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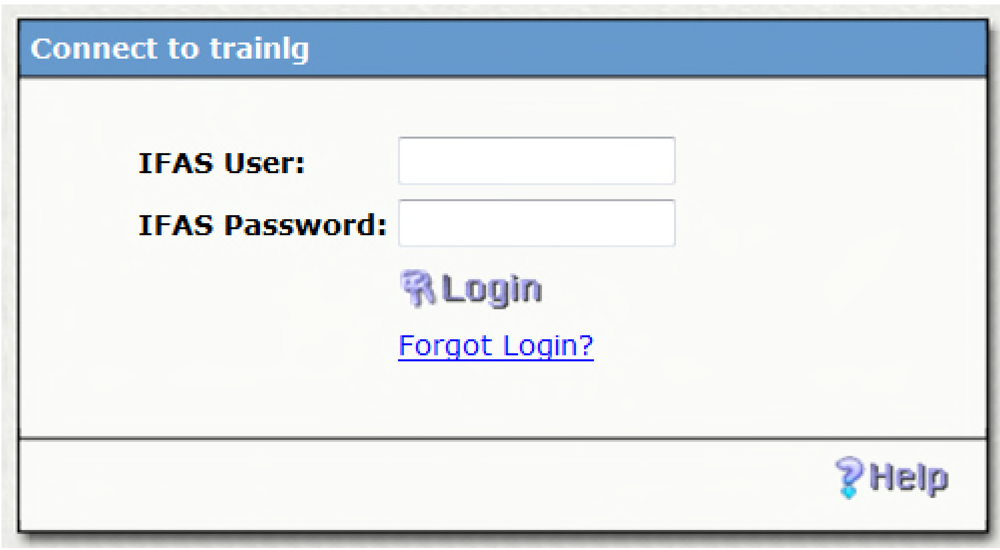
Section 1: Employee Online User Manual - Employee

Employee Online is a web-based system that enables you, the employee, to easily access your personnel and payroll records. Your organization may grant permission to you to modify some of the records. The interactive nature of Employee Online enables end users to have better access to, and greater input into, their employment records.

1. Enter your user name and password



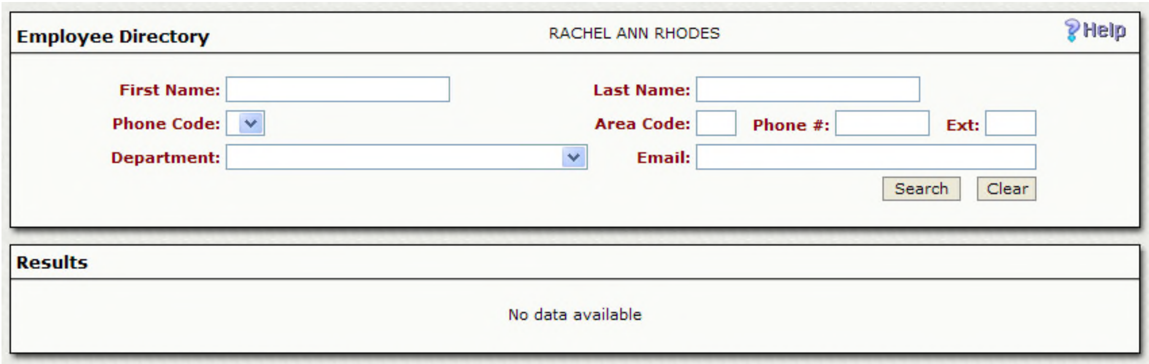
2. Select Login, you will then see the "Welcome Page"

- The Welcome Page will present you with a welcome message that your organization may update with details as well as instructions on how to use Employee Online.

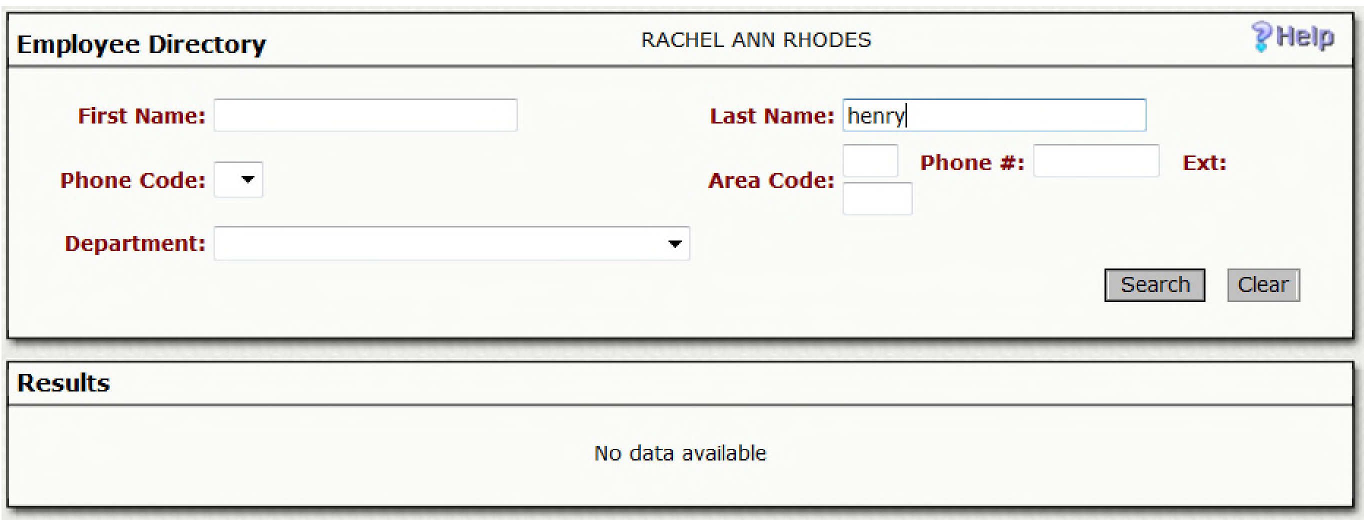
- The left side of the screen is the menu option which lists all of the different links that you may select to access your HR and Payroll records. Each bullet item is a link that will take you to a page with more information, simply click on the clink to navigate.

- Your organization may have changed the order of the menu links

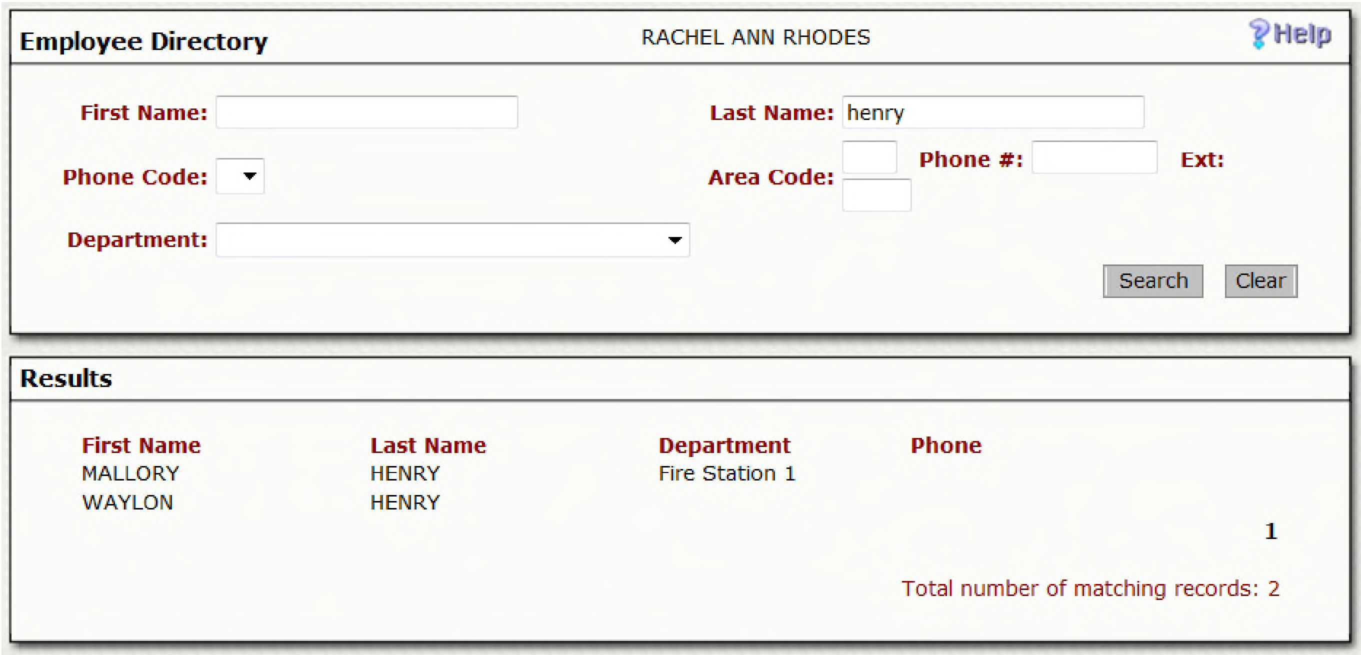
3. **Employee Directory**: A tool that allows you to look up employee's work telephone number and/or e-mail address.



- To search for an employee, enter your search criteria, you may search my First Name, Last Name, Phone Code or Department



  - If you are unsure on how to spell an employee's First or Last Name, you may enter a portion of the name and use an (*) as a wildcard.
    - Example: When searching for Ham*, your results would list all employee's with last names starting with Ham.
- Select Search to filter down your results


Employee Directory RACHEL ANN RHODES Help

First Name:
Last Name: henry
Phone Code:
Area Code:
Phone #:
Ext:
Department:
Search Clear

Results

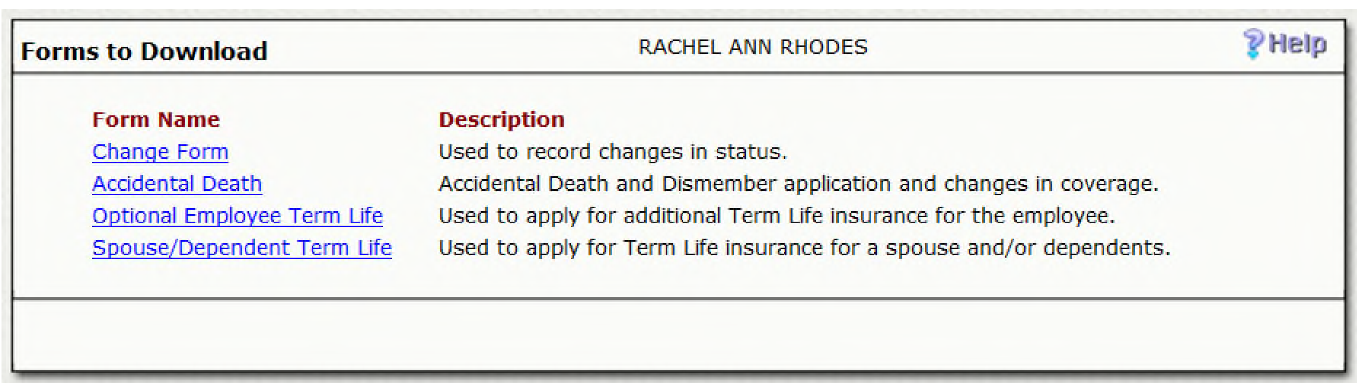
First Name	Last Name	Department	Phone
MALLORY	HENRY	Fire Station 1	
WAYLON	HENRY		

1

Total number of matching records: 2

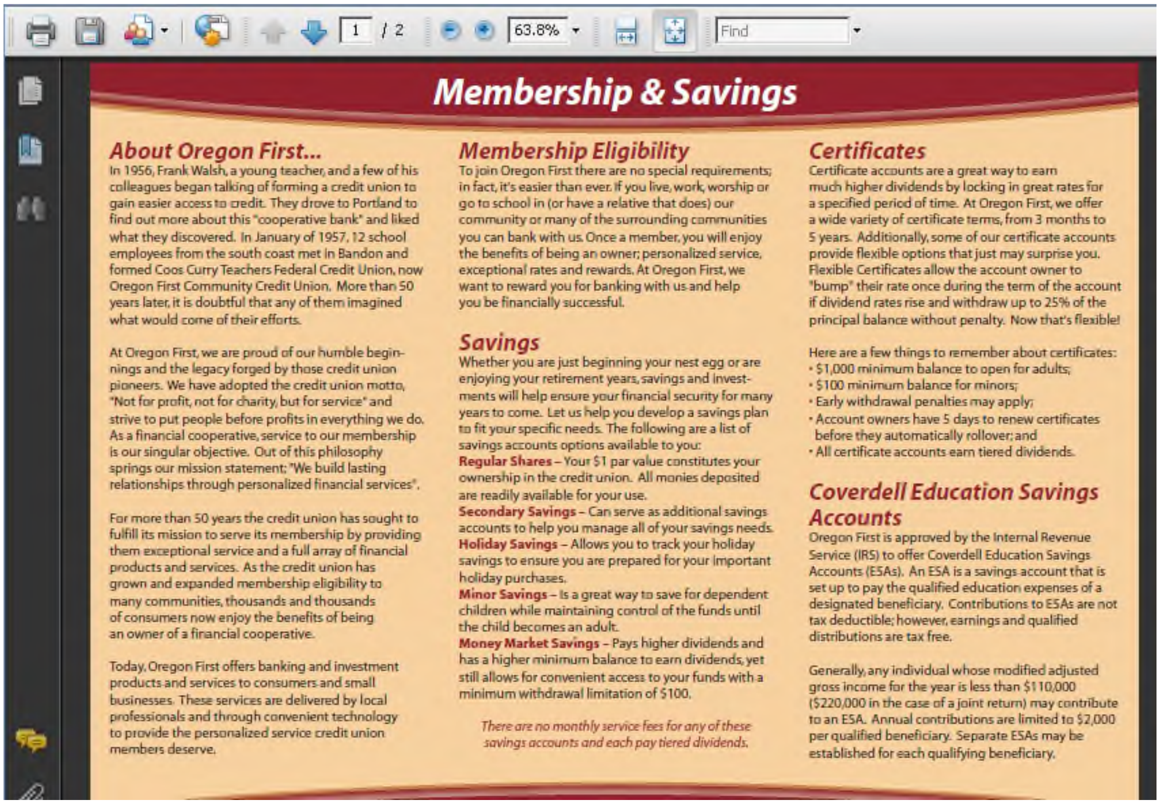
- To start over, you may select Clear or enter new selection criteria.

4. **Forms**: Your organization may either save all forms in one centralized area in this section of Employee Online.


Forms to Download RACHEL ANN RHODES Help

Form Name	Description
Change Form	Used to record changes in status.
Accidental Death	Accidental Death and Dismember application and changes in coverage.
Optional Employee Term Life	Used to apply for additional Term Life insurance for the employee.
Spouse/Dependent Term Life	Used to apply for Term Life insurance for a spouse and/or dependents.

- Select the form that you would like to print
- This will open the form in a PDF format, you may now select the print icon



Membership & Savings

About Oregon First...

