



Your people. Our priority.™

Overtime Hours Rules

User Guide

For Microsoft Dynamics® GP Version 2015

Copyright

Manual copyright 2014 Integrity Data. All rights reserved.

Limitation of Liability

The content of this manual is furnished for informational use only, is subject to change without notice and should not be construed as a commitment by Integrity Data. Integrity Data assumes no responsibility or liability for any errors or inaccuracies that may appear in this manual. Neither Integrity Data nor anyone else who has been involved in the creation, production or delivery of this documentation shall be liable for any indirect, incidental, special, exemplary or consequential damage, including but not limited to any loss of anticipated profit or benefits, resulting from the use of this documentation or sample code.

Publication Date

May 2015

Table of Contents

- Introduction 5
 - Process..... 5
 - Quick Setup Steps 5
 - Default Rules..... 6
- Installation Overview 7
 - Prerequisite 7
 - Install Notes..... 7
 - Server/Client..... 7
 - Manual Install..... 13
 - Files Installed 14
- Registration..... 15
 - Activation Manager Window..... 15
 - Version Information..... 16
- Security Settings..... 17
- Overtime Hours Rules Setup Window 18
- Overtime Rules Setup Window 20
- Employee Overtime Rules Maintenance Window 24
- Rules Code Mass Assign Window 26
- Overtime Hours Build Report..... 28
- Scenarios 29
 - Example of Overtime Hours Rules with a Rule Priority Setup = Daily then Weekly then Period 29
- Hints and Essentials 44
- FAQ's..... 45
 - Can you have multiple overtime rules assigned to an employee? For example, overtime is anything over 8 hours in a day or over 40 hours in a week..... 45
 - If you want to have one of each rule type apply to all employees do you have to assign each employee the Overtime Rules?..... 45
 - Is Overtime Hours Rules supported for bi-monthly or monthly payrolls?..... 45
- Activation Manager Messages 46
 - Activation Failed: Trial invalid or trial period expired 46
 - Activation Failed: Site name does not match this installation 46
 - Activation Failed: Product Name does not match this installation..... 46
 - Trial period for Overtime Hours Rules has expired..... 46
 - Employees Allowed has been exceeded 46

Activation Failed: Unable to contact web service. Activate manually or revert to previous product dictionary.....	46
Activation Failed: Product has been deactivated	46
Upgrade Failed: Enhancement Plan period expired. Renew Enhancement Plan or revert to previous product version.....	46
Overtime Hours Rules: Activation Failed.....	46
Overtime Hours Rules Messages	47
You must inactivate the Automatic Overtime feature in GP before activating Overtime Hours Rules. OK	47
You must inactivate Overtime Hours Rules before activating Automatic Overtime. OK.....	47
Only one default rule for this type may exist. Unmark previous default rule? Delete Cancel.....	47
Pay codes were not assigned since already in use by another rule code of the same rule type. OK.....	48
You cannot activate a rule code for an employee when the rule code is inactive in setup. OK.....	48
Deactivate Product.....	49
Inactivate	49
Uninstall.....	49
Contact Information	50

Introduction

Overtime Hours Rules product allows users to better manage overtime scenarios and configure multiple methods of calculating overtime hours to be paid to employees.

The user can now accommodate rules that may vary based on employee, department, position or rules that are unique to certain states or companies. Overtime is managed based on day, week, pay period or all three combined.

Process

The main process for Overtime Hours Rules could be described as follows:

- The user establishes and configures Overtime Rule Codes.
- The rule codes describe how overtime is to be measured and how it is to be recorded in transactions. It also describes which pay codes are going to be subject to the rules.
- Rule codes are then assigned to employees and can be configured by employee.
- During payroll, the Overtime Hours process runs and searches for transactions with pay codes that should be considered for overtime.
- The payroll transactions that match the setup parameters are split into normal and overtime transactions.
- The process runs in different ways depending on how the user has configured the order in which calculation occurs via the Rule Priority.
- Additionally the user can mass assign Overtime Hours Rules to employees.

Quick Setup Steps

The following are the quick reference steps necessary to set up the Overtime Hours Rules product and begin processing transactions immediately:

1. The first step in using Overtime Hours Rules is to make sure that the Automatic Overtime function of Microsoft Dynamics GP is disabled in Payroll Setup window. Overtime Hours Rules replaces standard overtime functionality in Microsoft Dynamics GP. [Microsoft Dynamics GP > Tools > Setup > Payroll > Payroll]
2. Activate Overtime Hours Rules in the [Overtime Hours Rules Setup](#) window and specify a Rule Priority. The default will be daily, weekly and period.
3. Create Overtime Rules in [Overtime Rules Setup](#) window which most accurately reflect the businesses rules and regulations for handling overtime.
4. Designate any default rules (optional). Default rules will apply to any employees who have no rules explicitly defined for them. Default rules are a quick way to start using Overtime Hours Rules but do not apply when employees have other rules assigned, see [Default Rules](#) section for more information.

5. Assign any rules to employees if default rules do not apply to the employee.
6. Now that setup is complete, run payroll.

Default Rules

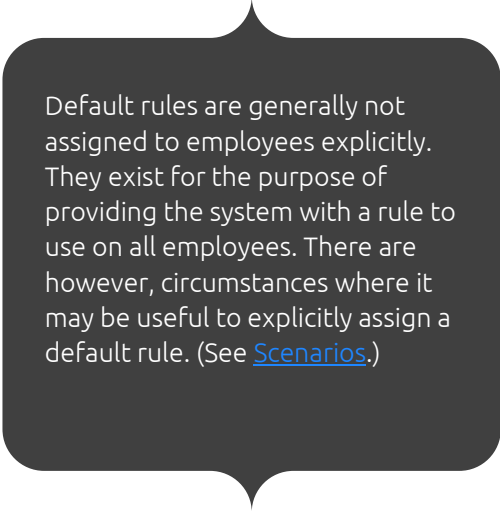
A default rule is a rule that applies to employees who do not have an overtime rule code assigned and meet the overtime criteria on the [Overtime Rules Setup window](#).

One default rule may be specified for each Rule Type. There are three rule types: daily, weekly and period. An employee may be subject to none, one or multiple default rules.

As long as the employee has no overtime rules explicitly assigned to them in [Employee Overtime Rules Maintenance window](#), then the default rule(s) will apply.

As soon as a single overtime rule is specified for an employee the system will ignore all default rules for the employee and process only the rule that was assigned to the employee. If the rule assigned to the employee is of a different type than the default rule(s) the system will process only the rule assigned to the employee.

The default rule will be applied to all the employees who currently do not have an overtime rule assigned to them. If an overtime rule has been created and assigned to an employee, the default rule is overridden.



Default rules are generally not assigned to employees explicitly. They exist for the purpose of providing the system with a rule to use on all employees. There are however, circumstances where it may be useful to explicitly assign a default rule. (See [Scenarios](#).)

Installation Overview

This section will discuss the prerequisites, list the files installed and go through the install process.

Prerequisite

The prerequisite for Overtime Hours Rules is:

- Microsoft Dynamics GP Payroll

Install Notes

Prior to installing complete the steps below:

1. Confirm all users are logged out of Dynamics GP 2015
2. Complete all payroll runs and validate no payrolls are in process
3. Make a backup of the Company and Dynamics databases

If Integrity Data Products Comprehensive Leave Manager and Negative Payroll Transactions are registered, insure the following settings:

- When using both Comprehensive Leave Manager and Overtime Hours Rules, the OHR6489.dic file must be referenced prior to the ELM.dic file in the users Dynamics.set file.
- When using both Negative Payroll Transactions and Overtime Hours Rules, Negative Payroll Transactions must be entered into the system on the beginning date of the transactions.

Server/Client

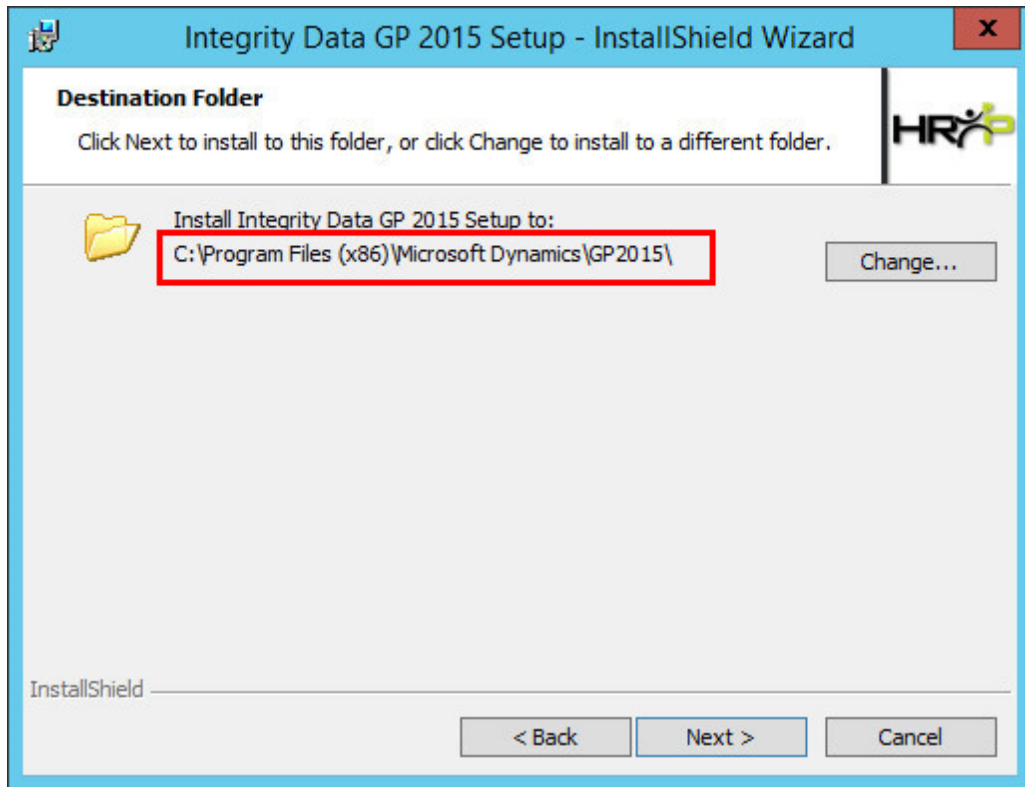
To install Overtime Hours Rules downloaded the exe file from our [website](#). Once the files have been downloaded, you can run them on the Server and/or Client Installations. The product will need to be installed on all machines that process payroll. If you will send with using Microsoft Outlook then download the Outlook Setup.exe in addition to the Integrity GP 2015 Setup.exe

Complete the steps required at the Server and/or Client level to create the necessary Microsoft SQL Server® Components. Creating the Microsoft SQL Server Components needs to be performed on a single computer, typically the server.

