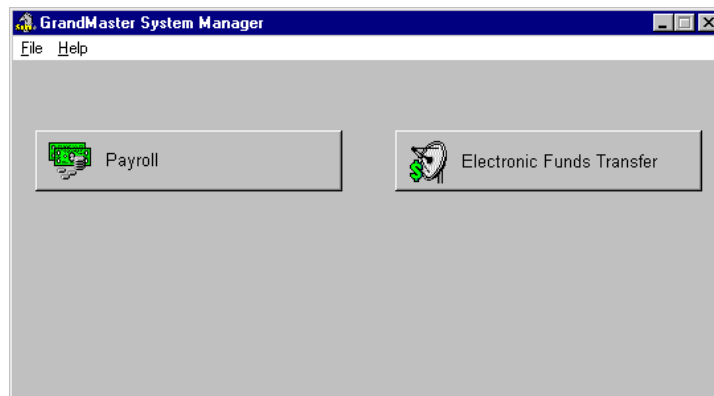
Fig. 13
Two Modules Enabled With Disabled Modules Hidden

2. If you have assigned only several modules to a given user and do not wish to hide the disabled modules from their view, leave the *Hide Disabled Modules* checkbox unchecked. This will instruct the *System Manager* window to display all of the program modules, but the unassigned modules will appear in disabled form (i.e. the button will be grayed).
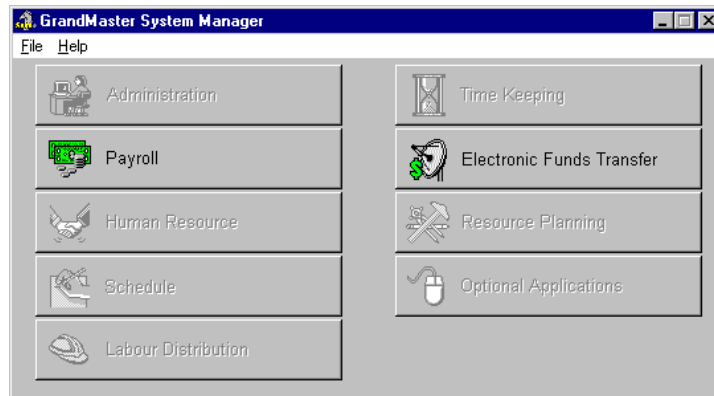

Fig. 14
Two Modules Enabled Without Hiding the Others

Continue With the User ID Settings - The next section of this guide discusses how to provide your users with access to settings that are common across most modules.

Assigning Common Settings

There may be circumstances where you need to assign specific program accesses on a user-by-user basis. For example, you can specify whether a user may add, change, or delete various items in the payroll database.

To Assign Common Settings:

1. Choose the *Common* tab from the top of the dialog box. This displays a tab that allows you to assign settings that are common to most users and can be found in most program modules.

Fig. 15
The Common Tab

2. In each section, place a check in the appropriate box if the user will be allowed to *Add, Change* or *Delete* the various items. Use the following definitions for assistance:

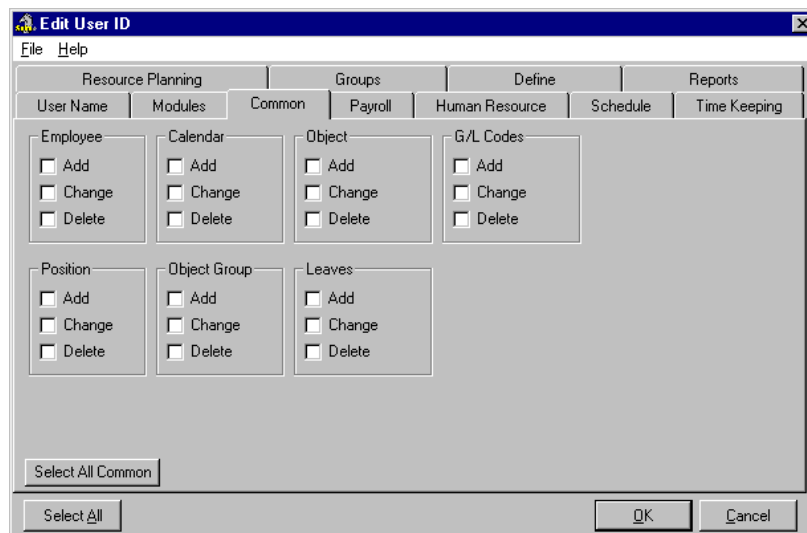| Common Tab	
Employee	Place a check in the appropriate box if the user will be allowed to *Add, Change* or *Delete* employees in the payroll database.
Calendar	Place a check in the appropriate box if the user will be allowed to *Add, Change* or *Delete* calendar items. The Calendars feature allows you to specify statutory and special company holidays via a system calendar.
Object	Place a check in the appropriate box if the user will be allowed to *Add, Change* or *Delete* objects. Object represent a broad category of items that you can create within the program. For example, Earnings, Deductions, Leave Types, Positions, etc. Generally speaking, any items that you can create in a list (and which you can assign a name) can be considered an object.
G/L Codes	Place a check in the appropriate box if the user will be allowed to *Add, Change* or *Delete* General Ledger (G/L) codes. G/L Codes can be defined via the *Administration Module's* **File - *General Ledger Definitions*** command.
Position	Place a check in the appropriate box if the user will be allowed to *Add, Change* or *Delete* employee Position records. Positions can be defined via the *Payroll Module's* **Payroll - *Position Update*** command.
Object Group	Place a check in the appropriate box if the user will be allowed to *Add, Change* or *Delete* object groups. Object groups are used in conjunction with the *Resource Planning* module.
Leaves	Place a check in the appropriate box if the user will be allowed to *Add, Change* or *Delete* employee Leave records. Leaves can be defined via the *Human Resource Module's* **Employee - *Employee Leaves*** command.

Continue With the User ID Settings - The next section of this guide discusses how to provide your users with access to settings that relate to the *Payroll Module*.

Assigning Payroll Module Settings

GrandMaster Suite allows you to assign specific payroll access and privileges for each user. For example, data entry personnel may be permitted to enter data only, but will have restricted access in terms of other program functions such as printing, EFT, viewing pay rates, etc.

To Assign Payroll Module Settings:

1. Choose the *Payroll* tab from the top of the dialog box. This displays a tab that allows you to assign settings that are common to the program's *Payroll* module.
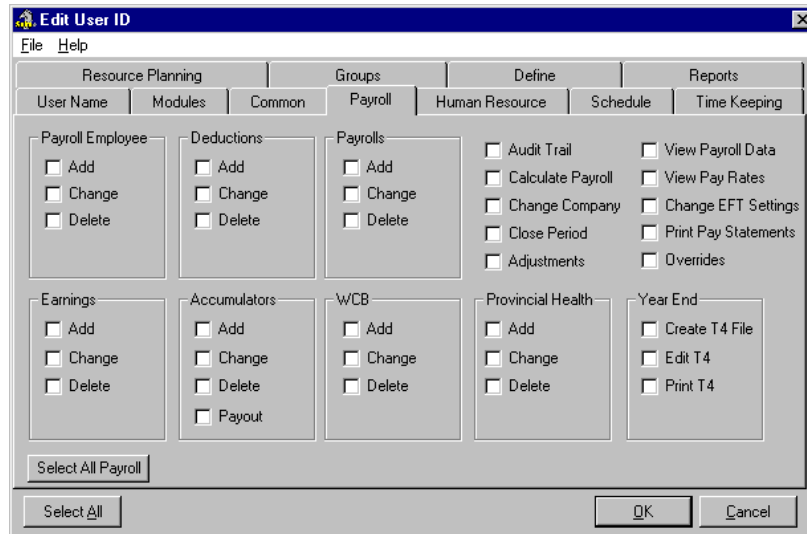
Fig. 16
The Payroll Tab