In 1956, Frank Walsh, a young teacher, and a few of his colleagues began talking of forming a credit union to gain easier access to credit. They drove to Portland to find out more about this "cooperative bank" and liked what they discovered. In January of 1957, 12 school employees from the south coast met in Bandon and formed Coos Curry Teachers Federal Credit Union, now Oregon First Community Credit Union. More than 50 years later, it is doubtful that any of them imagined what would come of their efforts.

At Oregon First, we are proud of our humble beginnings and the legacy forged by those credit union pioneers. We have adopted the credit union motto, "Not for profit, not for charity, but for service" and strive to put people before profits in everything we do. As a financial cooperative, service to our membership is our singular objective. Out of this philosophy springs our mission statement: "We build lasting relationships through personalized financial services".

For more than 50 years the credit union has sought to fulfill its mission to serve its membership by providing them exceptional service and a full array of financial products and services. As the credit union has grown and expanded membership eligibility to many communities, thousands and thousands of consumers now enjoy the benefits of being an owner of a financial cooperative.

Today, Oregon First offers banking and investment products and services to consumers and small businesses. These services are delivered by local professionals and through convenient technology to provide the personalized service credit union members deserve.

Membership Eligibility

To join Oregon First there are no special requirements; in fact, it's easier than ever. If you live, work, worship or go to school in (or have a relative that does) our community or many of the surrounding communities you can bank with us. Once a member, you will enjoy the benefits of being an owner; personalized service, exceptional rates and rewards. At Oregon First, we want to reward you for banking with us and help you be financially successful.

Savings

Whether you are just beginning your nest egg or are enjoying your retirement years, savings and investments will help ensure your financial security for many years to come. Let us help you develop a savings plan to fit your specific needs. The following are a list of savings accounts options available to you:
Regular Shares – Your $1 par value constitutes your ownership in the credit union. All monies deposited are readily available for your use.
Secondary Savings – Can serve as additional savings accounts to help you manage all of your savings needs.
Holiday Savings – Allows you to track your holiday savings to ensure you are prepared for your important holiday purchases.
Minor Savings – Is a great way to save for dependent children while maintaining control of the funds until the child becomes an adult.
Money Market Savings – Pays higher dividends and has a higher minimum balance to earn dividends, yet still allows for convenient access to your funds with a minimum withdrawal limitation of $100.

There are no monthly service fees for any of these savings accounts and each pay tiered dividends.

Certificates

Certificate accounts are a great way to earn much higher dividends by locking in great rates for a specified period of time. At Oregon First, we offer a wide variety of certificate terms, from 3 months to 5 years. Additionally, some of our certificate accounts provide flexible options that just may surprise you. Flexible Certificates allow the account owner to "bump" their rate once during the term of the account if dividend rates rise and withdraw up to 25% of the principal balance without penalty. Now that's flexible!

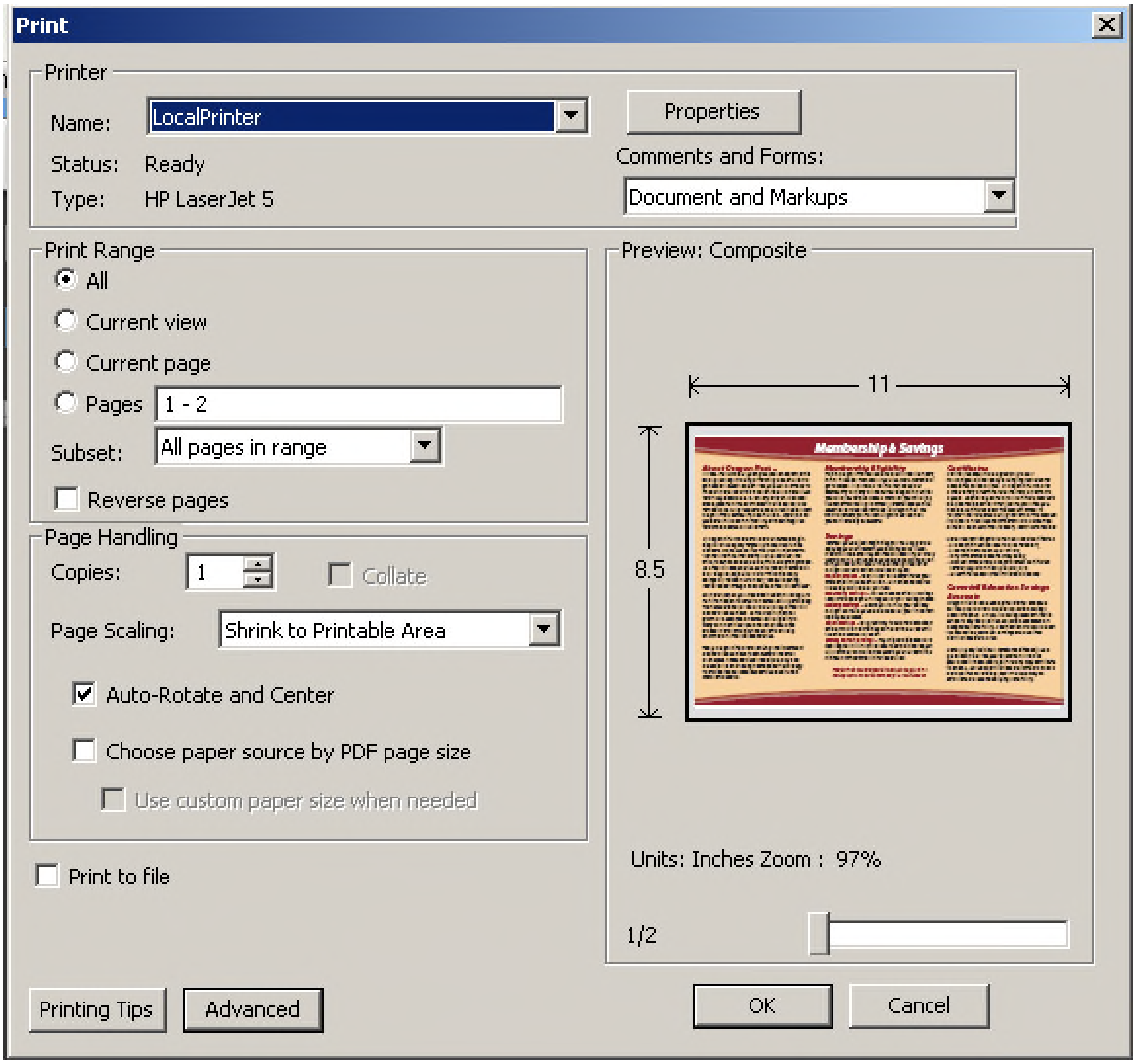
Here are a few things to remember about certificates:
- $1,000 minimum balance to open for adults;
- $100 minimum balance for minors;
- Early withdrawal penalties may apply;
- Account owners have 5 days to renew certificates before they automatically rollover; and
- All certificate accounts earn tiered dividends.

Coverdell Education Savings Accounts

Oregon First is approved by the Internal Revenue Service (IRS) to offer Coverdell Education Savings Accounts (ESAs). An ESA is a savings account that is set up to pay the qualified education expenses of a designated beneficiary. Contributions to ESAs are not tax deductible; however, earnings and qualified distributions are tax free.

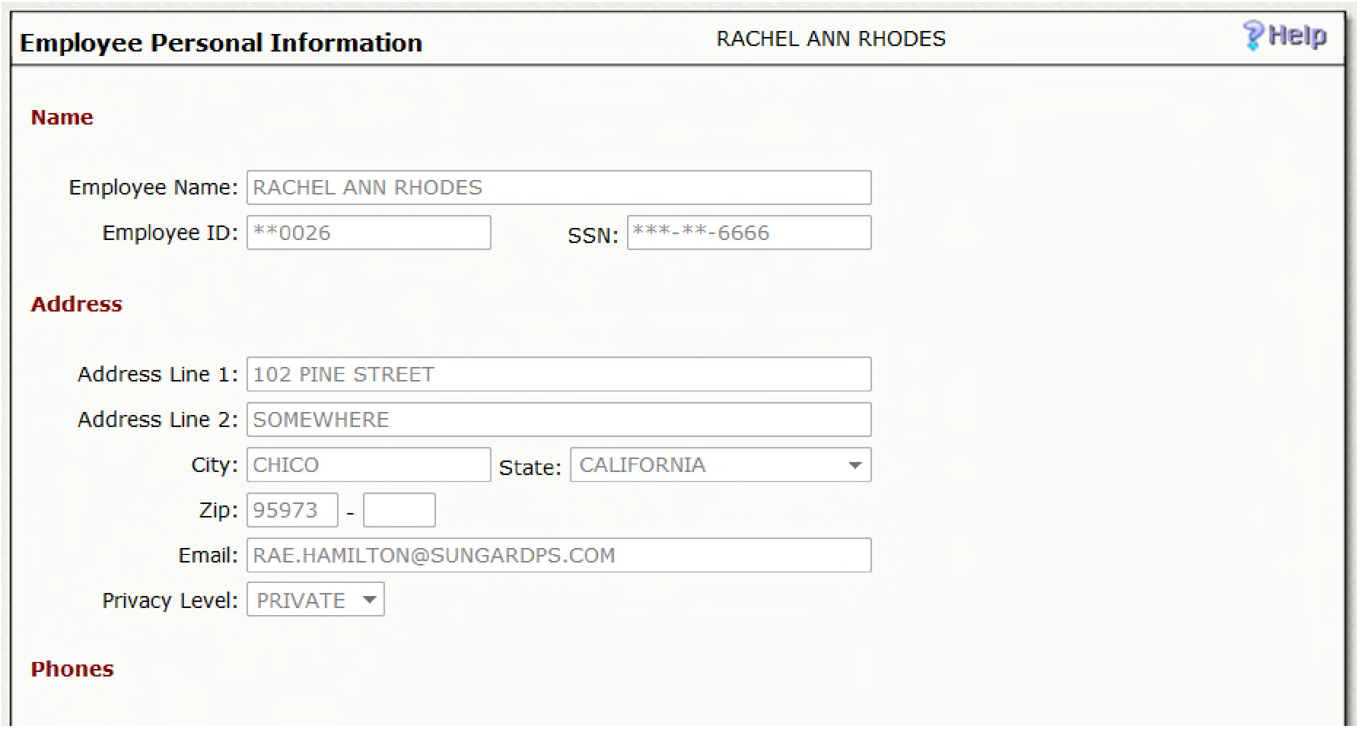
Generally, any individual whose modified adjusted gross income for the year is less than $110,000 ($220,000 in the case of a joint return) may contribute to an ESA. Annual contributions are limited to $2,000 per qualified beneficiary. Separate ESAs may be established for each qualifying beneficiary.

- Select the correct printer



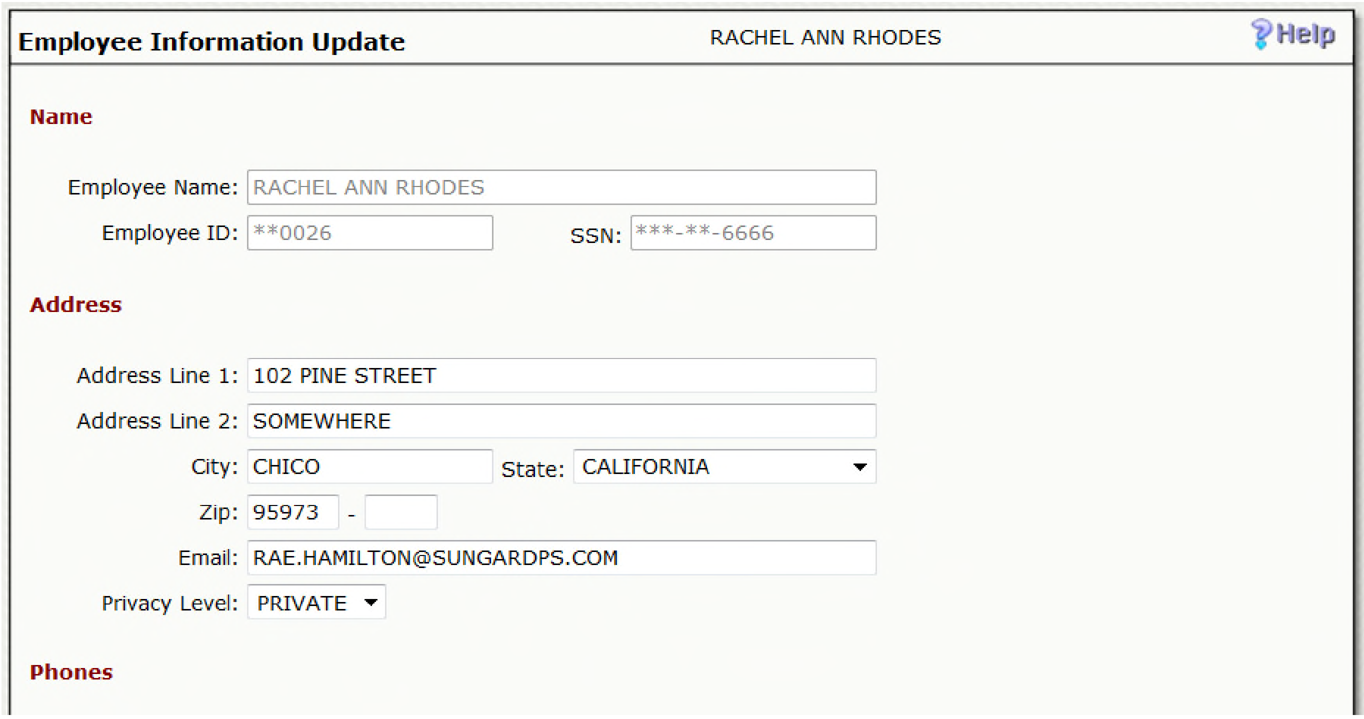
- Select OK

5. **Home Address**: May allow you to update your home address and phone number if needed, taking away the need to contact the Human Resources and/ or Payroll to make the change.



- In order to update your information, you will need to select the Edit option in the lower right hand corner of the screen. If you do not see this as an option, this simply means that your organization has not granted access to update at this time.

- You will now notice that the text went from gray to black which means you may update your information with the exception of your Name, Employee ID, Date of Hire and Date of Birth, these fields may not be updated.



Employee Information Update RACHEL ANN RHODES Help

Name

Employee Name: RACHEL ANN RHODES

Employee ID: **0026 SSN: ***-**-6666

Address

Address Line 1: 102 PINE STREET

Address Line 2: SOMEWHERE

City: CHICO State: CALIFORNIA

Zip: 95973 -

Email: RAE.HAMILTON@SUNGARDPS.COM

Privacy Level: PRIVATE

Phones

- Once you have updated the information, you will need to select Save in the lower right hand corner.