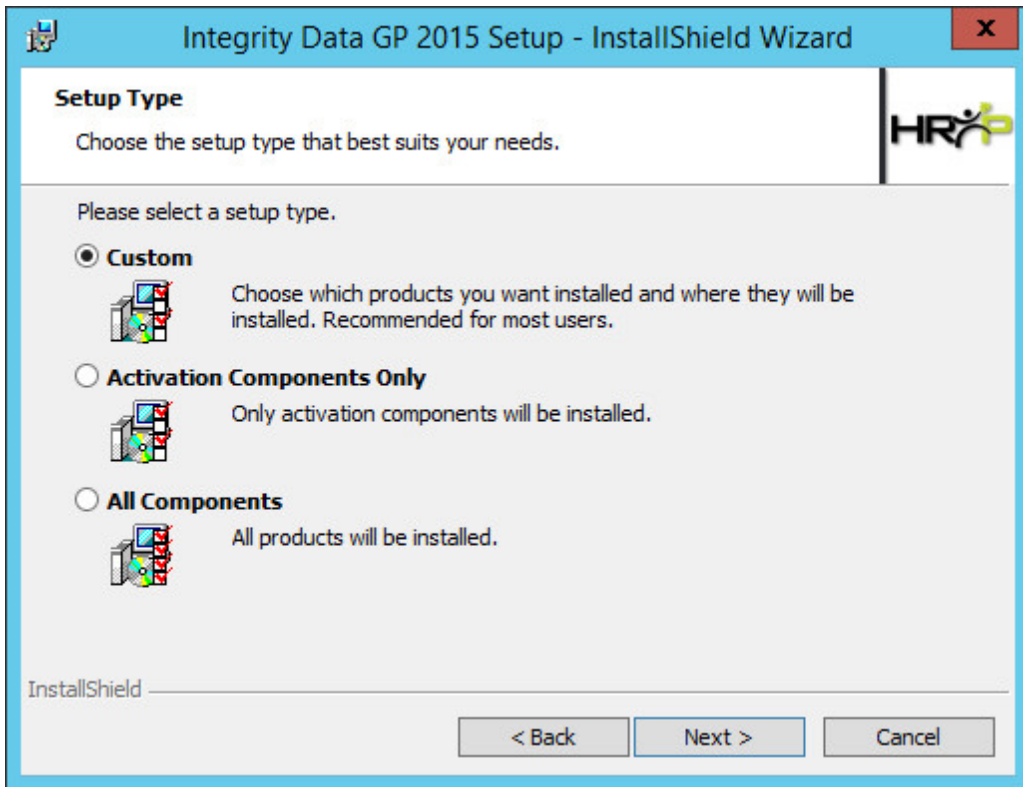
1. Right click Integrity Data GP2015 Setup.exe file and select "Run as Administrator". If you do not see this option, hold the shift key down and right click.
2. Complete the steps in the wizard



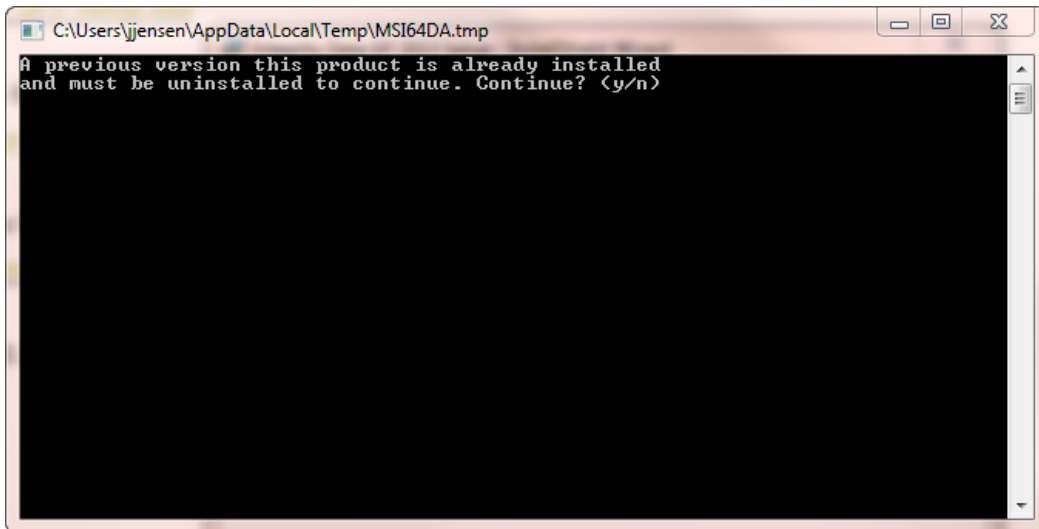
3. Verify the GP directory is correct if it is not select Change



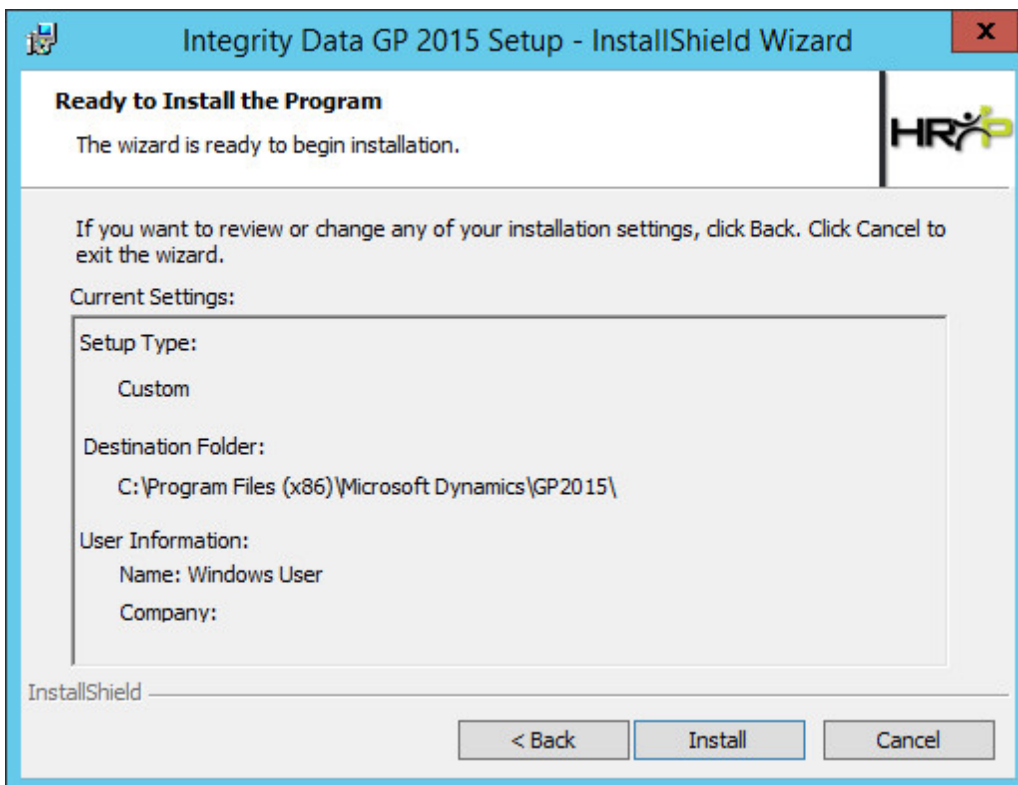
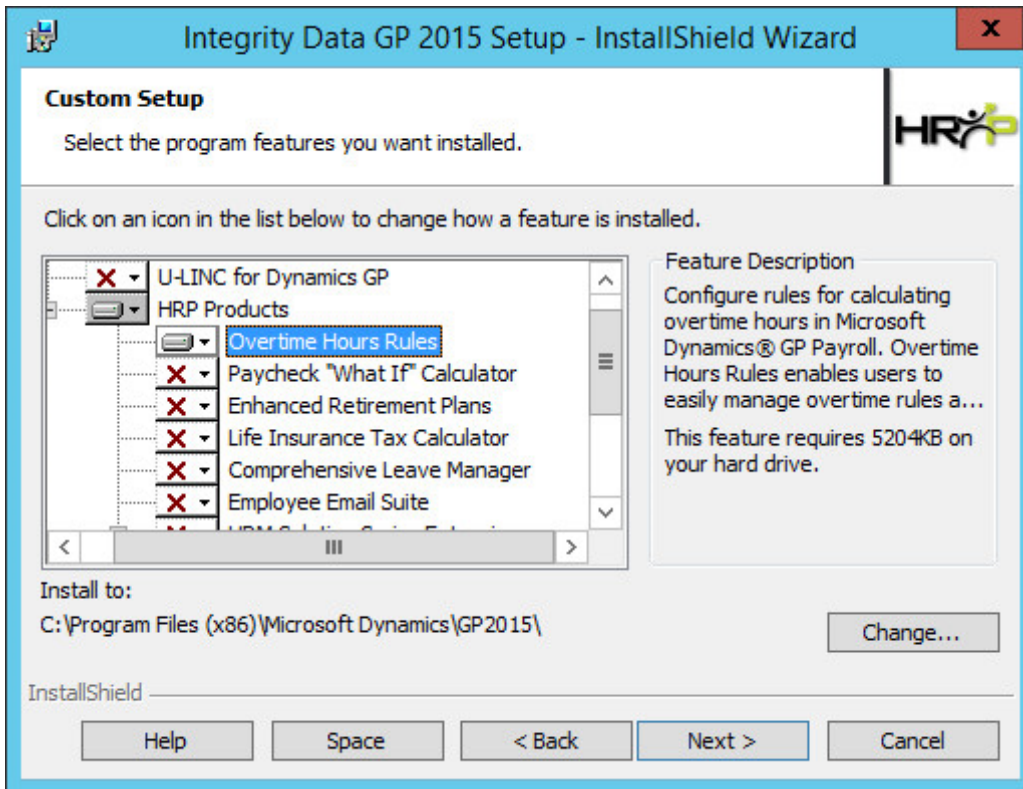
4. Select Custom to choose to install only the specific products you purchased.
5. Select Activation Components to only install activation manager files. This option will not install products and it is typically run only to fix an error with activation manager.
6. Select All Components to install all Integrity Data products. The products you did not purchase will register with a 30-day trial period.



If you are upgrading you will be prompted to uninstall the older version, select “y”. If you have multiple products, it will uninstall all products.



7. Select the product(s) to install, if installing multiple products, select all that need to be installed.





8. Launch Microsoft Dynamics GP 2015.
9. If prompted to include new code, choose yes.
10. Login as the 'system administrator' for each company to create the SQL Server components.
11. The system will auto activate the products you have purchased if you have access to the internet on the machine. If you receive a message Activation Manager failed contact support@integrity-data.com and include a screenshot of the [Activation Manager window](#) to receive manual keys.

BEST PRACTICES

Install is not a requirement on the **Server**; however it is recommended.

Install updated version on previously installed **Client** machines.

Manual Install

If the user encounters errors during the installation, complete the following steps to manually install Overtime Hours Rules:

1. Contact support@integrity-data.com to receive the manual install files for the product(s).
2. Copy and paste the files into the appropriate locations.