2. In each section, place a check in the appropriate box if the user will be allowed to *Add, Change* or *Delete* the various items. Use the following definitions for assistance:

Payroll Tab	
Payroll Employee	Place a check in the appropriate box if the user will be allowed to *Add, Change* or *Delete* employees in the payroll database.
Deductions	Place a check in the appropriate box if the user will be allowed to *Add, Change* or *Delete* deductions. Deductions can be defined via the *Payroll Module's* **Payroll - *Deductions*** command.
Payrolls	Place a check in the appropriate box if the user will be allowed to *Add, Change* or *Delete* payrolls. Payrolls can be defined via the *Payroll Module's* **File - *New*** command.
Earnings	Place a check in the appropriate box if the user will be allowed to *Add, Change* or *Delete* earnings. Earnings can be defined via the *Payroll Module's* **Payroll - *Earnings*** command.
Accumulators	Place a check in the appropriate box if the user will be allowed to *Add, Change* or *Delete* accumulators. Accumulators can be defined via the *Payroll Module's* **Payroll - *Accumulators*** command.
WCB	Place a check in the appropriate box if the user will be allowed to *Add, Change* or *Delete* WCB records. WCB records can be defined via the *Payroll Module's* **Payroll - *Workers Compensation*** command.
Provincial Health	Place a check in the appropriate box if the user will be allowed to *Add, Change* or *Delete* Provincial Health records. Provincial Health records can be defined via the *Payroll Module's* **Payroll - *Provincial Health*** command.
Year End	Place a check in the appropriate box if the user will be allowed to *Add, Change* or *Delete* year end items. These privileges are slightly different than the preceding in that most do not involve the creation of a record within a given list. Rather, these privileges refer to the act of creating, editing or year-end data files such as T4, T4A and Relevé1s. These items can be found using the various commands located under

	the *Payroll Module's **Year End*** menu.	
Miscellaneous	Place a check in the appropriate box if the user will be allowed to modify the corresponding item. These items include:	

- Audit Trail
- Calculate Payroll
- Change Company
- Close Period
- Adjustments
- View Payroll Data
- View Pay Rates
- Change EFT Settings
- Print Pay Statements
- Overrides

3.   Using the previous two steps as reference, proceed through the remaining tabs and assign the settings that are appropriate for the current user. Keep in mind that each tab will differ in purpose and available features. If you need a reference guide for a particular option, press F1 at any time to view the online help.

4.   Once you have complete the settings for the various tabs, choose the *OK* button to close the *Edit User ID* dialog box. This saves your changes and returns you to the *Manage User IDs* dialog box where you can add another user or modify an existing one.

Summary

You have now completed a User ID. With this information in place your software user can begin working with the GrandMaster Suite program..


SUMMARY - TO CREATE A USER ID:

- Open the *Administration* module and choose the ***Manage User IDs*** command

- Choose the *Insert* button and enter a name for the new user.

- Use the tabs in the *Edit User ID dialog* box to assign the specific rights and privileges for the user.

Modifying User Information

Once a user has been created and saved, their information can be edited at any time. This can become necessary when a user changes jobs and needs to have their program access upgraded or restricted. Sometimes a user will find that they need further program access only after they have begun using the program.
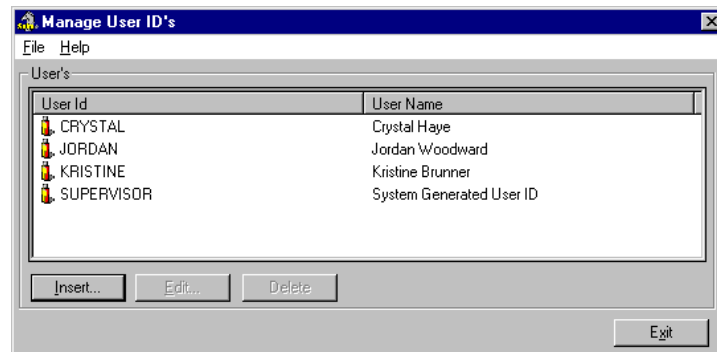
To Modify A User:

1.   With the *Administration* module open, choose the **File -** *Manage User IDs* command.
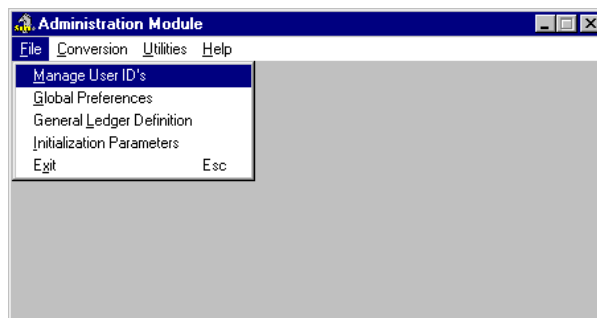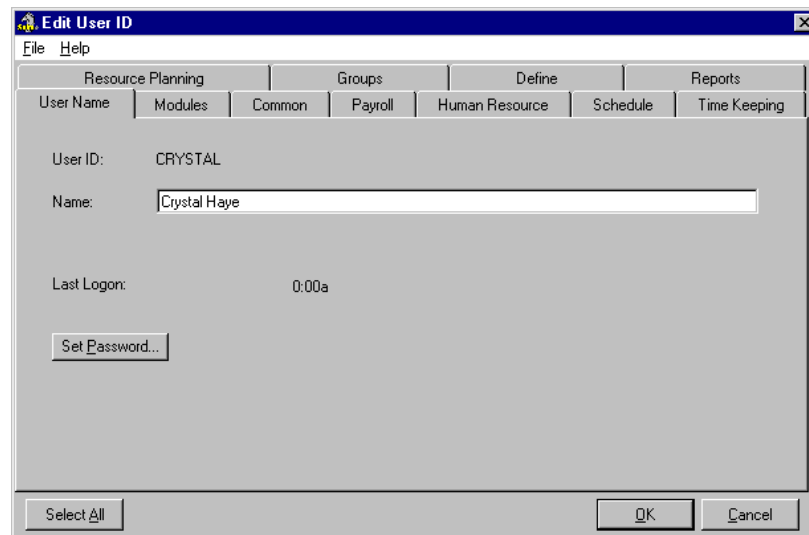

Fig. 17
The Manage User IDs Command

This opens the *Manage User IDs* dialog box that displays a list of existing users.

Fig. 18
The Manage User IDs Dialog Box with Several Users

2. Select the user you wish to modify by clicking once on their name, then choose the *Edit* button. This opens the *Edit User ID* dialog box where you can view or the details for the selected user.

Fig. 19
The Edit User IDs Dialog Box with an Existing User

**3.** Modify the settings as required then click *OK* to accept the changes once you are done.

Deleting a User

If you have one or more users defined in the *Administration Module* and no longer require them, they can be removed easily. It can be useful to remove a user under certain circumstances, such as if they are no longer employed with your company or if they have changed jobs and no longer require access to the software. Many administrators simply like to maintain clean lists of current users only.

To Delete A User:

1. With the *Administration* module open, choose the **File - *Manage User IDs*** command. This opens the *Manage User IDs* dialog box that displays a list of existing users.

2. Select the user you wish to remove by clicking once on their name.
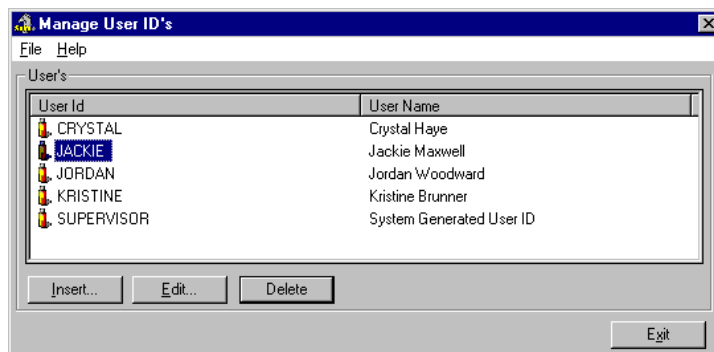
Fig. 20
A User Selected for Removal

3. Select the *Delete* button. This displays a message prompting you to confirm the permanent removal of the user. Click *Yes* to confirm the removal or *No* to retain the user.