Misc

Date of Birth: 1/11/1980

Hire Date: 6/2/2002

Back Save

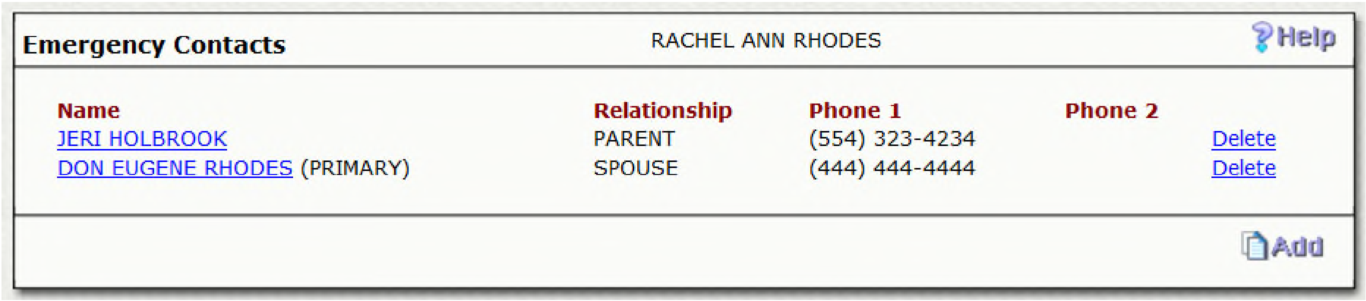
6. **<u>Family Information</u>**: May allow you to keep your active family members up to date. When you change your benefit plans and need to add/ remove a family member from a benefit plan, you will already have them defined and available.

Family Information RACHEL ANN RHODES Help

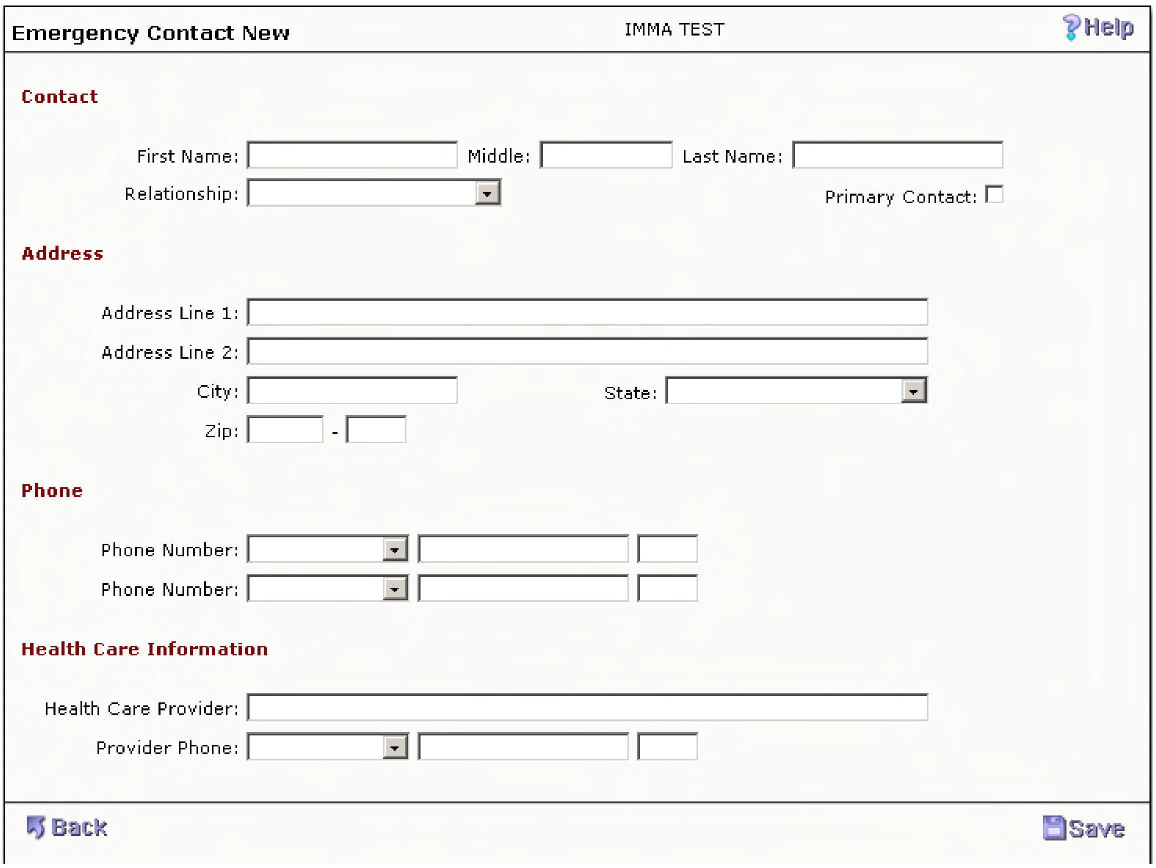
Name	Relationship	Social Security Number	Birth Date	Gender	Other Ins	
DONNIE	SPOUSE		08/26/1976	M	No	delete
BAILEY	CHILD		01/15/2005	F	No	delete
PAYTON RHODES	CHILD	***-**-1111	02/01/2010	M	No	delete

Add

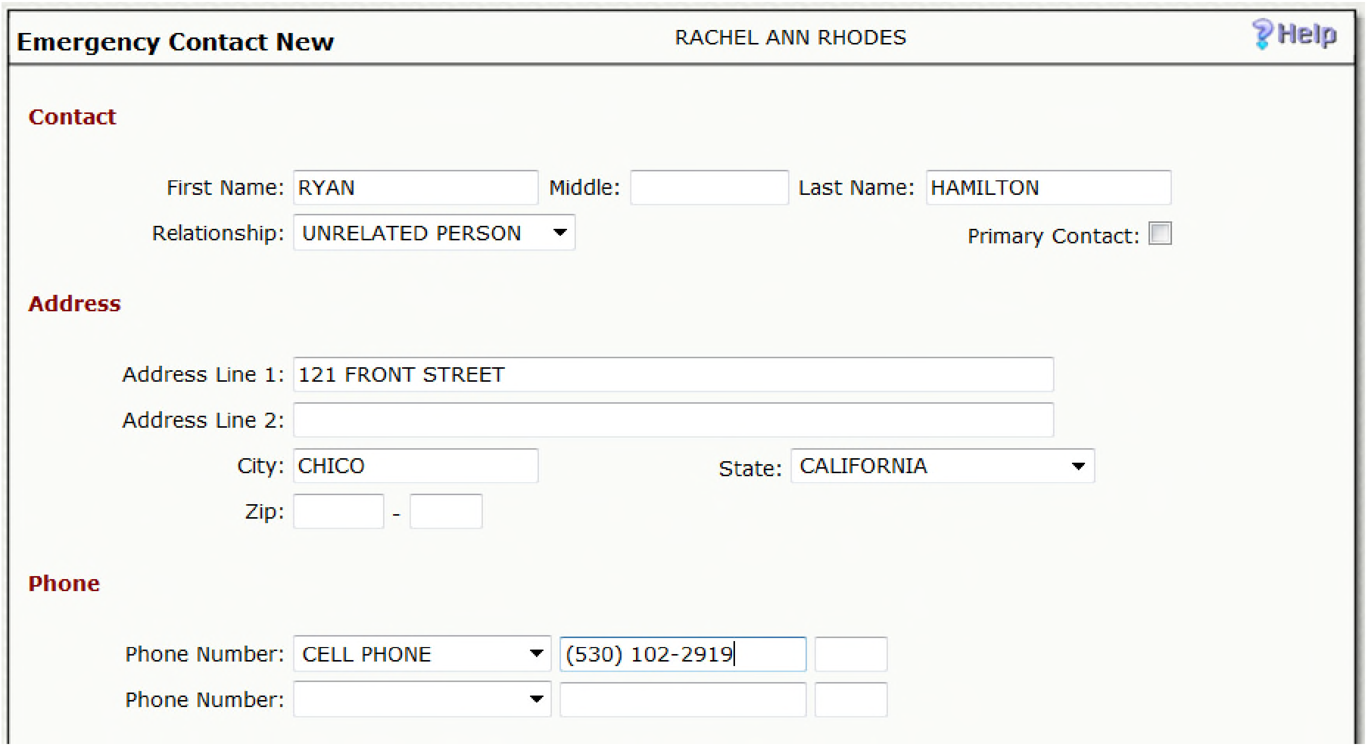
7. **<u>Emergency Information</u>**: May allow you to keep your emergency contacts up to date. You have the ability to add a new contact, mark a contact as the primary contact as well take a delete a contact.



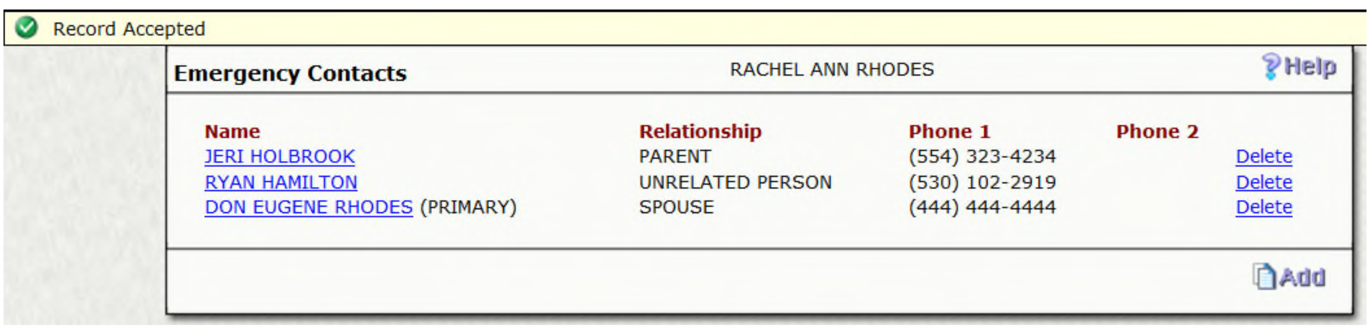
- To update your emergency contacts, select the contact name that you would like to update.
- After updating, select Save in the lower right hand corner.
- To add a contact, select the Add button.



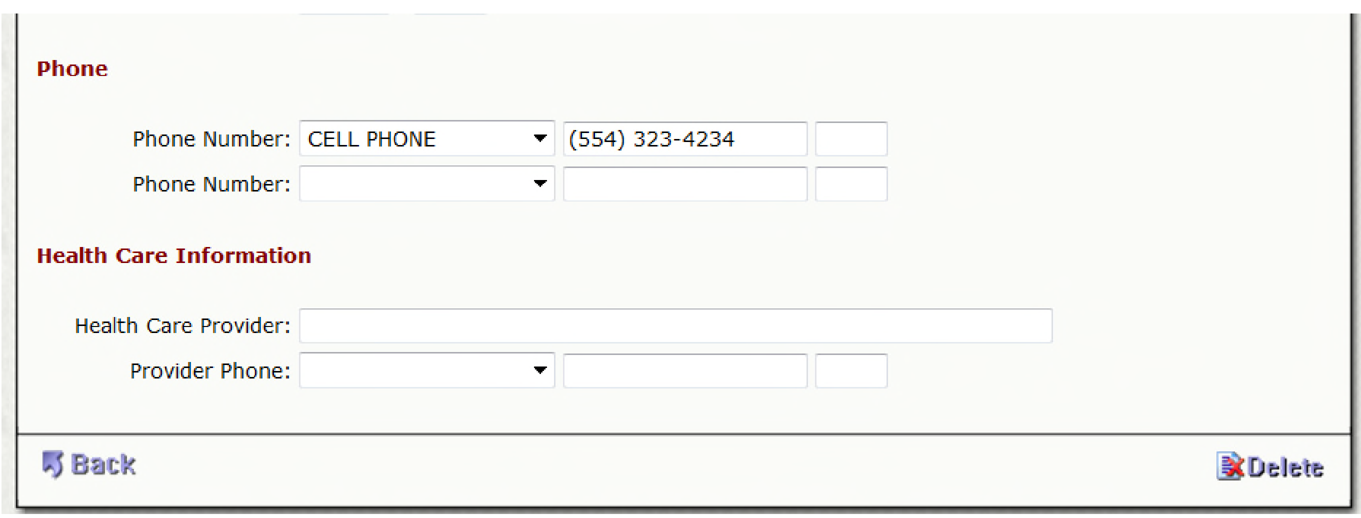
- Enter your new contact's information and select Save.



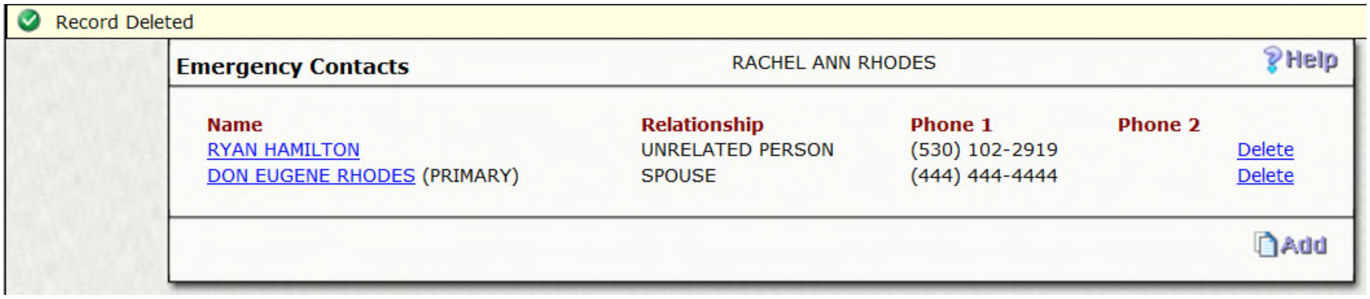
- To delete a contact, select the delete link to the right of the contacts name, this will bring up their detailed record.



- Select Delete in the lower right hand corner.



- You will now only see the remaining contacts.


Record Deleted

Emergency Contacts RACHEL ANN RHODES Help

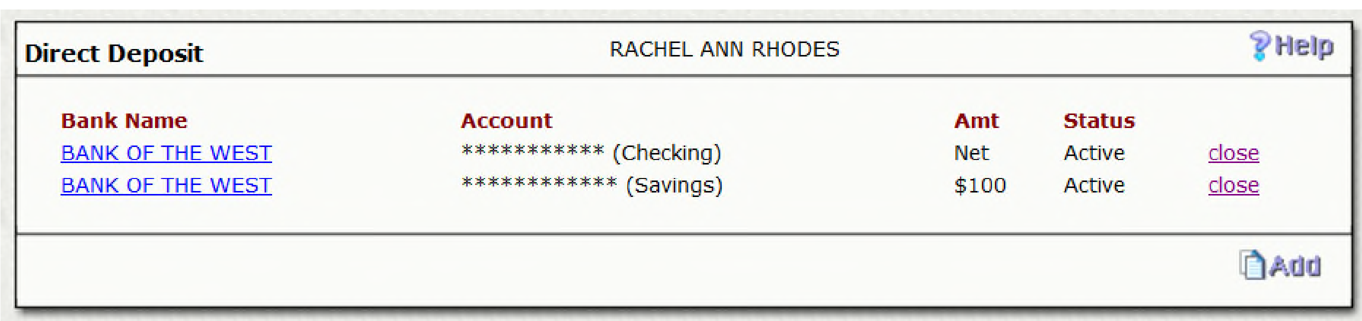
Name	Relationship	Phone 1	Phone 2	
RYAN HAMILTON	UNRELATED PERSON	(530) 102-2919		Delete
DON EUGENE RHODES (PRIMARY)	SPOUSE	(444) 444-4444		Delete

Add

8. **Check Stub**: Your organization will choose how many paychecks you will be able to view. They will then be listed by check date.
   - To view the check stub, select the appropriate check date.
   - You will now be able to view the check stub which will mimic a paper stub, you will have an option to print in necessary.