GP Folder (C:\Program Files\Microsoft Dynamics\GP2015)

- OHR6489.cnk or OHR6489.dic
- IDA6537.cnk
- Integrity.Registration.Addin.dll
- Application.IntegrityDataActivation.dll
- Integrity.Registration.Constructor.dll

Documentation Folder (C:\Program Files\Microsoft Dynamics\GP2015\Documentation)

- Overtime Hours Rules GP 2015 User Guide.pdf

3. Edit the Dynamics.exe.config

- Navigate to the GP folder (C:\Program Files\Microsoft Dynamics\GP2015)
- Backup the Dynamics.exe.config by making a copy and saving the copy ****Important****
- Open Dynamics.exe.config in Notepad
- Find the <addin> and under <Dynamics> copy and paste the following:
<addin name="IDKeyManagerAddIn"
type="Integrity.Registration.Addin.GPAddIn,Integrity.Registration.Addin,Version=12.0.4.25370,Culture=neutral,PublicKeyToken=b7ed37edf026e3bc"/>
- Under <DynamicsGPweb> copy and paste the following:
<addin name="IDKeyManagerAddIn"
type="Integrity.Registration.Addin.GPAddIn,Integrity.Registration.Addin,Version=12.0.4.25370,Culture=neutral,PublicKeyToken=b7ed37edf026e3bc"/>

```

Dynamics.exe.config - Notepad
File Edit Format View Help
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <configSections>
    <section name="shell" type="Microsoft.Dexterity.Shell.ShellConfigurationSection,Microsoft.Dext
    <sectionGroup name="addins">
      <section name="Dynamics" type="Microsoft.Dexterity.Bridge.AddinsConfigurationSection,Microso
      <section name="DynamicsGPWeb" type="Microsoft.Dexterity.Bridge.AddinsConfigurationSection,Microso
      <section name="dynutils" type="Microsoft.Dexterity.Bridge.AddinsConfigurationSection,Microso
    </sectionGroup>
  </configSections>
  <shell>
    <formFactories>
      <!--Factory type specifies "fully.qualified.class.name,assemblyName"-->
      <!--ProductId is the id of the dex dictionary containing the forms you want to control-->
      <!--tag structure is-->
      <!--<add name="yournamehere" factoryType="fully.qualified.class.name,assemblyName" productId=
      <add name="workFlow-SwitchCompany/SwitchCompany" productId="0" formId="101" windowId="1" fact
      5"/><add name="workFlow-GL_Batch_Entry/GL_Batch_Entry" productId="0" formId="34" windowId="1" fact
      ry,Microsoft.Dynamics.GP.workflow.Client,Version=12.0.0.0,Culture=neutral,PublicKeyToken=31bf3856
      cs.GP.workflow.workflowFormFactory,Microsoft.Dynamics.GP.workflow.Client,Version=12.0.0.0,Culture=
      owId="1" factoryType="Microsoft.Dynamics.GP.workflow.workflowFormFactory,Microsoft.Dynamics.GP.wor
      mId="402" windowId="1" factoryType="Microsoft.Dynamics.GP.workflow.workflowFormFactory,Microsoft.D
      d="682" windowId="1" factoryType="Microsoft.Dynamics.GP.workflow.workflowFormFactory,Microsoft.Dyr
      windowId="1" factoryType="Microsoft.Dynamics.GP.workflow.workflowFormFactory,Microsoft.Dynamics.Gf
      loyee_MNT" productId="1911" formId="303" windowId="1" factoryType="Microsoft.Dynamics.GP.workflow.
    </shell>
  <addins>
    <!-- Each addin needs an entry in the dynamics.exe.config file in the proper section(s). -->
    <!-- The format of the entry is: <addin name="<name>" type="<fully qualified type name>" /> --
    <!-- <name> is just a friendly name for the addin, but it does need to be unique within the se
    <!-- <fully qualified type name> has the following format: "<class name>,<assembly name>[,<ver
  <Dynamics>
    <addin name="IDKeyManagerAddIn" type="Integrity.Registration.Addin.GPAddIn,Integrity.Registra
    <addin name="BIREportDeploymentDU" type="Microsoft.Dynamics.GP.BusinessIntelligence.BIREportD
    .GP.ExcelBuilder.GPAddIn,eone.Dynamics.GP.ExcelBuilder.Engine,Version=12.0.0.0,Culture=neutral,Put
    soft.Dynamics.GP.DocAttach.GPAddIn,Microsoft.Dynamics.GP.DocAttach,Version=12.0.0.0,Culture=neutr
  <dynutils>
    <addin name="BIREportDeploymentDU" type="Microsoft.Dynamics.GP.BusinessIntelligence.BIREportD
  <DynamicsGPWeb>
    <addin name="IDKeyManagerAddIn" type="Integrity.Registration.Addin.GPAddIn,Integrity.Registrat
    <addin name="ManagedStorage" type="Microsoft.Dynamics.GP.ManagedStorage.ManagedStorage,Microso
  </addins>
  <startup useLegacyV2RuntimeActivationPolicy="true">

```

4. Launch Microsoft Dynamics GP.
5. Login as the 'system administrator' for each company to create the SQL Server components.

Files Installed

The following files are installed:

- GP Folder (C:\Program Files\Microsoft Dynamics\GP2015)
 - OHR6489.cnk or OHR6489.dic
 - IDA6537.cnk (C:\Program Files\Microsoft Dynamics\GP2015)
 - Integrity.Registration.Addin.dll (C:\Program Files\Microsoft Dynamics\GP2015\AddIns)
 - Application.IntegrityDataActivation.dll (C:\Program Files\Microsoft Dynamics\GP2015)
 - Integrity.Registration.Constructor.dll (C:\Program Files\Microsoft Dynamics\GP2015)

Documentation Folder (C:\Program Files\Microsoft Dynamics\GP2015\Documentation)

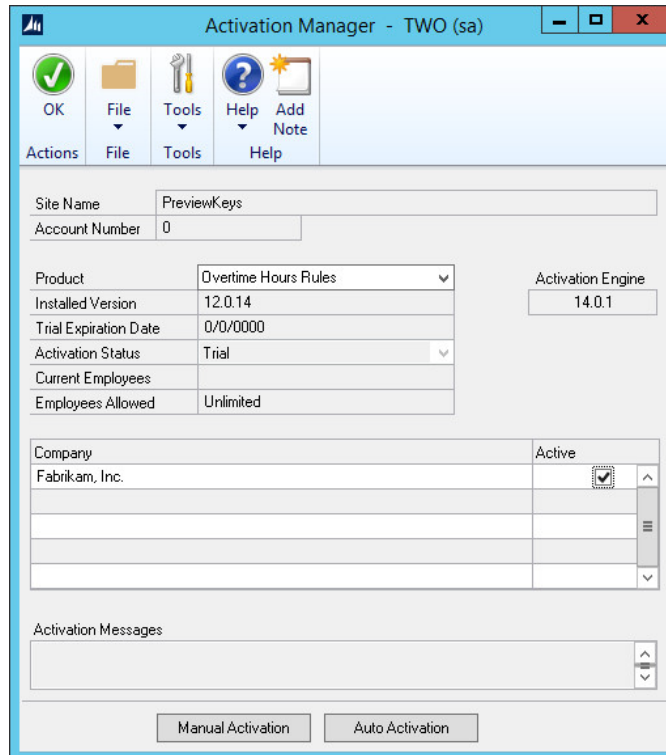
- Overtime Hours Rules GP 2015 User Guide.pdf

Registration

The system will automatically activate the product during the login process. If the activation was successfully, the user will not receive any message. However, if the activation process was unsuccessful the user will receive a message. If the activation process fails the user will need to open the [Activation Manager window](#) to activate the product.

Activation Manager Window

Microsoft Dynamics GP > Tools > Setup > System > Activation Manager



The **Site Name** defaults from the session information on the About Microsoft Dynamics GP window.

From the **Product** drop-down list the user may select the product they wish to activate and review product information. Once the product is selected the following fields will display:

- **Installed Version** – Current version number installed.
- **Enhancement Plan Date** – Date of the enhancement plan expiration.
- **Activation Status** – Current status of the product.
 - **Permanent** – Product has been purchased.
 - **Trial** – Product has been issued a trial period.
 - **Deactivated** – Product has been deactivated.
- **Current Employees** – This count defaults from the session information on the About Microsoft Dynamics GP window. The count does not include inactive employees or employees in a Test or Historical company. If the current employee count is incorrect validate [Test or Historical companies](#) are named correctly.

- **Employees Allowed** – The number of employees allowed before the product will be inactivated. If the Current Employees exceeds the Employees Allowed the system will deactivate the product.

The scrolling window contains a list of all **companies**. By default the product is **active** for all companies. If the user would like to inactivate a company unmark the company checkbox.

The **Auto Activation** option may be selected if the user receives a message at login stating the product is not activated. When the user selects the Auto Activation option the system will attempt to automatically activate the product. Once the Auto Activation process is complete the system will display the **Activation Messages**. For a detailed list of activation messages see the [Activation Manager Messages](#) section.

The **Manual Activation** option is used to manually enter a token. The user would only manually enter a token if they were sent a token by Integrity Data.

Select the **OK** button to close the window.

Test and/or Historical Companies

Registration will not count the active employees in Test or Historical company databases if the Company Name is named correctly, specifically at the end of the Company Name the user must append the following: "<TEST>" or "<HISTORICAL>". See examples below:

- Dextordinary, Inc. <TEST>
- Dextordinary, Inc. <HISTORICAL>

To access and modify the Company Name open the Company Setup window via Microsoft Dynamics GP > Tools > Setup > Company > Company when logged into the Test or Historical Company that needs modified.

Version Information

To obtain the latest Overtime Hours Rules version information, visit our [website](#).

Within Microsoft Dynamics GP verify the version for Overtime Hours Rules by selecting the Help Button, select About Microsoft Dynamics GP and then select the Options button. Click OK until the Overtime Hours Rules window appears.

Security Settings

The Security Task Setup window may be used to grant or restrict access to the Overtime Hours Rules windows. To open the window, select the Microsoft Dynamics GP menu, select Tools, select Setup, select System, select Security Tasks, and enter the system password.

1. Select the appropriate Task items. To identify the appropriate task item complete the steps below:
 - Open the User Security Setup window (Microsoft Dynamics GP > Tools > Setup > User Security), select the appropriate user and make a note of the Security Role ID assigned to the user.
 - Open the Security Role Setup window (Microsoft Dynamics GP > Tools > Setup > Security Roles), select the Role ID that has been assigned to the user and make note of the Security Task ID assigned to the Role. Use this Task ID to grant security to the Overtime Hours Rules.
NOTE: The most common Task ID used is TRX_PAYRL_004 – Print Payroll Checks
2. Select Overtime Hours Rules for the Product.
3. Select Windows for the Type and select 3rd Party for the Series.
4. Use the Access List to grant or restrict access to individual items.
 - To grant or restrict access to an item for this Task ID, click the checkbox to mark or unmark the item.
 - Click the Mark All button to grant access to all items in the list or click the Unmark All button to restrict access to all items in the list.
5. Click File > Print to print the Security Task Setup Report for the selected Task ID.
6. Choose OK to save your changes.