Fig. 21
The Confirmation Message

Viewing User Information

If you ever need to verify the information for one or more users, you can do so easily via the *Administration Module*.
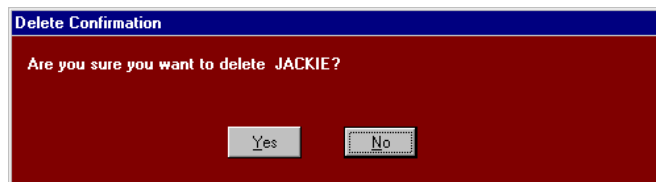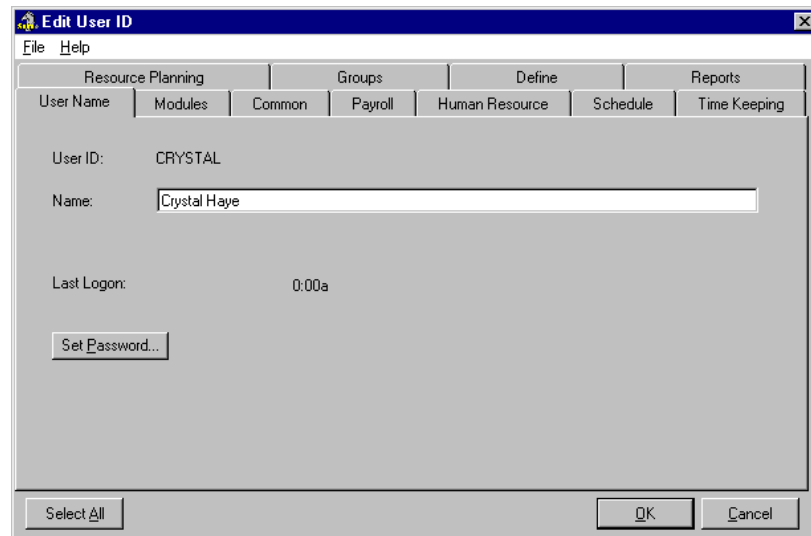
To View A User's Information:

1. With the *Administration* module open, choose the **File - *Manage User IDs*** command. This opens the *Manage User IDs* dialog box that displays a list of existing users.

2. Select the user you wish to view by clicking once on their name, then choose the *Edit* button. This opens the *Edit User ID* dialog box where you can view details for the selected user.

Fig. 22
The Edit User IDs Dialog Box

3. Use the various tabs to review the settings for the selected user then click *Cancel* once you are done (if you have not made any changes). If you have made some changes, choose the *OK* button to save them.

Frequently Asked Questions

What if a user forgets his password?.

If a user forgets his/her password, they will not be able to access the payroll. The Supervisor can assign reassign them a new one as long as the Supervisor is aware of the original password. If the Supervisor does not recall the password, you may need to forward your payroll database to CanPay for analysis to determine the original password.

How many users can work with the program?

GrandMaster Suite is a multi-user system that allows up to 100 different users (including the Supervisor). If the program is installed on a local area network, all of your users may simultaneously access the program.

Can another person be assigned supervisory rights while the original supervisor is away?

Yes. If the Supervisor is going to be away for a given period of time, another user can temporarily be assigned the appropriate privileges that will allow them to respond to user management issues.

Can I change settings once a user has started working with the program?

Yes. The program Supervisor can change a user's settings anytime as required, as long as the user is not logged into the program. This is a fairly common occurrence since many users find that they need access to certain features only after they have started using the program.