9. **W2**: After your organization runs W2's each year, there will be a copy available for you to access here. Your organization will choose how many years of history they will allow to show here.
   - To view your W2, select the year.
   - You will now be able to view the W2 and you will be given an option to print.

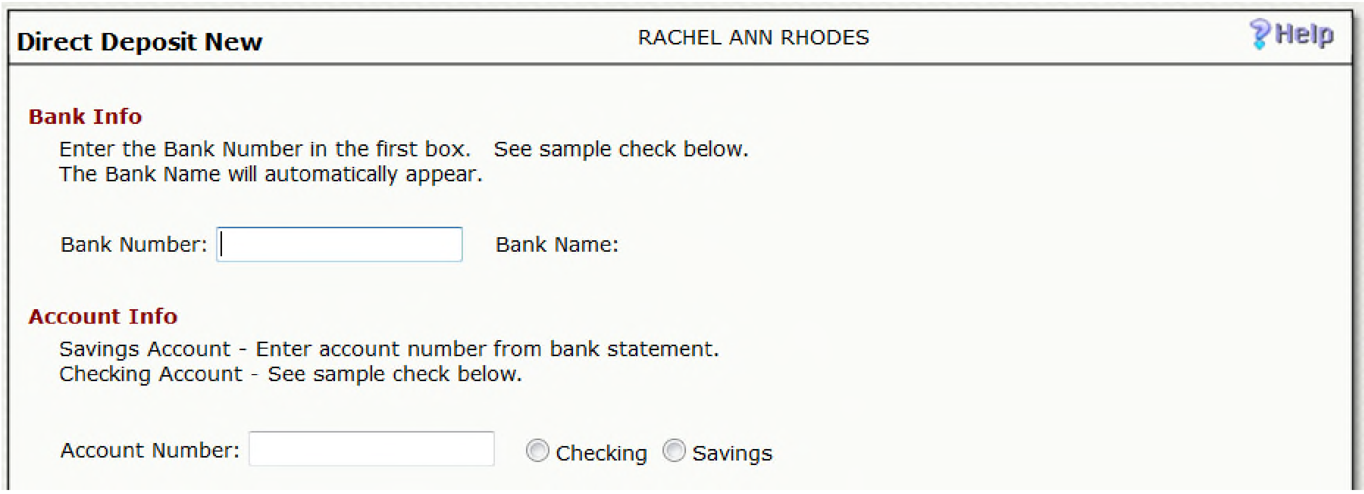
10. **Direct Deposit**: Lists your financial institution and indicates whether your paycheck will be deposited to your checking and/or savings account. Your organization has the ability to all you to add a new account as well as delete an account.


Direct Deposit RACHEL ANN RHODES Help

Bank Name	Account	Amt	Status	
BANK OF THE WEST	*********** (Checking)	Net	Active	close
BANK OF THE WEST	************ (Savings)	$100	Active	close

Add

- To update a current bank account or to review more detailed information, you will need to select the bank name.
- Be sure to select Save if updating or Back if you were just reviewing the detailed information.
- To add a new bank account, select the Add option.


Direct Deposit New RACHEL ANN RHODES Help

Bank Info

Enter the Bank Number in the first box. See sample check below.
The Bank Name will automatically appear.

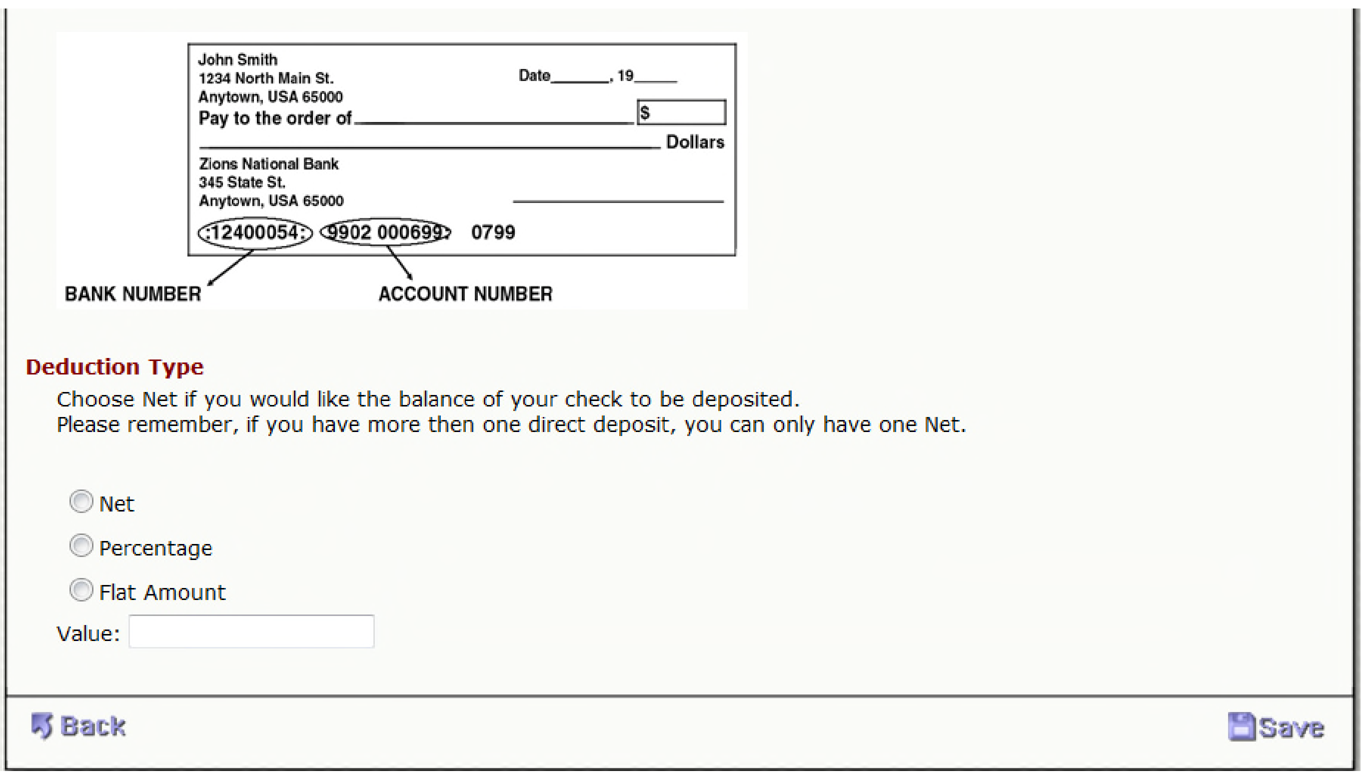
Bank Number: Bank Name:

Account Info

Savings Account - Enter account number from bank statement.
Checking Account - See sample check below.

Account Number: Checking Savings

- Enter the new bank information, be sure to check against the icon to verify you are entering the correct numbers in the correct fields. If the bank routing number that you are trying to enter does not exist in your organization's list of defined banks, you will get a warning that the bank ID cannot validate and you will not be able to save the record. If the bank is already defined, you will notice that after typing in the routing number, the bank name will shadow to the right.


John Smith
1234 North Main St.
Anytown, USA 65000
Date______, 19____
Pay to the order of __________ $
Dollars
Zions National Bank
345 State St.
Anytown, USA 65000
:12400054: 9902 000699 0799
BANK NUMBER
ACCOUNT NUMBER

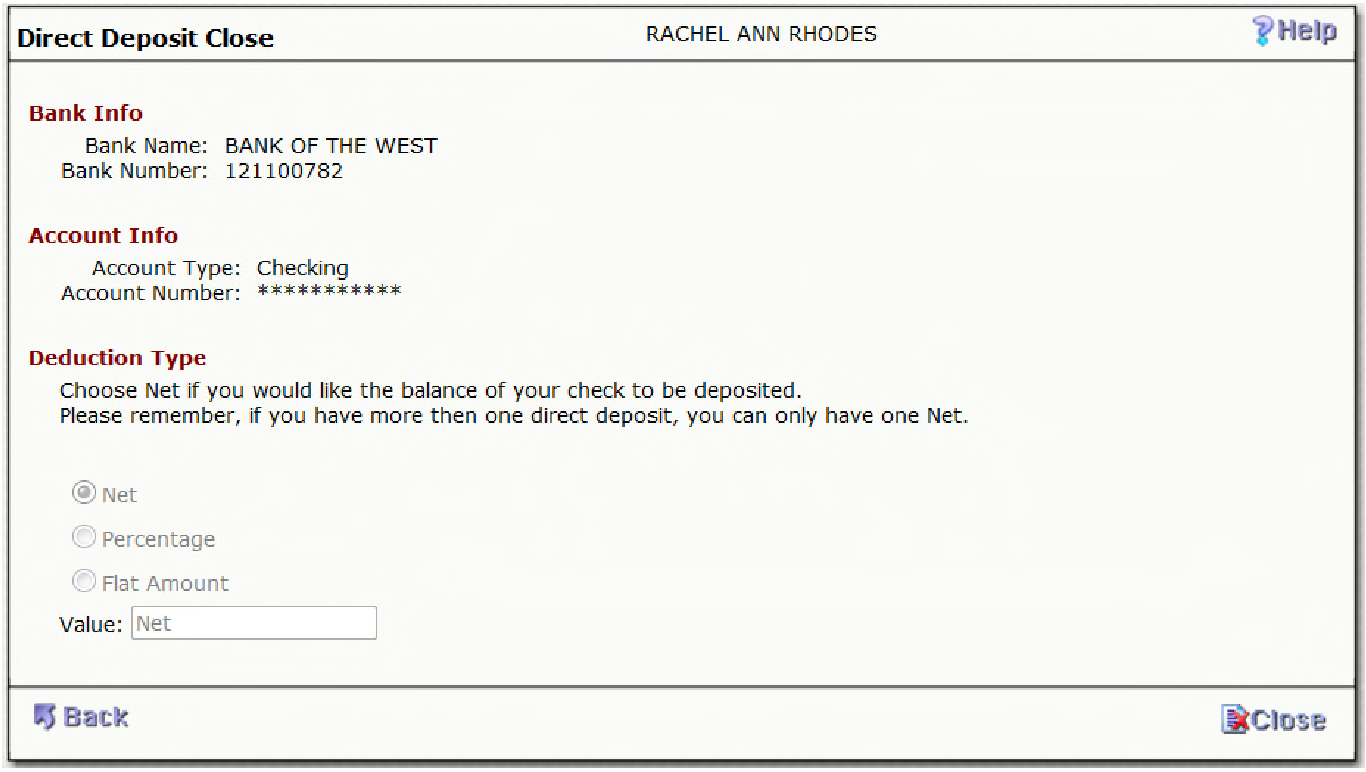
Deduction Type

Choose Net if you would like the balance of your check to be deposited.
Please remember, if you have more then one direct deposit, you can only have one Net.

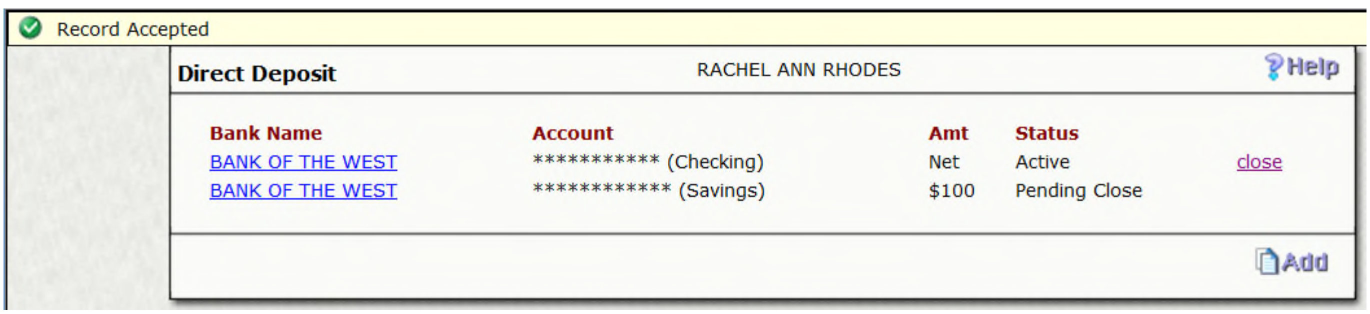
Net
Percentage
Flat Amount
Value:

Back Save

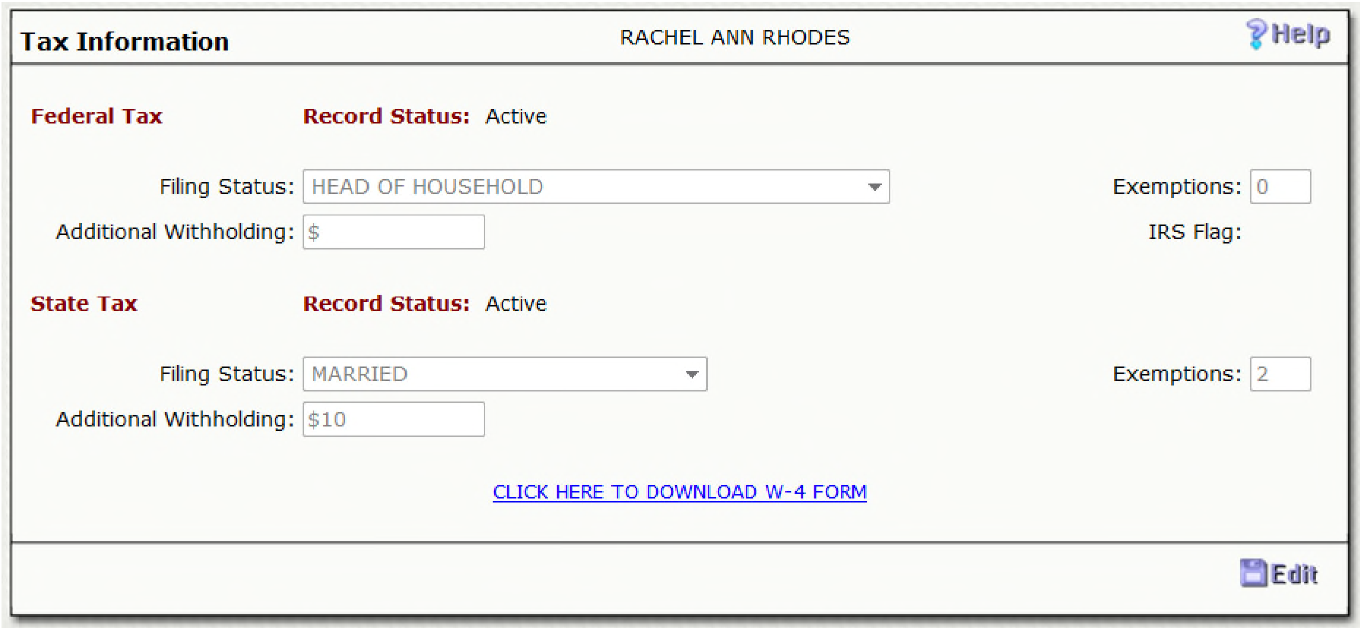
- Once you have finished entering all of your account's information, you will need to select Save.
- Now that you are back on the main Direct Deposit screen, you will notice that your new bank shows as Locked, Inactive. This will remain until HR or Payroll accepts your change. Your status will then change to Active once accepted.
- To delete a bank account, select Delete to the right of the bank you are deleting.
- The screen with the bank's detailed information will appear and you will need to select Delete in the lower right hand corner.