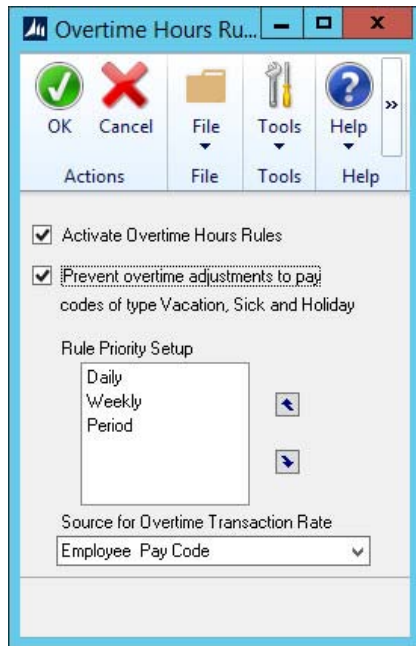
Overtime Hours Rules > Windows > 3rd Party > Access List

- APR Main Menu
- Employee Overtime Rules Maintenance
- OHR fields
- Overtime Hours Rules Setup
- Overtime Rules
- Overtime Rules Setup
- Registration – OHR
- Rule Code Mass Assign

Overtime Hours Rules Setup Window

Microsoft Dynamics GP > Tools > Setup > Payroll > Overtime Hours Rules Setup

The Overtime Hours Rules Setup window is used to activate the Overtime Hours Rules product and specify the Rule Priority Setup order for calculating overtime.



The system will not allow you to mark the checkbox and exit the window if you have not already disabled the Automatic Overtime function of Microsoft Dynamics GP in the Payroll Setup window.

The **Activate Overtime Hours Rules** checkbox is unmarked by default and must be marked before the system will activate the overtime rules process during calculation. The Activate Overtime Hours Rules checkbox must also be marked in order for Rule Priority Setup to be specified. If the user receives an error message [“You must inactivate the Automatic Overtime feature in GP before activating Overtime Hours Rules.”](#) or [“You must inactivate Overtime Hours Rules before activating Automatic Overtime.”](#) More detailed information and solution is provided in the Overtime Hours Rules [Messages](#) section.

The order in which rules are applied will influence the overtime transactions. (See [Overtime Hours Rules Process for Rule Priority](#) example)

When the **Prevent overtime adjustments to pay codes to type Vacation, Sick and Holiday** is marked the system will include hours for pay codes of type Vacation, Sick and Holiday in the overtime hours calculation but will not adjust hours for those pay codes.

Rule Priority Setup refers to the order in which the Overtime Hours Process will calculate overtime hours. Using the default example above the system would calculate any overtime as a result of hours worked during the day first. Then it would

calculate weekly hours and apply any overtime rules that apply to the number of hours in the week. Lastly, it will process rules for the period as a whole.

The **Source for Overtime Transaction Rate** contains a drop-down list that allows the user to select from three options on how to determine the rate used for overtime hours transactions.

- **Employee Pay Code** – the rate for the overtime pay code transaction will be pulled from the Employee Pay Code Maintenance window for the overtime pay code.
- **Originating Transaction** – the rate for the overtime pay code transaction will be pulled from the payroll transaction that created the overtime transaction. For example, if the original transaction was HOUR at a rate of \$12 the system would apply the overtime rules and create any necessary overtime transactions. The overtime transactions would have a rate of \$12.
- **Originating Transaction w/ Factor** – the rate for the overtime pay code transaction will be pulled from the payroll transaction that created the overtime transaction and then the overtime factor will be applied. For example, if the original transaction was HOUR at a rate of \$12 the system would apply the overtime rules and create any necessary overtime transactions. If the factor for the overtime pay codes was .5 the system would apply a rate of \$6 for the overtime transaction.

Overtime Rules Setup Window

Microsoft Dynamics GP > Tools > Setup > Payroll > Overtime Rules

The Overtime Rules Setup window is used to create overtime rules that will be assigned to employees and will dictate the way overtime transactions are created in payroll.

Hours From	Hours To	Use Code	Description
7.50	8.00	EXCESS	Unscheduled Time
8.01	999.99	OVER	Overtime Pay
0.00	0.00		

Rule Code - Create a rule code which may contain alphanumeric and a maximum of six characters long.

Default – Mark this checkbox to set this rule as a default rule. Only one rule can be marked as the default rule for each Rule Type. Thus, it is possible to have up to three default rules marked, one for each rule type.

Default rules **do not have to be assigned to an employee to function**. When an employee has no rule code assigned, any and all rules marked as default will apply to that employee. (See [Scenarios](#)) When an employee has at least one rule code assigned then no default rules apply and only the rule codes explicitly assigned to the employee will apply.

Inactive – Mark this checkbox to inactivate a rule code. The employees may keep using the rule code if the user **does not** roll down the changes, as this would inactivate the code at the employee level.

Include History TRX – Mark this checkbox to include history transactions from previous payrolls. For example, if the pay period dates are 01/16/2001 to 01/31/2001 but the overtime rule should look at pay codes for the week starting on Sunday 01/14/2001. The first transaction is for 01/16/2001 if the Include History TRX is marked the system will look at the payroll history for 01/14/2001 and 01/15/2001 for the included codes to determine if the employee has exceeded the range for overtime.

Leave Originating TRX – Mark this checkbox to not reduce the hours from the originating transaction used to create an overtime transaction. If an employee worked 10 hours and anything over 8 hours is considered overtime, if the checkbox is unmarked the system will reduce the 10 hours to 8 and create an overtime transaction for 2 hours. If the checkbox is marked the system will create the overtime transaction for 2 hours and leave the originating transaction at 10 hours.

Remove After Blended Rate Calc – Mark this checkbox if using Overtime Rate Manager to blend the overtime rates. The system will calculate the blended rates and create the overtime transaction. After the calculation it will reduce the originating transaction and add the rate from the originating transaction to the overtime code.

For example, the rule states any time over 40 hours a week results in overtime. If an employee worked 10 hours the first four days in pay code HOUR at a rate of \$20.00 then worked 10 hours on day five in pay code HOUR 2 with a rate of \$10.00 the system would allow Overtime Rate Manager to calculate the rate at \$9.00 ($\$900.0/50 \text{ hours} = \$18.00 \text{ per hour} * .5 = \9.00). After the blended rate is calculated the system reduces day 5 transaction to 0 hours and adds the \$10.00 rate to the overtime code. The final result is 40 hours at \$20.00 and 10 overtime hours at \$19.00.

7th Consecutive Day Overtime – Mark this checkbox if using Overtime Hours Rules to calculate all time on a 7th day as overtime. This is enabled only for weekly rule types. When checked, if an employee works all 7 days of a given “pay week” the system will process all time on day 7 as overtime. An important distinction is that it is not any consecutive 7 day period; it is the 7 day period as defined by the pay week. Thus, one could work the last 4 days of week 1 and the first 3 days of week 2, and the system will NOT process day3 of week 2 as overtime based on this setting.

Rule Description – The Rule Description is for clarification purposes of the rule and does not impact the calculation.

Rule Type

There are three rule types to choose from: Daily, Weekly and Period.

- **Daily** rules will apply rules to daily transactions.

For example, if the company policy states anything over 8 hours a day is considered overtime. If there are multiple transactions for a single day, the system will add all the transactions together and see if they exceed 8 hours total when using the daily rule.

- **Weekly** rules will apply rules to transactions that happen within a given week.

Attention California
Users!

Use this option to comply
with State Overtime
regulations.

- **Begin Pay Week** options will allow the user to define a day of the week when a pay week begins or define that a pay week begins when the first transaction begins.

During the build process when a weekly rule is calculated, the calculation will start the 7 day count for a weekly rule using the settings defined for Begin Pay Week. The system will look to the first transaction for the employee (called transaction X for this example) and then act according to the following:

1. If the begin pay week is set to “transaction” then the system will start the 7 day count from X.
2. If the begin pay week is set to a day of the week and X is also on the same day of the week, then the system will also start the 7 day count from X.
3. If the begin pay week field is set to a day of the week and X is NOT on the same day of the week then the system will search backwards from X until it finds the first day which matches the day in the begin pay week field. It will then start the 7 day count from that date.

When determining number of hours to include in a given week overtime calculation they system will use the start date of a multi-day transaction and assign the hours to that date.

For existing weekly rules for setup and maintenance records, the system will set the Begin Pay Week DDL to “transaction”.

For example, if the company policy states anything over a 40 hour workweek is considered overtime. The system considers a week to be a 7 day period. The 7 day period begins on the date of the employee’s first transaction in the build or as dictated by the Begin Pay Week option. NOTE: Employees may have different start dates for their 7 day weeks if Transaction is selected for the Begin Pay Week option.

- **Period** rules will apply rules to all transactions that happen within the payroll build.

For example, if the company policy states anything over 80 hours is considered overtime. This is generally used for calculating overtime for a whole pay period, such as bi-weekly. If the pay period is monthly or semimonthly, then the rules should be set up to reflect the number of hours in the pay period. Typical examples (for a normal full time work year of 2080 hours) would be bi-weekly 80, semimonthly 86.67 and monthly 173.33.

Rule Detail Scrolling window

This window is used to define the tiers/thresholds used when indicating how many hours are considered overtime.

- **Hours From and Hours To** – These are used to define the range of hours.

In the illustration below:

Line 1 - Hours From 7.50 to Hours To 8.00 states that anything over 7.50 hours in a day but less than 8.00 hours would have an overtime hours payroll transaction created.

If a payroll transaction is entered for 7.50 hours, the system will not create an overtime transaction, as the transaction has not exceeded the Hours From range.

Line 2 - Hours From 8.00 to Hours To 999,999.99 states that anything over 8.00 hours in a day would have an overtime hours payroll transaction created.

When both ranges are specified and a user has worked 10.00 hours in a day. Two overtime payroll transactions will be created. One overtime payroll transaction is created for the 0.50 hours, which is between the first range of 7.50 and 8.00 hours. A second overtime payroll transaction is created for 2.00 hours, which is the remaining balance over 8 hours based from the second range of 8.00 and 999,999.99 hours.

NOTE: It is best practice to use 999,999.99 as the end of your highest range defined for a rule.

The system calculates differently if the user sets the range:

- Hours From 7.50 to Hours To 8.00
- Hours From 8.01 to Hours To 999,999.99

It is recommended if the Hours To for the first range is 8.00 the user begin the second range Hours From to 8.00 also, as illustrated below.

Hours From	Hours To	Use Code	Description
7.50	8.00	EXCESS	Unscheduled Time
8.01	999.99	OVER	Overtime Pay
0.00	0.00		

- **Use Code** – Tells the system which code to use when creating the overtime transactions for the ranges specified earlier.

For example, the code used to pay for hours between 7.5 and hours in a day may be different than the code used to pay for hours that are over 8 per day. Each range can have a different code.

- **Description** – Defaults from the Pay Code Setup window. It does not impact the calculation.
- **Pay Codes** – When calculating overtime hours the system needs to know which pay codes to include when counting and adding up hours. The user needs to specify which codes should be included and does this by inserting codes from the Available window to the Include window. Only pay codes which are of type hourly (or are of types Sick, Vacation or Holiday based on type hourly) are included in the Available window.

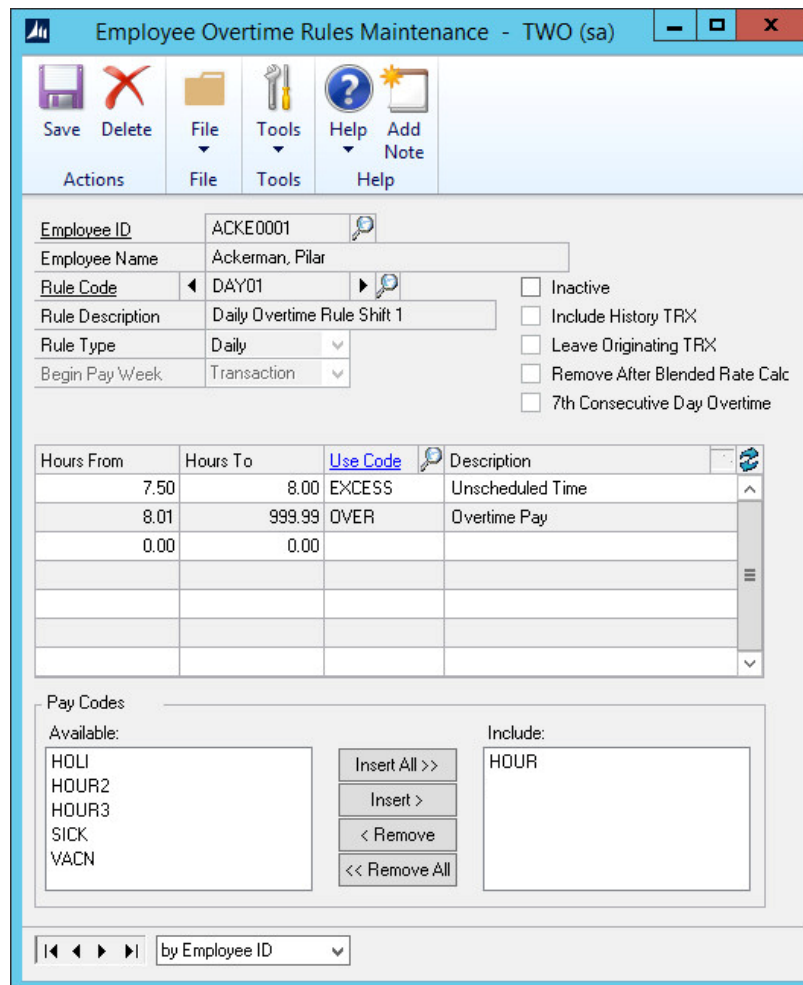
If the user receives an error message “[Only one default rule for this type may exist. Unmark previous default rule?](#)”; more detailed information and solution is provided in the Overtime Hours Rules [Messages](#) section.

Employee Overtime Rules Maintenance Window

Cards > Payroll > Overtime Rules

Cards > Payroll > Employee > GoTo > Payroll > Overtime Rules

The Employee Overtime Rules Maintenance window is used to adjust overtime rules to suit an individual employee's need, which will dictate the way overtime transactions are created in payroll. The window functions similarly to the [Overtime Rules Setup window](#) with only the following differences highlighted.



Employee ID – If the user accessed the Employee Overtime Rules Maintenance window from the GoTo menu in Employee Maintenance then this field will display the employee ID of the employee which was selected at the time it was accessed. Otherwise this field is empty and you must select an employee ID by typing the ID or use the lookup button to select an ID.

Employee Name – Displays the name of the employee whose employee ID is selected in the Employee ID field.

Rule Code – Select a rule code by typing the code or use the lookup button to select a rule code.

Inactive – Mark this box will prevent the rule from being used by the system when calculating overtime for this employee. If this box is checked AND the Rule code has been deactivated in Overtime Rules Setup as well, then you will be unable to reactivate the rule from this window. You will need to reactivate it in Overtime Rules Setup.

Include History TRX – Display from the [Overtime Rules Setup window](#).

Leave Originating TRX – Display from the [Overtime Rules Setup window](#).

Remove After Blended Rate Calc - Displays from the [Overtime Rules Setup window](#).

7th Consecutive Day Overtime - Displays from the [Overtime Rules Setup window](#).

Rule Description – Displays the description from the [Overtime Rules Setup window](#).

Rule Type – This field is read only in this window.

Rule Detail Scrolling window – This window is used to define the tiers/thresholds used when indicating how many hours are considered overtime.

Use Code – Although all codes of type Overtime and Double-Time are available to the user in the Use Code lookup, the use code specified must already be assigned to the employee as a pay code.

Sometimes a rule code record is rolled down to Employee Overtime Rules Maintenance from setup and contains a use code which this employee does not even have available to him.

For this reason, the system checks to make sure that the use code selected is one that the employee is eligible to use. It does this on the exit of the row in the scrolling window and again upon saving the record in general.

Nonetheless if a Use Code is ever specified which the employee does not have assigned, the Overtime Hours Rules process will ignore that particular line in the calculation process.

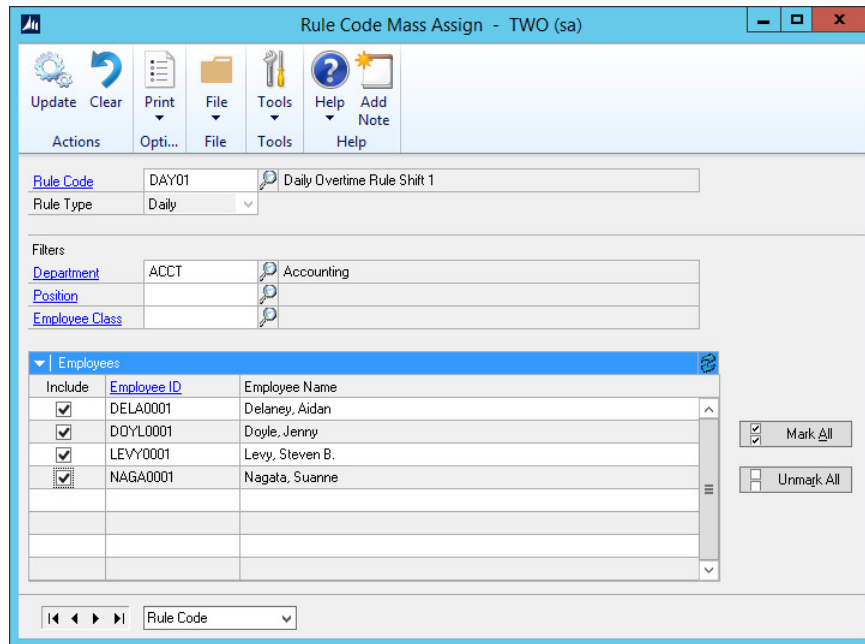
Pay Codes – At the employee overtime rules maintenance level the include codes will be checked by the system to make sure no duplicates are included in other rule codes of the same rule type.

If the user receives an error message “[You cannot activate a rule code for an employee when the rule code is inactive in setup.](#)”; more detailed information and solution is provided in the Overtime Hours Rules [Messages](#) section.

Rules Code Mass Assign Window

Microsoft Dynamics GP > Tools > Utilities > Payroll > Rule Code Mass Assign

The Rule Code Mass Assign window allows the user to assign Overtime Rule Codes to multiple employees at once.



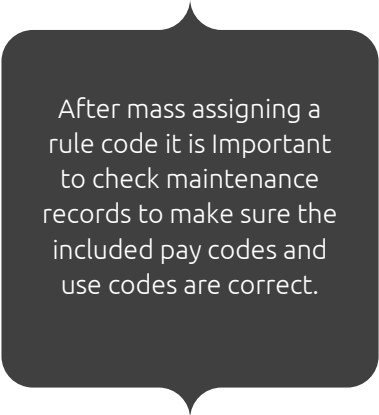
The first step is to select a Rule Code by typing the rule code or use the lookup field, which will be assigned to employees. The next step is to designate which employees in the scrolling window are to be assigned the rule code.

- **Rule Code** – When a rule code is selected, the rule type will then display for information purposes.
- **Filters** – When values are specified for Department, Position and Employee Class the system will display only the employees that meet those criteria in the scrolling window.
- **Mass Assign Scrolling window** – Allows the user to mark which employees should be assigned to selected rule code. To designate an employee simply check the include box in the scrolling window. The user can use the Mark All and Unmark All buttons.
- **Update Button** – This button executes the mass assignment process.

When mass assigning rule codes to employees it is important to keep in mind that a rule code may contain information that is not appropriate for the employee.

For example:

1. A rule code may contain a use code that the employee does not yet have. If this is the case the system will still assign the rule code to the employee. Any use codes that are invalid for that employee will not be assigned to the employee.
2. A rule code may also contain included pay codes that conflict with included pay codes that the employee has as part of an already existing rule code. If this is the case, the system will still assign the rule code to the employee but it will not assign the included codes that conflict with the previous rule code.



After mass assigning a rule code it is Important to check maintenance records to make sure the included pay codes and use codes are correct.

Overtime Hours Build Report

When a payroll build is completed the report will indicate if transactions were ignored. The system will ignore a transaction that would normally process if for some reason the pay code was altered and no longer was of type hourly (of type Sick, Vacation or Holiday based on type hourly).