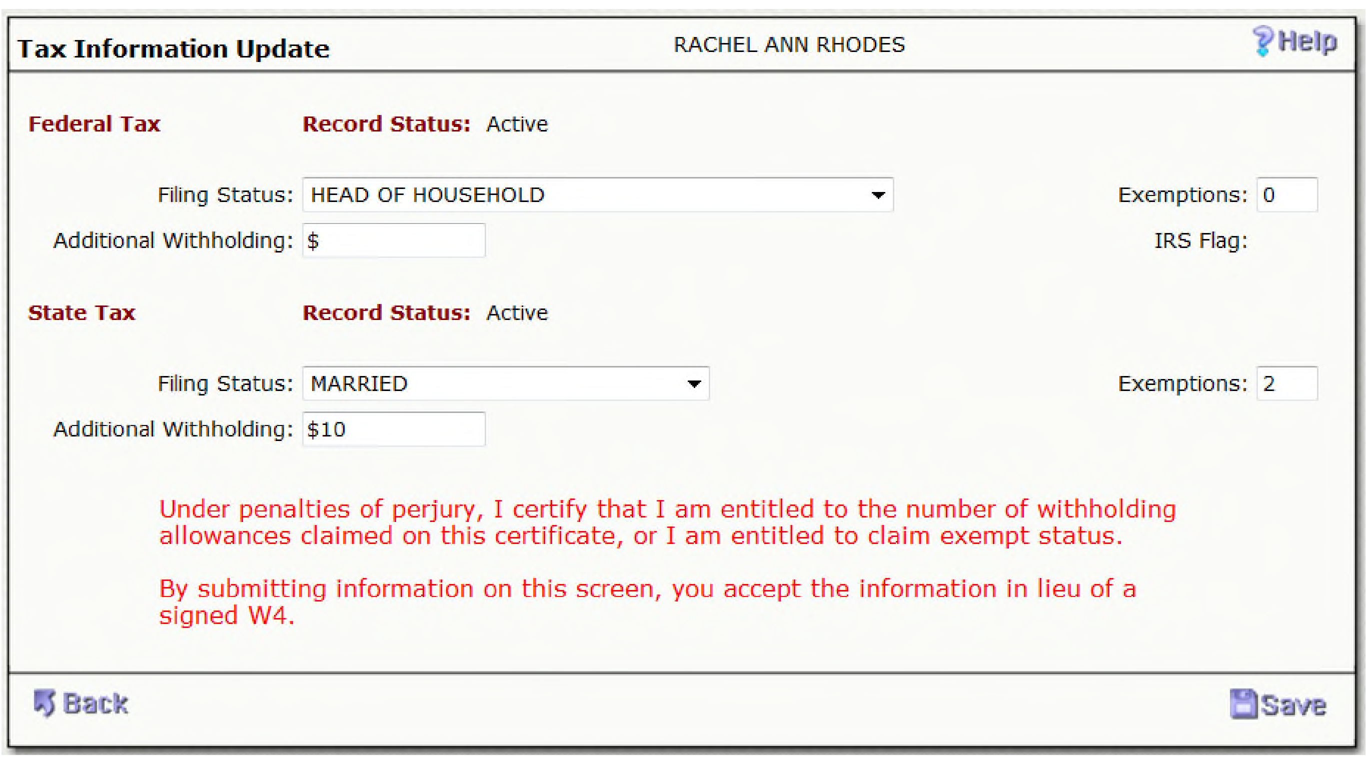
- On the main Direct Deposit screen, you will notice that your status is changed from Active to Pending Close. Once HR or Payroll accepts this change, this bank will no longer appear on your screen.



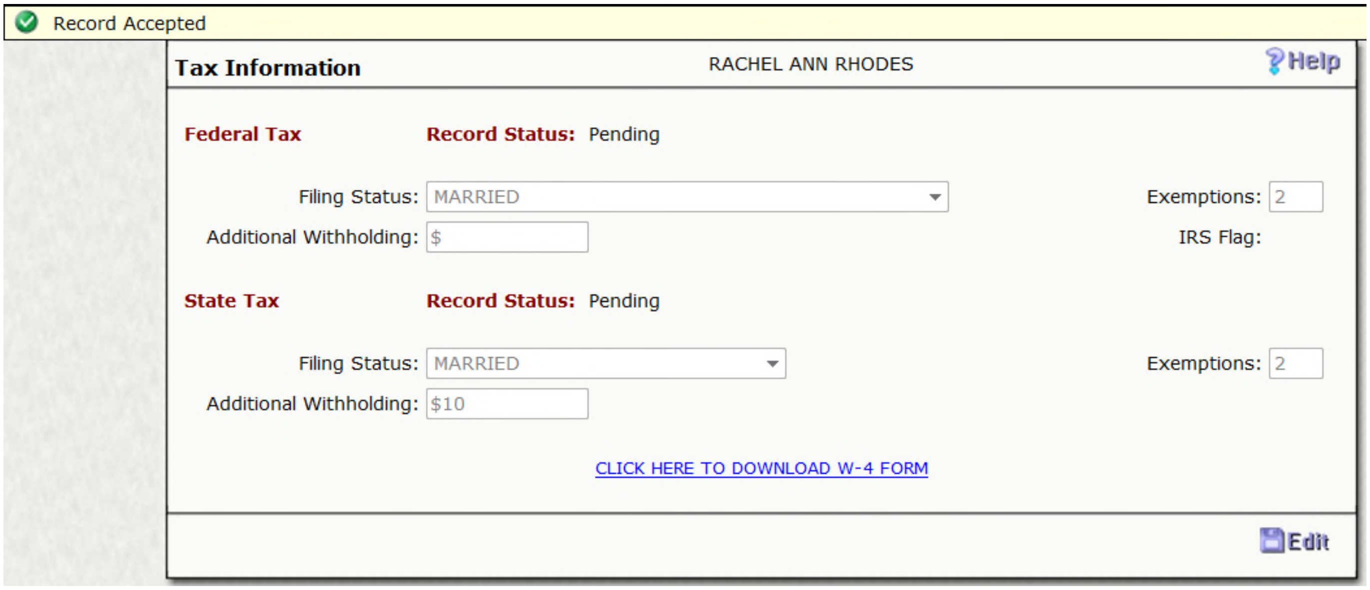
11. **Tax Information**: Shows your current Federal and State filing status. You may be able to change your status by pressing the “Edit” button in the bottom right-hand corner or by completing the W-4 form and submitting it to Payroll.



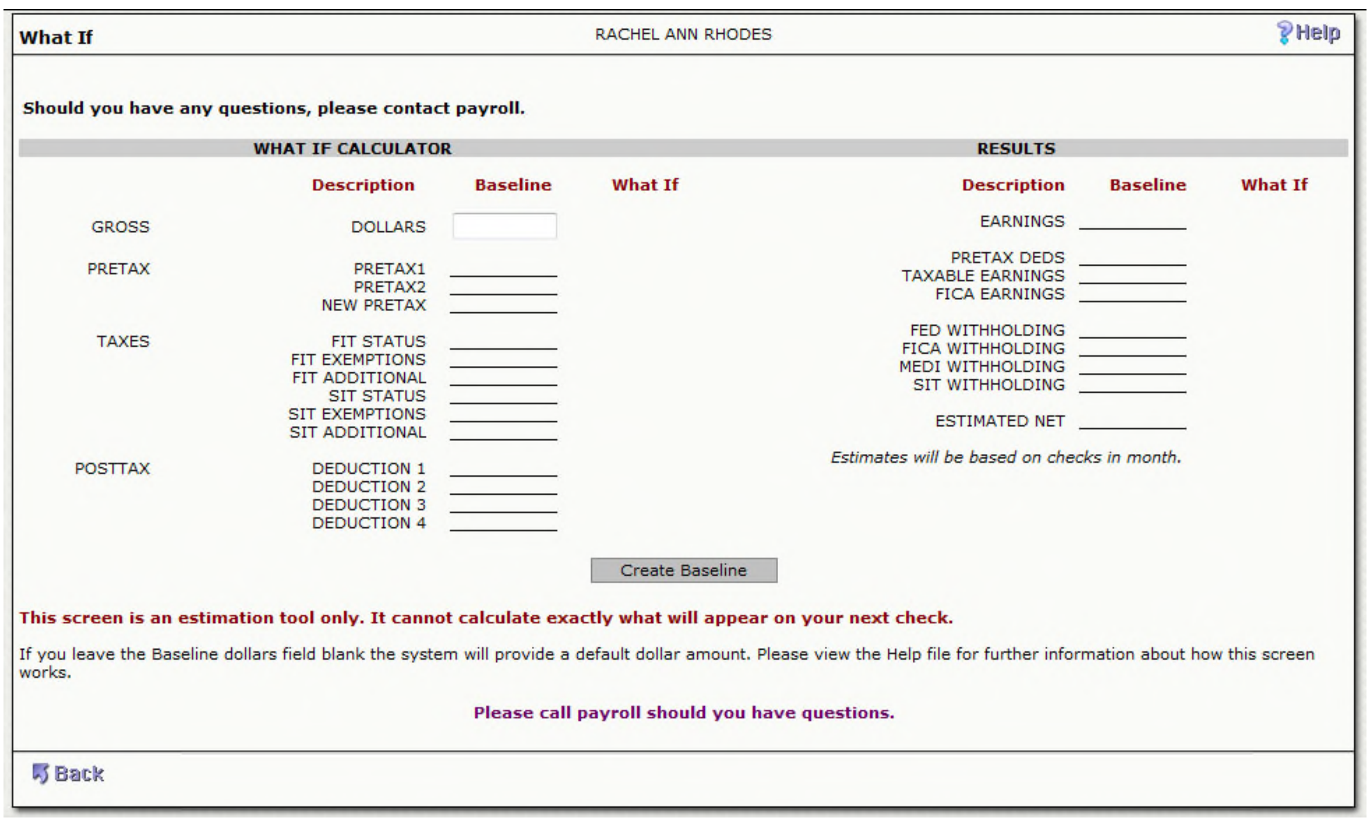
- If your organization allows you to update this information, you will have an Edit icon.
- To change your filing status, select the Edit icon
- This will open up the same information but will allow you to update, there is also a warning that you that you are certifying you are the one making changes in lieu of signing a W4.



- Change your Filing Status, Exemptions and/or Additional Withholdings, be sure to select Save when finished.
- Back on the Tax Information main screen, you will notice that your tax status went from Active to Pending. Until HR or Payroll accepts this change, your prior tax status will be used for further payroll processing.



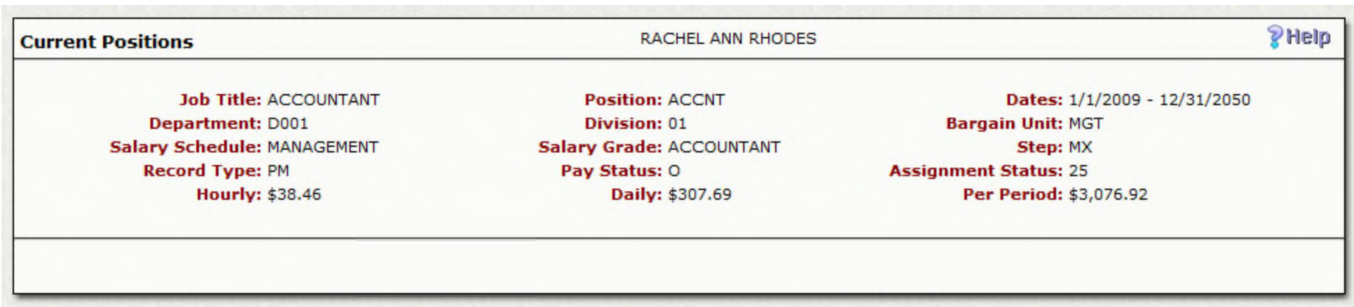
12. **What If**: This is a tool that allows you to see approximately what your check would be if you changed your filing status or began to take out an additional deduction. It can even show what would happen to your check if you received a raise. Please remember that this is ***an estimation only***; not all items are factored in to the final changes as shown on the screen.



- Select the "Create Baseline" button to bring in your current pay information. Note: There might be items that are not included.
- You will see blank lines next to your current deductions which will allow you to change your pay, deductions, and/ or taxes.

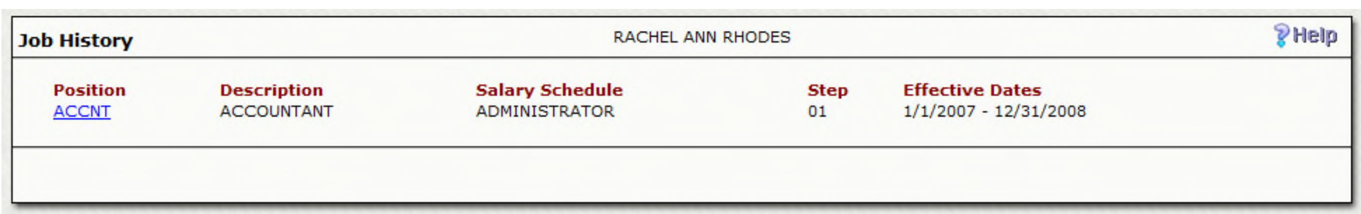
- Select "Submit" button at the bottom of the screen.
- The left side of the screen will then display an estimated change in your net pay.
- To reset and try again, select the "Reset" button at the bottom of the screen.

13. **Current Job**: Provides information about your current position including your job title, department, employee group, and salary- related information. This information is "READ ONLY" at all times.