Screen Output - Build Check File Report

File Edit Tools Find Help Debug

Print Send To Modify 100% Completed 1 Page

System: 01/01/1965 4:15:00 AM Dextordinary Inc. Page: 1
 User Date: 12/10/2004 CHECK FILE REPORT User ID: DEXTR
 U.S. Payroll

Employee ID	Name	Code	Description	Dept	Position	Shift	Pay Rate	Premium	Amount/Units
		State	Local	W/Comp	SUTA	Weeks	Days	Receipts	Batch ID
BARR0001	Barr, Adam								
Pay:	SALY Salary			ACCT	ADA		\$0.00		\$0.00
	WI			ILWCO2	IL	0.00	0.00		
	Reduced by 30.00 hours								
	SICKS Sick			ACCT	ADA				10.00
	WI			ILWCO2	IL	0.00	0.00		3165
***** Sick time pay hours exceed employee sick time available.							***** WARNING *****		
***** Overtime Hours Rules has excluded pay codes from the overtime hours calculation.							***** WARNING *****		
	VACNS Vacation			ACCT	ADA				9.00
	WI			ILWCO2	IL	0.00	0.00		3165
***** Vacation pay hours exceed employee vacation available.							***** WARNING *****		
***** Overtime Hours Rules has excluded pay codes from the overtime hours calculation.							***** WARNING *****		
	HOLIS Holiday			ACCT	ADA				11.00
	WI			ILWCO2	IL	0.00	0.00		3165
***** Overtime Hours Rules has excluded pay codes from the overtime hours calculation.							***** WARNING *****		
	State Tax: WI Wisconsin								
Total Employees:	1								

Scenarios

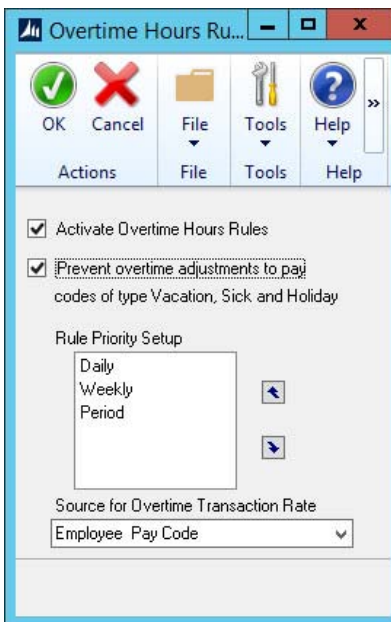
Example of Overtime Hours Rules with a Rule Priority Setup = Daily then Weekly then Period

In this example, we have assigned a daily, weekly and period rule to employee Pilar Ackerman. Pilar is an hourly employee paid biweekly and her pay codes in a standard workweek are: HOUR, HOUR2, HOUR3 and VACN.

The calculation priority for this example will process daily, weekly and then period rules. The tables below explain the automated process that creates the overtime transactions and adjusts the hourly transaction. The results of the automated calculation will appear on the Build report (see below).

Overtime Hours Rules Setup Window

Calculation Priority = Daily, Weekly then Period



Bi-Weekly Payroll Transactions

Week 1 Payroll Transactions					
Day of Week	Date	Pay Code	Department	Position	Hours
Sunday	03/26/2017	HOUR	ACCT	ADA	7.50
		HOUR2	ADMN	ADA	3.00
Monday	03/27/2017	HOUR	ACCT	ADA	8.00
Tuesday	03/28/2017	HOUR	ACCT	ADA	7.50
Wednesday	03/29/2017	VACN	ACCT	ADA	7.50
Thursday	03/30/2017	HOUR	ACCT	ADA	14.00
Friday	03/31/2017	HOUR3	ACCT	ADA	6.00
Saturday	04/01/2017	HOUR	ACCT	ADA	2.00
		HOUR2	ADMN	ADA	2.00
Week Total					57.50

Payroll Transaction Entry - TWO (sa)

Batch ID: BIWEEKLY

Transaction Defaults: Pay Period From: 4/12/2017, To: 4/12/2017, Days Worked: 0.00, Weeks Worked: 0.00

Data Entry Options: Current Options: No Options

TRX #	Employee ID	Employee Name	Trx Type	Code	Dept	Amount	Pay Rate
741	ACKE0001	Ackerman, Pilar	Pay Code	HOUR	ACCT	7.50	\$10.00
742	ACKE0001	Ackerman, Pilar	Pay Code	HOUR2	ADMN	3.00	\$11.00
743	ACKE0001	Ackerman, Pilar	Pay Code	HOUR	ACCT	8.00	\$10.00
744	ACKE0001	Ackerman, Pilar	Pay Code	HOUR	ACCT	7.50	\$10.00
745	ACKE0001	Ackerman, Pilar	Pay Code	VACA	ACCT	7.50	\$10.00
746	ACKE0001	Ackerman, Pilar	Pay Code	HOUR	ACCT	14.00	\$10.00
747	ACKE0001	Ackerman, Pilar	Pay Code	HOUR3	ACCT	6.00	\$13.00
748	ACKE0001	Ackerman, Pilar	Pay Code	HOUR	ACCT	2.00	\$10.00
749	ACKE0001	Ackerman, Pilar	Pay Code	HOUR2	ADMN	2.00	\$11.00
750	ACKE0001	Ackerman, Pilar	Pay Code	HOUR	ACCT	7.50	\$10.00
751	ACKE0001	Ackerman, Pilar	Pay Code	HOUR2	ADMN	3.00	\$11.00

Batch: BIWEEKLY 1 Employee, 11 Transactions

Week 2 Payroll Transactions					
Day of Week	Date	Pay Code	Department	Position	Hours
Sunday	04/02/2017	HOUR	ACCT	ADA	7.50
		HOUR2	ADMN	ADA	3.00
Monday	04/03/2017	HOUR	ACCT	ADA	8.00
Tuesday	04/04/2017	HOUR	ACCT	ADA	7.50
Wednesday	04/05/2017	VACN	ACCT	ADA	7.50
Thursday	04/06/2017	HOUR	ACCT	ADA	14.00
Friday	04/07/2017	HOUR3	ACCT	ADA	6.00
Saturday	04/08/2017	HOUR	ACCT	ADA	2.00
		HOUR2	ADMN	ADA	2.00
Week Total					57.50

Payroll Transaction Entry - TWO (sa)

Batch ID: BIWEEKLY BiWeekly

Transaction Defaults
 Pay Period From: 4/12/2017 Days Worked: 0.00
 To: 4/12/2017 Weeks Worked:

Data Entry Options
 Current Options: No Options

View: Transactions: by Order Entered

TRX #	Employee ID	Employee Name	Trx Type	Code	Dept	Amount	Pay Rate
741	ACKE0001	Ackerman, Pilar	Pay Code	HOUR	ACCT	2.00	\$10.00
742	ACKE0001	Ackerman, Pilar	Pay Code	HOUR2	ADMN	2.00	\$11.00
743	ACKE0001	Ackerman, Pilar	Pay Code	HOUR	ACCT	7.50	\$10.00
744	ACKE0001	Ackerman, Pilar	Pay Code	HOUR2	ADMN	3.00	\$11.00
745	ACKE0001	Ackerman, Pilar	Pay Code	HOUR	ACCT	8.00	\$10.00
746	ACKE0001	Ackerman, Pilar	Pay Code	HOUR	ACCT	7.50	\$10.00
747	ACKE0001	Ackerman, Pilar	Pay Code	VACA	ACCT	7.50	\$10.00
748	ACKE0001	Ackerman, Pilar	Pay Code	HOUR	ACCT	14.00	\$10.00
749	ACKE0001	Ackerman, Pilar	Pay Code	HOUR3	ACCT	6.00	\$13.00
750	ACKE0001	Ackerman, Pilar	Pay Code	HOUR	ACCT	2.00	\$10.00
751	ACKE0001	Ackerman, Pilar	Pay Code	HOUR2	ADMN	2.00	\$11.00

Batch: BIWEEKLY 1 Employee, 11 Transactions

Daily Rule (Day01)

As defined in the [Overtime Rules Setup](#) window:

- Hours From 8.00 to Hours To 10.00 will be calculated using the OVER pay code rate.
- Hours From 10.00 to Hours To 999,999.99 will be calculated using the DBL pay code rate.

Hours From	Hours To	Use Code	Description
8.00	10.00	OVER	Overtime Pay
10.01	999,999.99	DBL	Double Time
0.00	0.00		

DAILY: The system first summarizes the daily transactions then applies the daily rule for the transactions, with the results in the following table. Each transaction in a day might be slightly different based on the department, position, SUTA State and Worker's Comp.

Week 1 – Daily Rule Calculation Results					
Day of Week	Date	Pay Code	Department	Position	Hours
Sunday	3/26/2017	HOUR	ACCT	ADA	7.50
		HOUR2	ADMN	ADA	0.50
		OVER	ADMN	ADA	2.00
		DBL	ADMN	ADA	0.50
Monday	3/27/2017	HOUR	ACCT	ADA	8.00
Tuesday	3/28/2017	HOUR	ACCT	ADA	7.50
Wednesday	3/29/2017	VACN	ACCT	ADA	7.50
Thursday	3/30/2017	HOUR	ACCT	ADA	8.00
		OVER	ACCT	ADA	2.00
		DBL	ACCT	ADA	4.00
Friday	3/31/2017	HOUR3	ACCT	ADA	6.00
Saturday	4/1/2017	HOUR	ACCT	ADA	2.00
		HOUR2	ADMN	ADA	2.00

Week 2 – Daily Rule Calculation Results					
Day of Week	Date	Pay Code	Department	Position	Hours
Sunday	04/02/2017	HOUR	ACCT	ADA	7.50
		HOUR2	ADMN	ADA	0.50
		OVER	ADMN	ADA	2.00
		DBL	ADMN	ADA	0.50
Monday	04/03/2017	HOUR	ACCT	ADA	8.00
Tuesday	04/04/2017	HOUR	ACCT	ADA	7.50
Wednesday	04/05/2017	VACN	ACCT	ADA	7.50
Thursday	04/06/2017	HOUR	ACCT	ADA	8.00
		OVER	ACCT	ADA	2.00
		DBL	ACCT	ADA	4.00
Friday	04/07/2017	HOUR3	ACCT	ADA	6.00
Saturday	04/08/2017	HOUR	ACCT	ADA	2.00
		HOUR2	ADMN	ADA	2.00

For information such as SUTA State and Worker's Comp, the system uses the details from the Employee Pay Code Maintenance window to determine the appropriate SUTA State and Worker's Comp.

Weekly Rule (Week1)

As defined in the [Overtime Rules Setup](#) window:

- Hours From 40 to Hours To 999,999.99 will be calculated using the OVER pay code rate.

Overtime Rules Setup - TWO (sa)

Save Delete File Tools Help Add Note

Actions File Tools Help

Rule Code WEEKLY Default Inactive
Rule Description Weekly Overtime Rules Include History TRX
Rule Type Weekly Leave Originating TRX
Begin Pay Week Transaction Remove After Blended Rate Calc
 7th Consecutive Day Overtime

Hours From	Hours To	Use Code	Description
40.00	999,999.99	OVER	Overtime Pay
0.00	0.00		

Pay Codes

Available: HOLI, SICK

Include: HOUR, HOUR2, HOUR3, VACN

Insert All >> Insert > < Remove << Remove All

Rule Code

Week 1 – Results from Daily Rule to be used for Weekly Rule calculation

Day of Week	Date	Pay Code	Department	Position	Hours
Sunday	3/26/2017	HOUR	ACCT	ADA	7.50
		HOUR2	ADMN	ADA	0.50
		OVER	ADMN	ADA	2.00
		DBL	ADMN	ADA	0.50
Monday	3/27/2017	HOUR	ACCT	ADA	8.00
Tuesday	3/28/2017	HOUR	ACCT	ADA	7.50
Wednesday	3/29/2017	VACN	ACCT	ADA	7.50
Thursday	3/30/2017	HOUR	ACCT	ADA	8.00
		OVER	ACCT	ADA	2.00
		DBL	ACCT	ADA	4.00
Friday	3/31/2017	HOUR3	ACCT	ADA	6.00
Saturday	4/1/2017	HOUR	ACCT	ADA	2.00
		HOUR2	ADMN	ADA	2.00

Week 2 – Results from Daily Rule to be used for Weekly Rule calculation					
Day of Week	Date	Pay Code	Department	Position	Hours
Sunday	04/02/2017	HOUR	ACCT	ADA	7.50
		HOUR2	ADMN	ADA	0.50
		OVER	ADMN	ADA	2.00
		DBL	ADMN	ADA	0.50
Monday	04/03/2017	HOUR	ACCT	ADA	8.00
Tuesday	04/04/2017	HOUR	ACCT	ADA	7.50
Wednesday	04/05/2017	VACN	ACCT	ADA	7.50
Thursday	04/06/2017	HOUR	ACCT	ADA	8.00
		OVER	ACCT	ADA	2.00
		DBL	ACCT	ADA	4.00
Friday	04/07/2017	HOUR3	ACCT	ADA	6.00
Saturday	04/08/2017	HOUR	ACCT	ADA	2.00
		HOUR2	ADMN	ADA	2.00

WEEKLY: Based on the Priority Rule setup the system will calculate daily, weekly then period. The system applied the daily rule and now the system will determine if the weekly rule needs to be calculated. The weekly rule states that 40 hours and over should use the OVER pay code rate.

After applying the daily rule, the non-overtime transactions now add up to 49 hours. This leaves nine hours of overtime which was not accounted for in the daily rules. So we can expect the system to generate nine hours of overtime and reduced the non-overtime hours accordingly.

The following illustrates how the system handles the transactions. Note that overtime for the week is credited at the point during the week which the employee exceeds the threshold; in this case Friday after the first hour of the day.

Week 1 – Weekly Rule Calculation Results

Day of Week	Date	Pay Code	Department	Position	Hours
Sunday	3/26/2017	HOUR	ACCT	ADA	7.50
		HOUR2	ADMN	ADA	0.50
		OVER	ADMN	ADA	2.00
		DBL	ADMN	ADA	0.50
Monday	3/27/2017	HOUR	ACCT	ADA	8.00
Tuesday	3/28/2017	HOUR	ACCT	ADA	7.50
Wednesday	3/29/2017	VACN	ACCT	ADA	7.50
Thursday	3/30/2017	HOUR	ACCT	ADA	8.00
		OVER	ACCT	ADA	2.00
		DBL	ACCT	ADA	4.00
Friday	3/31/2017	HOUR3	ACCT	ADA	1.00
		OVER	ACCT	ADA	5.00
Saturday	4/1/2017	HOUR	ACCT	ADA	0.00
		HOUR2	ADMN	ADA	0.00
		OVER	ACCT	ADA	2.00
		OVER	ADMN	ADA	2.0

Week 2 – Weekly Rule Calculation Results					
Day of Week	Date	Pay Code	Department	Position	Hours
Sunday	04/02/2017	HOUR	ACCT	ADA	7.50
		HOUR2	ADMN	ADA	0.50
		OVER	ADMN	ADA	2.00
		DBL	ADMN	ADA	0.50
Monday	04/03/2017	HOUR	ACCT	ADA	8.00
Tuesday	04/04/2017	HOUR	ACCT	ADA	7.50
Wednesday	04/05/2017	VACN	ACCT	ADA	7.50
Thursday	04/06/2017	HOUR	ACCT	ADA	8.00
		OVER	ACCT	ADA	2.00
		DBL	ACCT	ADA	4.00
Friday	3/31/2017	HOUR3	ACCT	ADA	1.00
		OVER	ACCT	ADA	5.00
Saturday	04/08/2017	HOUR	ACCT	ADA	0.00
		HOUR2	ADMN	ADA	0.00
		OVER	ACCT	ADA	2.00
		OVER	ADMN	ADA	2.00

Period (PER1)

As defined in the [Overtime Rules Setup](#) window:

- Hours From 90 to Hours TO 999,999.99 will be calculated using the DBL pay code rate.

Overtime Rules Setup - TWO (sa)

Save Delete File Tools Help Add Note

Actions File Tools Help

Rule Code PER1 Default Inactive
Rule Description Period Include History TRX
Rule Type Period Leave Originating TRX
Begin Pay Week Transaction Remove After Blended Rate Calc
 7th Consecutive Day Overtime

Hours From	Hours To	Use Code	Description
90.00	999,999.99	DBL	Double Time
0.00	0.00		

Pay Codes

Available: HOLI, SICK

Include: HOUR, HOUR2, HOUR3, VACN

Insert All >> Insert > < Remove << Remove All

Navigation: |<< < > >>| Rule Code

Week 1 – Results from Daily, Weekly Rules to be used for Period Rule calculation					
Day of Week	Date	Pay Code	Department	Position	Hours
Sunday	3/26/2017	HOUR	ACCT	ADA	7.50
		HOUR2	ADMN	ADA	0.50
		OVER	ADMN	ADA	2.00
		DBL	ADMN	ADA	0.50
Monday	3/27/2017	HOUR	ACCT	ADA	8.00
Tuesday	3/28/2017	HOUR	ACCT	ADA	7.50
Wednesday	3/29/2017	VACN	ACCT	ADA	7.50
Thursday	3/30/2017	HOUR	ACCT	ADA	8.00
		OVER	ACCT	ADA	2.00
		DBL	ACCT	ADA	4.00
Friday	3/31/2017	HOUR3	ACCT	ADA	1.00
		OVER	ACCT	ADA	5.00
Saturday	4/1/2017	HOUR	ACCT	ADA	0.00
		HOUR2	ADMN	ADA	0.00
		OVER	ACCT	ADA	2.00
		OVER	ADMN	ADA	2.0

Week 2 – Results from Daily, Weekly Rules to be used for Period Rule calculation					
Day of Week	Date	Pay Code	Department	Position	Hours
Sunday	04/02/2017	HOUR	ACCT	ADA	7.50
		HOUR2	ADMN	ADA	0.50
		OVER	ADMN	ADA	2.00
		DBL	ADMN	ADA	0.50
Monday	04/03/2017	HOUR	ACCT	ADA	8.00
Tuesday	04/04/2017	HOUR	ACCT	ADA	7.50
Wednesday	04/05/2017	VACN	ACCT	ADA	7.50
Thursday	04/06/2017	HOUR	ACCT	ADA	8.00
		OVER	ACCT	ADA	2.00
		DBL	ACCT	ADA	4.00
Friday	3/31/2017	HOUR3	ACCT	ADA	1.00
		OVER	ACCT	ADA	5.00
Saturday	04/08/2017	HOUR	ACCT	ADA	0.00
		HOUR2	ADMN	ADA	0.00
		OVER	ACCT	ADA	2.00
		OVER	ADMN	ADA	2.00

PERIOD: Based on the Priority Rule setup the system will calculate daily, weekly then period. The system applied the daily and weekly rules and now the system will determine if the period rule needs to be calculated. The period rule states that 90 hours and over should use the DBL pay code rate.

After applying the daily and weekly rules, the remaining non-overtime transactions now add up to 40 hours for the week that would be 80 hours for the period since the build contained two weeks' worth of transactions. **No thresholds are exceeded** so there are no modifications for the period rule.

Build Report

This Build Report reflects the results after the overtime rules have been applied. The OVER and DBL transactions have been added and the hourly transactions were reduced.

Employee ID		Name		Dept		Position		Shift		Pay Rate		Premium		Amount/Units	
State	Local	W/Comp	SUTA	Weeks	Days	Receipts	Batch ID								
System: 4/6/2010 11:59:19 AM Fabrikam, Inc. Page: 1															
User Date: 4/12/2017 CHECK FILE REPORT User ID: sa															
U.S. Payroll															
Employee ID Name															
ACKE0001 Ackerman, Pilar															
Pay:	HOURLY	Hourly	ACCT	ADA						\$8.00				7.50	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	HOURLY	Hourly	ACCT	ADA						\$8.00				8.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	HOURLY	Hourly	ACCT	ADA						\$8.00				7.50	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	HOURLY	Hourly	ACCT	ADA						\$8.00				8.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	HOURLY	Hourly	ACCT	ADA						\$8.00				0.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	HOURLY	Hourly	ACCT	ADA						\$8.00				7.50	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	HOURLY	Hourly	ACCT	ADA						\$8.00				8.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	HOURLY	Hourly	ACCT	ADA						\$8.00				0.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	HOURLY	Hourly	ACCT	ADA						\$0.00				0.50	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	HOURLY	Hourly	ACCT	ADA						\$0.00				0.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	HOURLY	Hourly	ACCT	ADA						\$0.00				0.50	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	HOURLY	Hourly	ACCT	ADA						\$0.00				0.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	HOURLY	Hourly	ACCT	ADA						\$10.00				1.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	HOURLY	Hourly	ACCT	ADA						\$10.00				1.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	DBL	Overtime	ACCT	ADA						\$0.00				0.50	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	DBL	Overtime	ACCT	ADA						\$16.00				4.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	DBL	Overtime	ACCT	ADA						\$0.00				0.50	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	DBL	Overtime	ACCT	ADA						\$16.00				4.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	OVER	Overtime	ACCT	ADA						\$0.00				2.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	OVER	Overtime	ACCT	ADA						\$0.00				2.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	OVER	Overtime	ACCT	ADA						\$0.00				5.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	OVER	Overtime	ACCT	ADA						\$0.00				2.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	OVER	Overtime	ACCT	ADA						\$0.00				2.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	OVER	Overtime	ACCT	ADA						\$0.00				2.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	OVER	Overtime	ACCT	ADA						\$0.00				2.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	OVER	Overtime	ACCT	ADA						\$0.00				5.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	OVER	Overtime	ACCT	ADA						\$0.00				2.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	OVER	Overtime	ACCT	ADA						\$0.00				2.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	OVER	Overtime	ACCT	ADA						\$0.00				2.00	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	VACA	Vacation	ACCT	ADA						\$0.00				7.50	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
	VACA	Vacation	ACCT	ADA						\$0.00				7.50	
	IL		ILWCO1	IL	0.00	0.00							BIWEEKLY		
Benefit:	401K	401(K)									5.00%				
	INS	Insurance Premium								\$49.36					
Deduction:	401K	401(k) Deduction									3.00%				
	INS2	Insurance (family coverage)								\$72.95					
	MED	Medical Flex								\$20.00					
State Tax:	IL	Illinois													
Total Employees:	1														

Hints and Essentials

Important Notes:

1. When using both Microsoft Payroll Extensions Overtime Rate Manager and Overtime Hours Rules functionality, the OHR6489.dic file must be referenced prior to the HRMSS.dic file in the users Dynamics.set file.
2. When using both Comprehensive Leave Manager and Overtime Hours Rules, the OHR6489.dic file must be referenced prior to the ELM.dic file in the users Dynamics.set file.
3. When using both Negative Payroll Transactions and Overtime Hours Rules, Negative Payroll Transactions must be entered into the system on the beginning date of the transactions.
4. If an employee is assigned an overtime rule that contains a use code for overtime transaction which is inactive or not assigned to the employee; the system will not process an overtime transaction for the tier that contains that use code.
5. If the user inactivates a rule, which is designated as a default rule, then that rule will not be used in the overtime rules calculation process. This will impact all users who use only the default rule.
6. When an overtime rule contains multiple tiers and the system processes overtime for multiple tiers then the overtime transaction that is created will inherit the demographic information from the originating transaction and Employee Pay Code Maintenance.
7. Inactive rule codes assigned to employees will prevent other rule codes from being assigned that have the same included codes. Therefore it is important not to accumulate inactive codes for an employee as they will eventually cause conflicts with new rules being assigned.