Current Positions RACHEL ANN RHODES Help

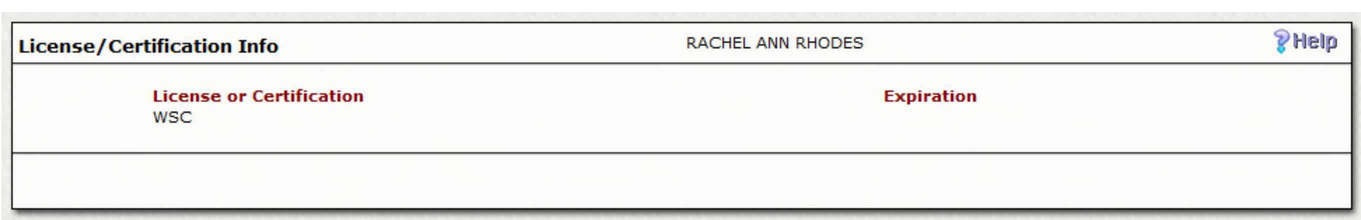
Job Title: ACCOUNTANT	**Position:** ACCNT	**Dates:** 1/1/2009 - 12/31/2050
Department: D001	**Division:** 01	**Bargain Unit:** MGT
Salary Schedule: MANAGEMENT	**Salary Grade:** ACCOUNTANT	**Step:** MX
Record Type: PM	**Pay Status:** O	**Assignment Status:** 25
Hourly: $38.46	**Daily:** $307.69	**Per Period:** $3,076.92

14. **Historical Jobs**: Provides information about your past positions including your job title, department, employee group, and salary- related information. This information is "READ ONLY" at all times. You will see a list of all of your previous positions, to access more detail information about a specific position, select the position name.


Job History RACHEL ANN RHODES Help

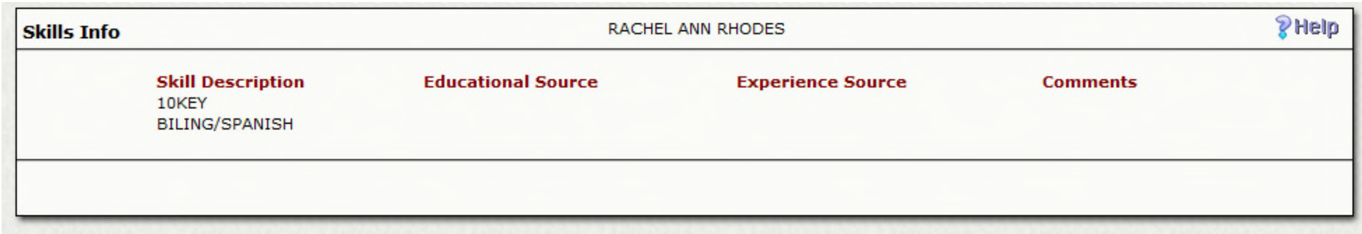
Position	Description	Salary Schedule	Step	Effective Dates
ACCNT	ACCOUNTANT	ADMINISTRATOR	01	1/1/2007 - 12/31/2008

15. **License/Certifications**: If your organization utilizations the ability to track license and certifications in the Human Resources module, you will be able to view each of your licenses and certifications here. If this information is not correct, you may not update it but you may contact your HR department.


License/Certification Info RACHEL ANN RHODES Help

License or Certification	Expiration
WSC	

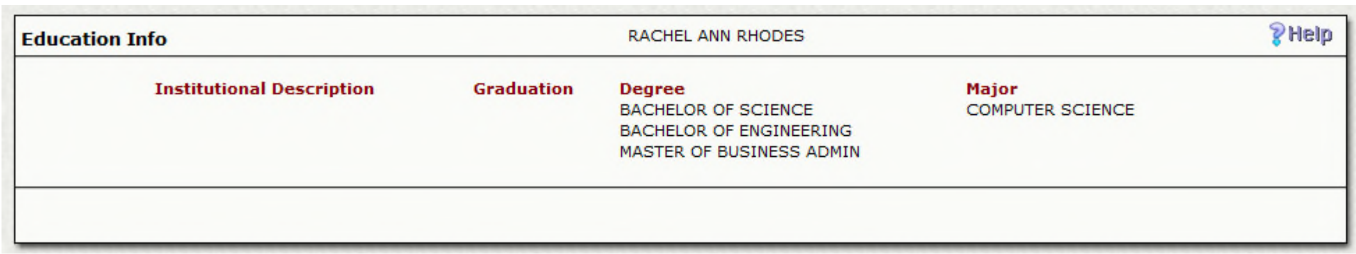
16. **Skills**: If your organization chooses to utilize the skills tracking in the Human Resources Module, you will be able to view your tracked skills. You may not update this information.



Skills Info — RACHEL ANN RHODES — Help

Skill Description	Educational Source	Experience Source	Comments
10KEY			
BILING/SPANISH			

17. **Education**: If your organization chooses to utilize the education tracking in the Human Resources Module, you will be able to view your education history. You may not update this information.

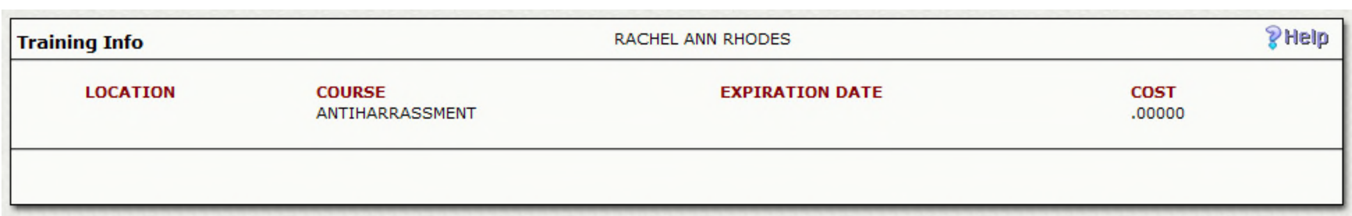


Education Info — RACHEL ANN RHODES — Help

Institutional Description	Graduation	Degree	Major
		BACHELOR OF SCIENCE	COMPUTER SCIENCE
		BACHELOR OF ENGINEERING	
		MASTER OF BUSINESS ADMIN	

18. **Tuition**: If your organization is tracking tuition reimbursements, you will be able to view that information here.

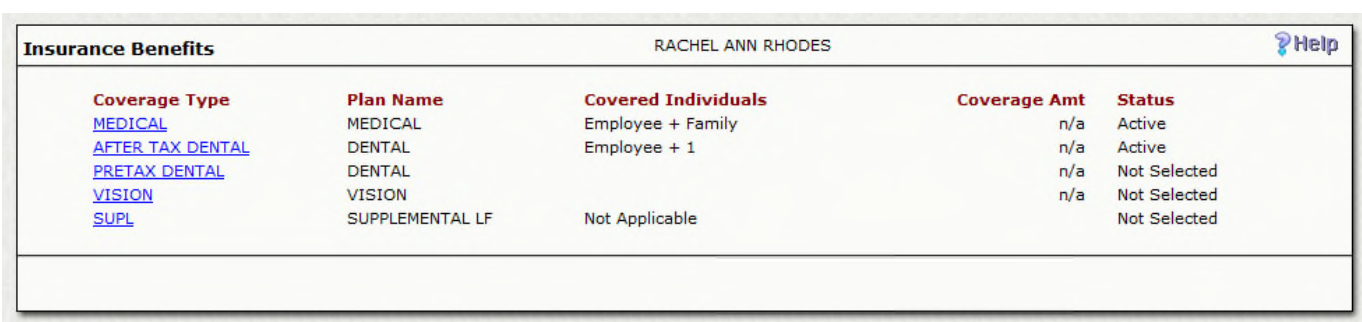
19. **Training**: If your organization is tracking trainings attended in the Human Resource module, you will be able to view that information in this section. This information will always be read only.



Training Info — RACHEL ANN RHODES — Help

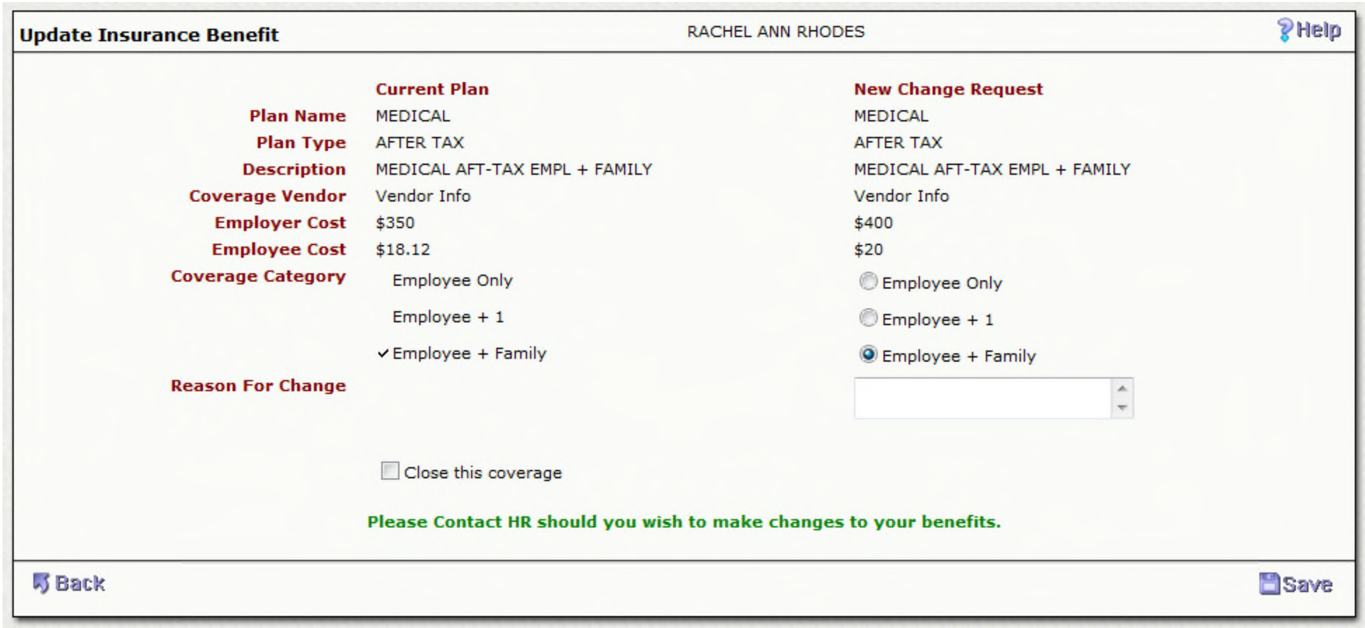
LOCATION	COURSE	EXPIRATION DATE	COST
	ANTIHARRASSMENT		.00000

20. **Benefits:** Each benefit plan that is available will appear under one of the four categories depending on sorting that your organization chose. The plans that you are currently assigned to will show as active, all others will show as inactive. To view more information about any of the plans, you must select the plan name; this will then open up another screen with more detailed information.



Insurance Benefits — RACHEL ANN RHODES — Help

Coverage Type	Plan Name	Covered Individuals	Coverage Amt	Status
MEDICAL	MEDICAL	Employee + Family	n/a	Active
AFTER TAX DENTAL	DENTAL	Employee + 1	n/a	Active
PRETAX DENTAL	DENTAL		n/a	Not Selected
VISION	VISION		n/a	Not Selected
SUPL	SUPPLEMENTAL LF	Not Applicable		Not Selected



Update Insurance Benefit RACHEL ANN RHODES Help

	Current Plan	New Change Request
Plan Name	MEDICAL	MEDICAL
Plan Type	AFTER TAX	AFTER TAX
Description	MEDICAL AFT-TAX EMPL + FAMILY	MEDICAL AFT-TAX EMPL + FAMILY
Coverage Vendor	Vendor Info	Vendor Info
Employer Cost	$350	$400
Employee Cost	$18.12	$20
Coverage Category	Employee Only	Employee Only
	Employee + 1	Employee + 1
	✓Employee + Family	Employee + Family
Reason For Change		

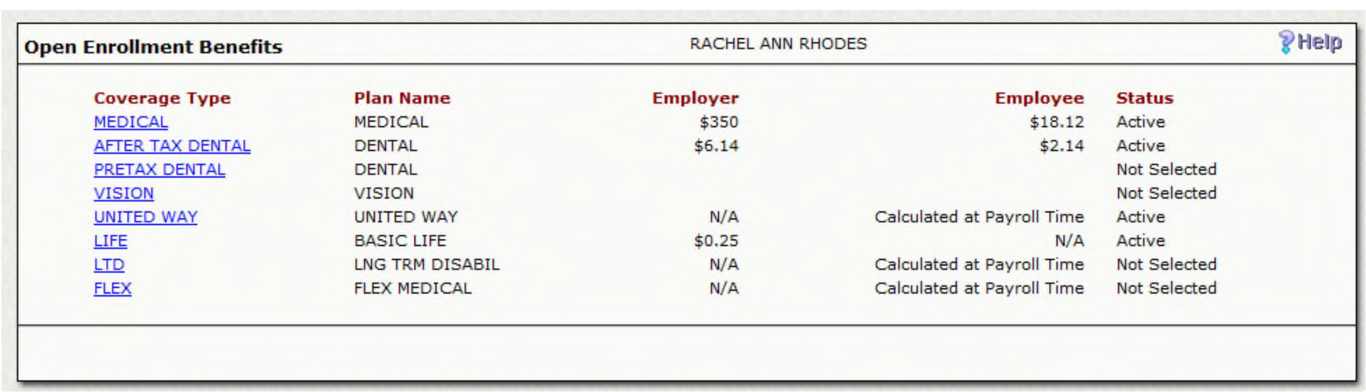
Close this coverage

Please Contact HR should you wish to make changes to your benefits.

Back Save

- Insurance
- Retirement
- Reimbursement
- Other

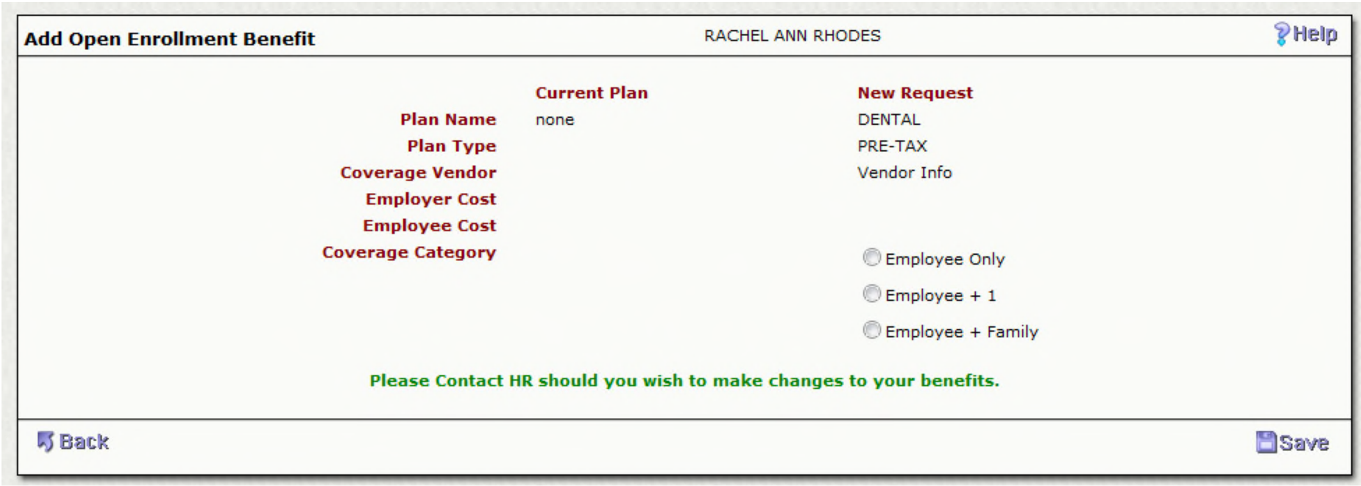
21. **Open Enrollment**: During open enrollment, all plans that are available to select will be listed in this section.



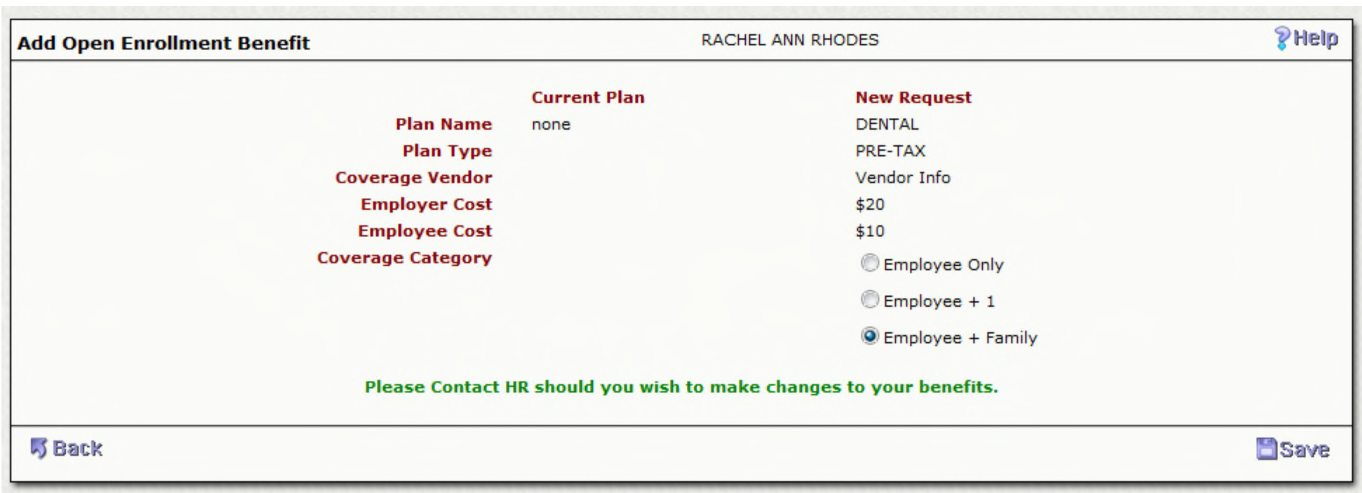
Open Enrollment Benefits RACHEL ANN RHODES Help

Coverage Type	Plan Name	Employer	Employee	Status
MEDICAL	MEDICAL	$350	$18.12	Active
AFTER TAX DENTAL	DENTAL	$6.14	$2.14	Active
PRETAX DENTAL	DENTAL			Not Selected
VISION	VISION			Not Selected
UNITED WAY	UNITED WAY	N/A	Calculated at Payroll Time	Active
LIFE	BASIC LIFE	$0.25	N/A	Active
LTD	LNG TRM DISABIL	N/A	Calculated at Payroll Time	Not Selected
FLEX	FLEX MEDICAL	N/A	Calculated at Payroll Time	Not Selected

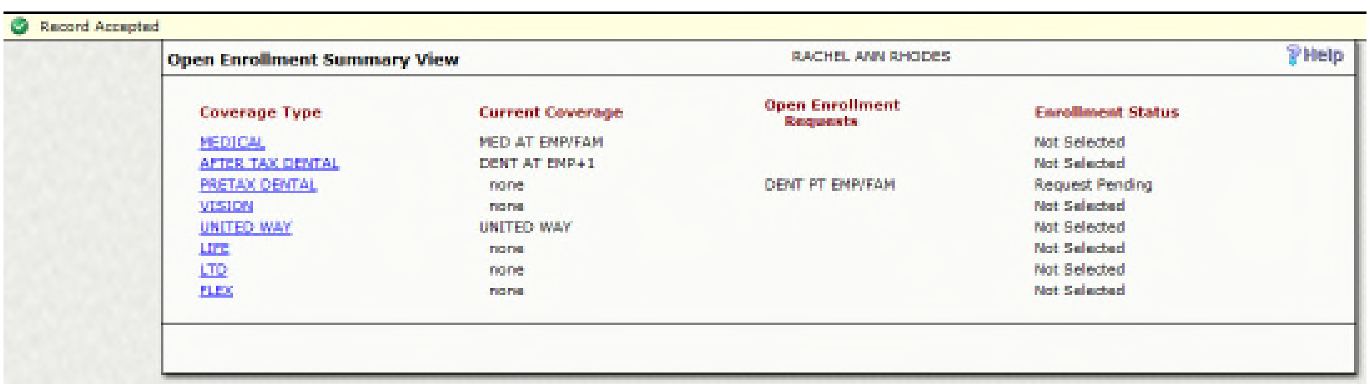
- Select the plan that you would like to enroll in



- Select the correct coverage category (employee only, employee + family, etc.)



- Select Save
- You will now notice that the plan is shown as pending until the benefits department approves this request.



22. **<u>Dependent Coverage</u>**: If your organization is tracking when family members are on which benefit plans, this section allows you to update that information.

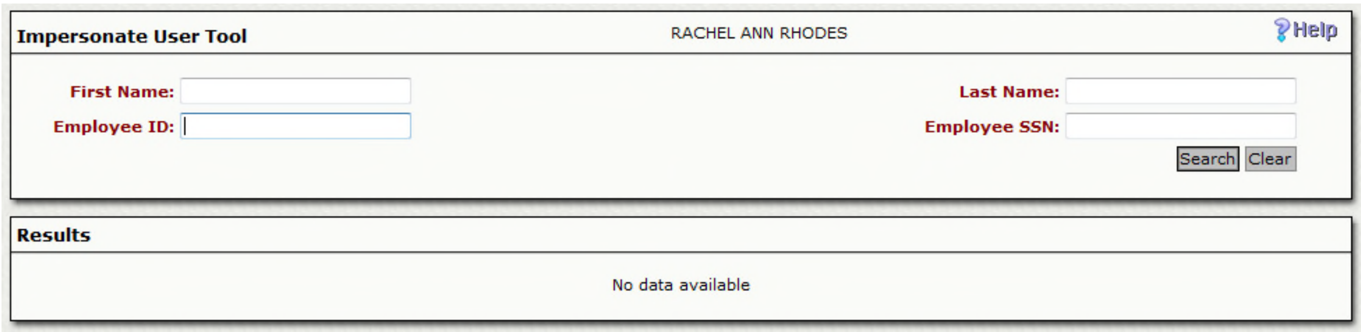
Dependent Coverages RACHEL ANN RHODES Help

Name	Relation	LIFE NA NA Not Applicable Pending New
DONNIE	SPOUSE	
BAILEY	CHILD	
RHODES, PAYTON	CHILD	

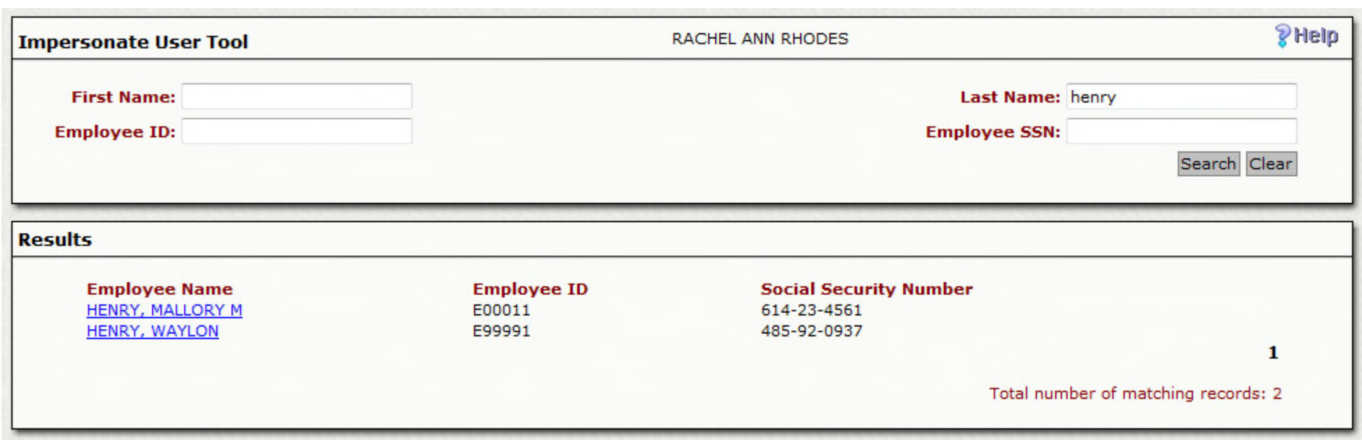
Save

Section 2: Employee Online User Manual – Administrator

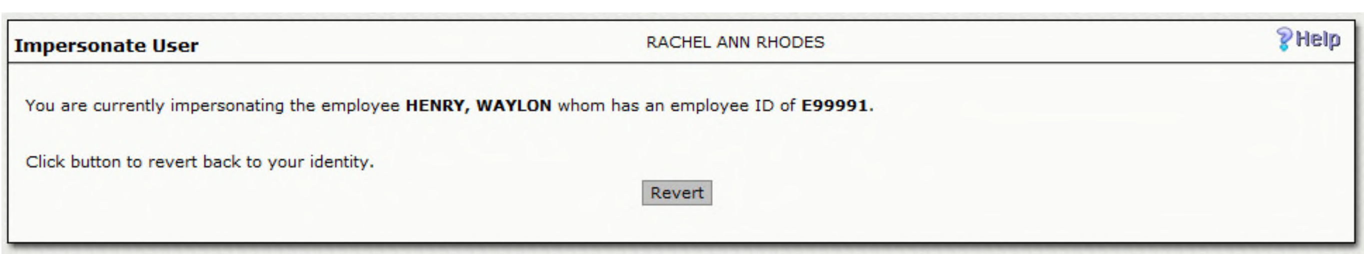
1. **<u>Impersonate User</u>**: To view the information seen in Employee Online as one of your users views it, with the EO Administrator security, you may enter the employee's ID, Name or SSN to find the employee.



- After entering your search criteria, select Search.

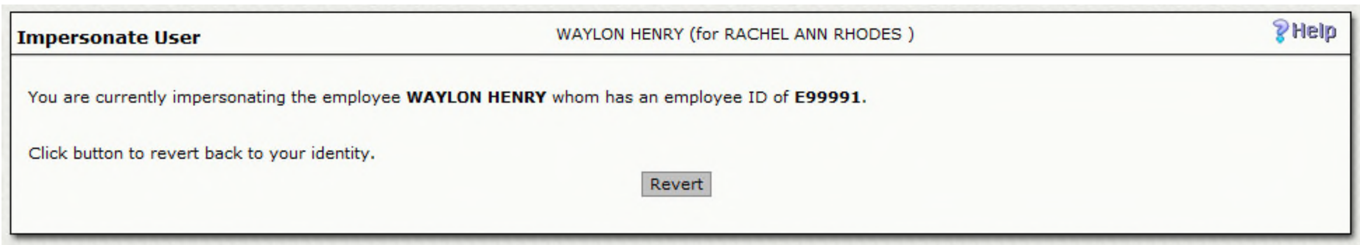


- You should now see the employee listed that you are searching for.
- Select the employee's name.

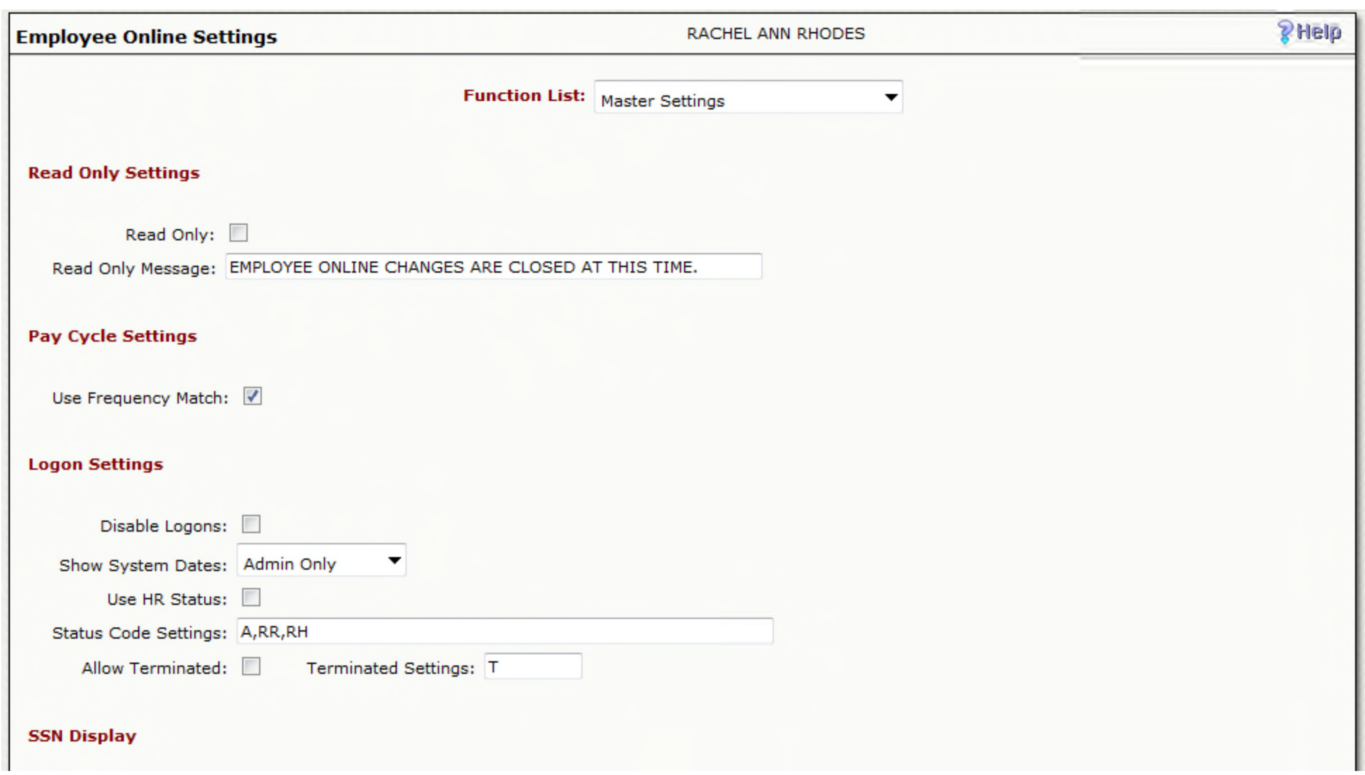


- You will now notice that on the top of the screen, you will show your name, impersonating the selected employee.
- You may now select any of the menu items to view what the employee is viewing; you will not be able to change their information.