FAQ's

Can you have multiple overtime rules assigned to an employee? For example, overtime is anything over 8 hours in a day or over 40 hours in a week.

Yes, you may assign multiple overtime rules to an employee.

If you want to have one of each rule type apply to all employees do you have to assign each employee the Overtime Rules?

Overtime Hours Rules will allow the user to set a default rule for each rule type. The default rules will be applied to all employees who do not have an overtime rule assigned.

Is Overtime Hours Rules supported for bi-monthly or monthly payrolls?

No, Overtime Hours Rules supports only weekly or bi-weekly payrolls.

Activation Manager Messages

Activation Failed: Trial invalid or trial period expired

Situation: The trial period has expired for the product.

Solution: Contact sales@integrity-data.com and request additional trial period or purchase the product.

Activation Failed: Site name does not match this installation

Situation: The site name does not match the token which was issued.

Solution: Send support@integrity-data.com a screenshot of the Activation Manager window with the error message displayed so the token can be updated with the correct site name.

Activation Failed: Product Name does not match this installation

Situation: The product name does not match the token which was issued for a product.

Solution: Send support@integrity-data.com a screenshot of the Activation Manager window with the error message displayed so the token can be updated with the correct site name.

Trial period for Overtime Hours Rules has expired

Situation: The trial period has expired for the product.

Solution: Contact sales@integrity-data.com and request additional trial period or purchase the product.

Employees Allowed has been exceeded

Situation: The current employee count has exceeded the employees allowed.

Solution: Contact sales@integrity-data.com to upgrade to the next tier.

Activation Failed: Unable to contact web service. Activate manually or revert to previous product dictionary

Situation: The system could not make a connection to the web service.

Solution: Contact support@integrity-data.com for assistance.

Activation Failed: Product has been deactivated

Situation: The product has been deactivated.

Solution: Contact support@integrity-data.com for assistance.

Upgrade Failed: Enhancement Plan period expired. Renew Enhancement Plan or revert to previous product version.

Situation: User attempted to upgrade a product when their enhancement plan was expired.

Solution: Contact sales@integrity-data.com to renew the enhancement plan.

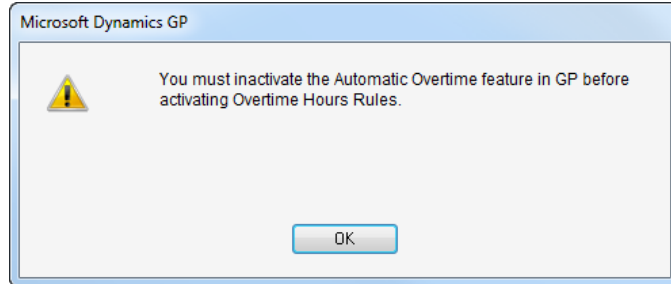
Overtime Hours Rules: Activation Failed

Situation: Communication breakdown between the user machine and Integrity Data.

Solution: Contact support@integrity-data.com for assistance.

Overtime Hours Rules Messages

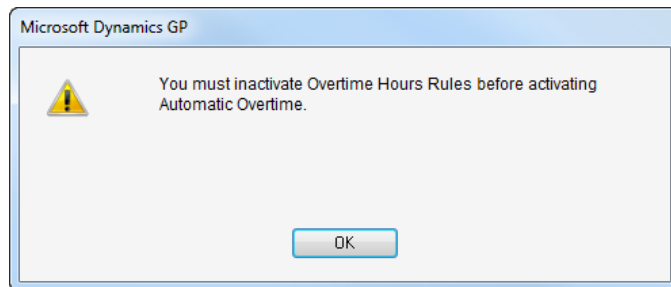
You must inactivate the Automatic Overtime feature in GP before activating Overtime Hours Rules. OK



Situation: User attempted to activate the Overtime Hours Rules feature while the Automatic Overtime feature was enabled in GP.

Solution: Inactivate Automatic Overtime feature. (Microsoft Dynamics GP > Tools > Setup > Payroll > Payroll)

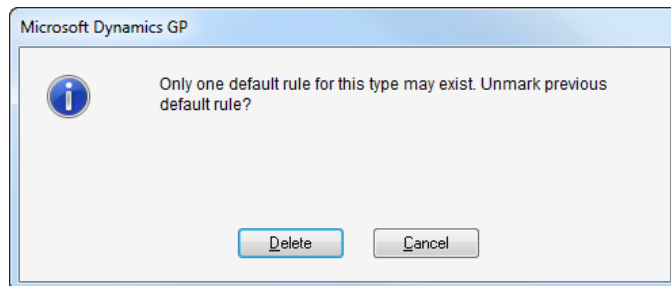
You must inactivate Overtime Hours Rules before activating Automatic Overtime. OK



Situation: The user attempted to check the Automatic Overtime checkbox while Overtime Hours Rules functionality was activated.

Solution: Open the [Overtime Rules Setup window](#) and unmark Activate Overtime Hours Rules.

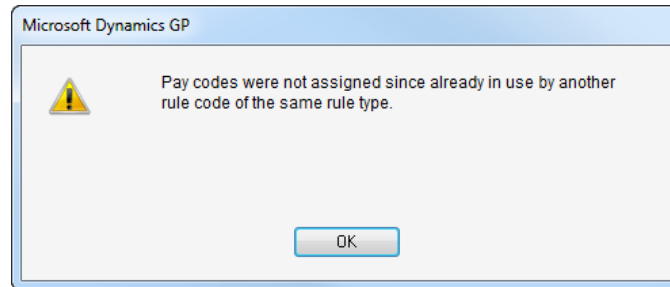
Only one default rule for this type may exist. Unmark previous default rule? Delete Cancel



Situation: User attempted to mark a rule record as default when another rule record was selected as default for same record type.

Solution: Delete this current rule and unmark the previous default rule.

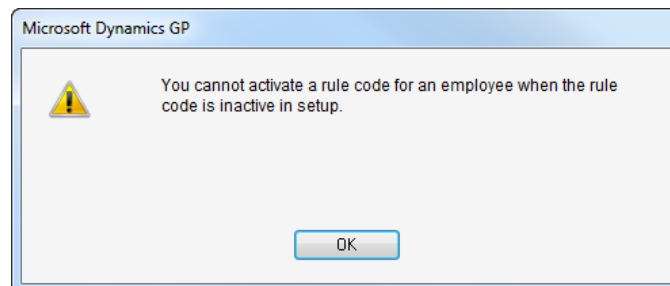
Pay codes were not assigned since already in use by another rule code of the same rule type. OK



Situation: User attempted to save a record that contained pay codes already in use by another rule code belonging to the same rule type.

Solution: Remove pay codes from the other rule type.

You cannot activate a rule code for an employee when the rule code is inactive in setup. OK



Situation: User attempted to enter an inactive rule code.

Solution: Make the rule code active or select an active rule code.

Deactivate Product

There are three ways to deactivate the Overtime Hours Rules; disable, inactive or uninstall.

Disable

To disable Overtime Hours Rules without having to exit Microsoft Dynamics GP, open the Customization Status window. To open this window, select the Microsoft Dynamics GP menu, point to Tools, select Customize and then click Customization Status. Select the product from the list and click Disable. The product can be enabled by closing and reopening Microsoft Dynamics GP.

Inactivate

Option 1: Overtime Hours Rules can be inactivated by company, open the [Activation Manager window](#) and unmark the company checkbox.

Option 2: Overtime Hours Rules can be inactivated by opening the [Overtime Hours Rules Setup window](#) and unmarking the Activate Overtime Hours rules checkbox. To open this window, select the Microsoft Dynamics GP menu, select Tools, select Setup, select Payroll and then select Overtime Hours Rules Setup.

Uninstall

If Overtime Hours Rules needs to be uninstalled complete these steps on the server and the client where Overtime Hours Rules has been installed.

1. Remove the OHR6489.DIC file from the Runtime Directory
Default location is C:\Program Files\Microsoft Dynamics\GP2015
2. Make a copy of the Dynamics.set file
3. Open the Dynamics.set file
 - a. Decrease the top number by one:
For example, if the top number is 21 change it to 20
 - b. Remove the following lines from the Dynamics.set file:
6489
Overtime Hours Rules
:C:\Program Files\Microsoft Dynamics\GP\OHR6489.DIC
:C:\Program Files\Microsoft Dynamics\GP\Data\OHR6489F.DIC
:C:\Program Files\Microsoft Dynamics\GP\Data\OHR6489R.DIC
4. Save the Dynamics.set file
5. Launch Microsoft Dynamics GP and login as the 'system administrator'

Contact Information

Get quick answers to your questions

[Browse our convenient Knowledge Base](#) for up-to-date answers to the most common questions. For additional questions, please contact your authorized Value Added Reseller (VAR) for support on this product. Or, contact Integrity Data by emailing support@integrity-data.com or calling 888.786.6162 x0220 or x0221.

If you have registered your product, Technical Customer Service is available for any customers with a current Enhancement Plan. Please have your Site Name available. Your first line of support should always be your VAR.

Rate us and our products

Are you pleased with your experience with us and our products? Provide a quote and get a gift card! Visit integrity-data.com/testimonials/.

Suggest new features or improvements

User input into improving this product and constructive feedback are appreciated. Please e-mail Tom, our Product Manager, at tfranz@integrity-data.com. As always, technical ideas and user input are highly encouraged. At Integrity Data, we want to hear your input, so drop us a line!

Browse our solutions

The Integrity Data website is a great place to get additional information on products and services. The following information is available on our website:

- Integrity Data's [HR & Payroll Add-on pages](#) include Demos, Features and Benefits, and ROI Calculators
- Use [our catalog](#) to quickly browse our products or forward to a colleague
- Purchase products or calculate pricing at our [online store](#)
- Visit our Services page to learn more about our additional customization services

If you would like to discuss your needs with a Sales Account Executive, please call 888.786.6162 or e-mail sales@integrity-data.com.

Manual install

If the user encounters errors during the installation, complete the following steps to manually install Overtime Hours Rules:

- Contact support@integrity-data.com to receive the manual install files for the product(s).
- Copy and paste the files into the appropriate locations.