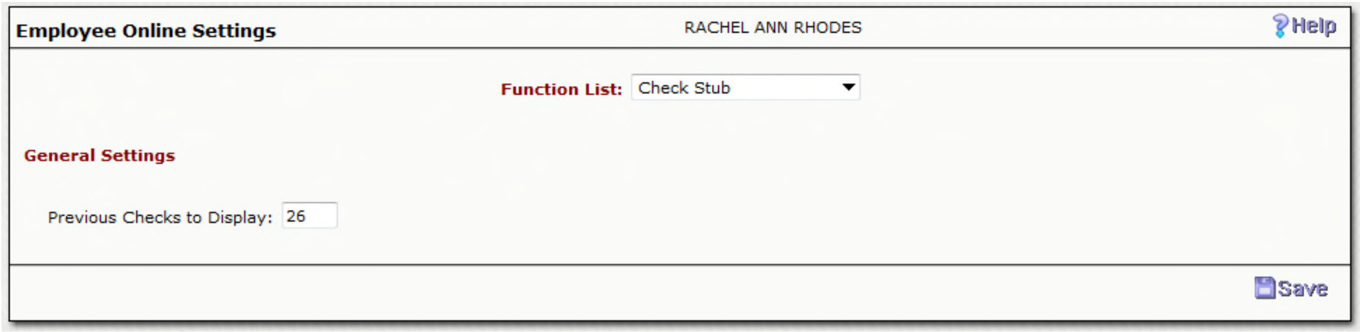
- When finished impersonating the user, select the Impersonate User and choose to Revert option.



2. **<u>EO Settings</u>**: Under EO settings, you will find a drop down that references each of the menu items available. When selecting one on the options in the drop down, you will be given control options for that specific screen.



- Example: Check Stub
- You can choose how many checks to show to the employee


Employee Online Settings
RACHEL ANN RHODES
Help
Function List:
Check Stub
General Settings
Previous Checks to Display:
26
Save

Section 3: Employee Online Set Up

Employee Online is driven by common codes, the benefits table, the EO master benefit table, and the Benefunc file. The benefit setup must maintain consistency between the HR benefit table, the EO benefit master table and the Benefunc file.

1. **Required Common Codes** – please refer to the common codes manual for further common code setup

Code	Category	Purpose
NUAS	EMPLOYEE	Gives user security to access EO
NUAS	EOADMIN	Give the user administrator rights
EOCD	BENEFITS	Set restrictions on the benefit screen
EOCD	DEFCOMP	Set restrictions on the deferred com screen
EOCD	DEFCOMP2	Set further restrictions on the deferred comp screen
EOCD	DIRDEP	Set restrictions on the direct deposit screen
EOCD	DIRDEP2	Set further restrictions on direct deposit screen
EOCD	EMER	Set restrictions on the emergency screen
EOCD	EMPDIR	Set restrictions on the employee directory screen
EOCD	FAMILY	Set restrictions on the family screen
EOCD	MASTER	Set restrictions on the master screen
EOCD	MASTER2	Set further restrictions on the master screen
EOCD	PAYCHK	Set restrictions on the pay check screen
EOCD	PERSONAL	Set restrictions on the personal information screen
EOCD	SAVBONDS	Set restrictions on the bonds screen
EOCD	TAX	Set restrictions on the tax screen
EOCD	WHATIF	Runs a mini force calculation
PYPR	CYCLExx	Defines the pay periods for the EO Dates
PYFG	PY911C	Deletes EO check stubs when payroll undo is run
PYFG	PY266C	Maintains the EO check stubs to match payroll actions
SYNO	TRNSID	Defines the EO transaction ID

2. Required User security to access EO

Access to Employee Online is granted via the existence of an Association named EMPLOYEE with the value being the Employee's ID. Administrative access is granted using an Association named EOADMIN again with a value of the Employee's ID. From here, an EO administrator may perform a variety of password/security maintenance tasks: force password change, reset password, lock account can be activated form the status field.

- **Enter your ID in the value field.**
- **Rebuild the user's security.**

3. Required Non Entity Specific Codes (HRTBHR)

Screen	Code ID	Code	Purpose
HRTBHR	ACTION_CODE	EOA	EO add record
HRTBHR	ACTION_CODE	EOU	EO update record
HRTBHR	ACTION_CODE	EOC	EO close record
HRTBHR	RELATIONSHIP_CD		The County the employee lives in

4. Required Entity Specific Codes (HRTBCE)

Screen	Code ID / Tab	Purpose
HRTBCE	BENEFIT_CATEGORY	To define the client insurance category types

5. Create EO CDHS

EO Hours and EO Deductions codes are required during the initial set-up and will be used in the 'What If' calculator to display potential changes and employee may wish to make. PRE-TAX AND AFTER TAX deductions both need to be setup; the example is of a pre-tax deduction only.

A. Create EO Hour Codes (PYUPHH)

Access the hour codes screen (PYUPHH) screen and Select the "+" symbol on the top left part of the screen to add the new Hour Code. Enter the basic hour details in the Hour Definition as shown in the example below:

- **Pay Base Flags**: plus or minus the applicable pay bases accordingly and press enter to save changes.
- Select the 'Process Switches' tab and enter the following data. Be sure to hit <enter> to save

B. Create EO Pre-Tax and After-Tax Deductions (PYUPDD)

Access the deductions (PYUPDD) screen and select the "+" symbol in the top left side of the screen to add the new deduction. Enter the basic deduction details in the Deduction Definition as shown in the example below:

- **Pay Base Flags**: plus or minus the applicable pay bases accordingly and press enter to save changes.

6. **Required Benefit Plans (HRTBBE)**: Define all active benefit plans to be made available on EO

7. **Required EO Transaction Definition (HREOSU)**

Transaction Class: EO BENEINFO REQUEST

Primary Target: BENEINFO

Secondary Target: DEPDBENF

Subsystem: HR

Allowed Modes: Y

Procedure to Call: EOBENEINFO_PROC BENEPLAN

EOBENEINFO_PROC EO GROUP

EOBENEINFO_PROC EO PLAN TYPE

EOBENEINFO_PROC REQUEST TYPE

Sub Key Title: EMPLOYEE ID

Cluster/Attribute: EMPMSTR ID

EMPMSTR NAME

Transaction Class: EO CDHASSGN REQUEST

Primary Target: CDHASSGN

Secondary Target:

Subsystem: HR

Allowed Modes: Y

Procedure to Call: EOCDHASSGN_PROC BENEPLAN

EOCDHASSGN_PROC EO GROUP

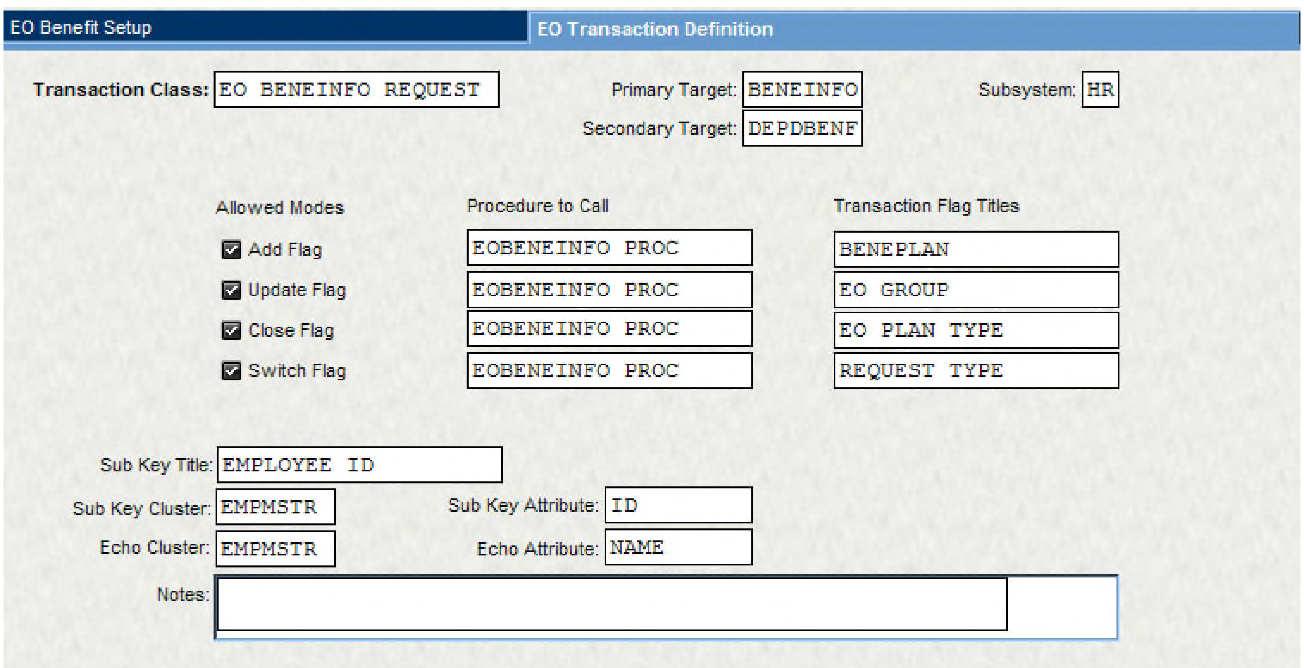
EOCDHASSGN_PROC EO PLAN TYPE

EOCDHASSGN_PROC REQUEST TYPE

Sub Key Title: EMPLOYEE ID

Cluster/Attribute: EMPMSTR ID

EMPMSTR NAME



8. **<u>Required EO Benefit Master table (HREOSU)</u>**: All active benefits defined in (HRTBBE) must be defined in this table and in the Benefunc file.

9. <u>Required Benefunc File</u>

CSBenefunc.cs is located in:
Inetpu/wwwroot/finance/App_Code/Emponline/ClientSpecific/Benefunc.cs**

- **Benefit Plans Mapping**

Employee Online requires some additional information to understand how Benefits are defined at a given site. Client benefit categories may defer from site to side. The categories below are the system defined categories.

```
/*
public const string CAT_EMP_ONLY      = "EO"; //employee only
public const string CAT_EMP_ONLY2     = "O2"; //employee only secondary type

public const string CAT_EMP_1         = "E1"; //emp plus one other
public const string CAT_EMP_1_OR_MORE = "1M"; //emp plus one or more
public const string CAT_EMP_GT_1      = "G1"; //emp plus greater then one
public const string CAT_EMP_ANYBODY   = "EA"; //emp plus anybody else or nobody else

public const string CAT_EMP_SPOUSE    = "ES"; //emp and spouse
public const string CAT_SPOUSE_ONLY   = "SP"; //spouse only

public const string CAT_EMP_DEPDS     = "ED"; //emp and dependents, no spouse
public const string CAT_SPOUSE_DEPDS  = "SD"; //spouse and depds, no emp
public const string CAT_DEPDS_ONLY    = "DP"; //just dependents, no emp, no spouse

public const string CAT_EMP_FAMILY    = "EF"; //everybody, emp, spouse, depds
*/
```

Example of client defined categories would look like this: You can enter your client defined categories in the section following the system recognized benefit categories.

```
public const string CAT_EMP_ONLY      = "EI"; //Employee Only
public const string CAT_EMP_ONLY      = "WI"; //Waived
public const string CAT_EMP_1         = "EC"; //Employee + Child
public const string CAT_EMP_FAMILY    = "EF"; //Employee + Family
public const string CAT_EMP_FAMILY    = "FN"; //Employee no premium
public const string CAT_EMP_FAMILY    = "FP"; //Employee with premium
```

Each Benefit plan must be defined in HREOSU and needs to be entered into CSBeneFunc.cs file beneplanMapArr area.

An example of benefit plans input into the Benefunc file appear as

```
public static BeneplanMapEntry[] _beneplanMapArr =
{
new BeneplanMapEntry("DENT",   "ER",  "EO",  BeneUtil.CAT_EMP_ONLY, "    csEmployee",      ""),
new BeneplanMapEntry("DENT",   "ER",  "E1",  BeneUtil.CAT_EMP_1, "       csEmployee + 1",  ""),
new BeneplanMapEntry("DENT",   "ER",  "EF",  BeneUtil.CAT_EMP_FAMILY, "  csFamily",        "")
}
```

The first four members of the BeneplanMapEntry are required and are made up of the Benecode, Benetype, Client Specific Category, and the Employee Online Category.

The Benecode, Benetype, and Client Specific Category comprise the Beneplan. The Employee Online Category is chosen based on the meaning of the Client Specific Category and provides the mapping from the Client Specific Category to one understood by Employee Online.

A list of acceptable Employee Online Categories appears in the comments in the CSBeneFunc.cs file. The last two pieces of the BeneplanMapEntry are the Category Description and the Beneplan Description. Certain Benefit Screens in EO will look here for a description of the Category or Beneplan. Typically entries in the _beneplanMapArr will be defined as part of the EO implementation. If the Benefits shown in EO change after the implementation it is important to make the corresponding changes in the _beneplanMapArr.

Relationship Codes

In a manner similar to the Benefit Mappings above Employee Online also requires some additional information to understand how RelationCodes related to family members are defined at a given site. The first part of this mapping requires that all Relation Codes at the client site aredefined as constants in the <Finance>/App_Code/Emponline/ClientSpecific/CSBeneFunc.cs file. An example appears below.

System recognized relationship codes:

```
//
// Client Specific (CS) EO.Net dependent type codes.  These need to be changed to match
//      the client's values.  In some cases you may have to add a new entry.  Those entries
//      that are not being used could be commented out or deleted
//
/* not used at this site
    public const string CS_CHILD_REL_CD           = "CH";
    public const string CS_AUNT_REL_CD            = "AU";  //aunt
    public const string CS_UNCLE_REL_CD           = "UN";  //uncle
    public const string CS_COUSIN_REL_CD          = "CS";  //cousin
    public const string CS_SIBLING_REL_CD         = "SI";  //sibling
    public const string CS_BROTHER_REL_CD         = "BR";  //brother
    public const string CS_SISTER_REL_CD          = "SR";  //sister
    public const string CS_GUARDIAN_REL_CD        = "GU";  //guardian
    public const string CS_FRIEND_REL_CD          = "FR";
    public const string CS_STEP_CHILD_REL_CD      = "SC";  //step child
    public const string CS_GRANDMOTHER_REL_CD     = "GM";
    public const string CS_GRANDFATHER_REL_CD     = "GF";
    public const string CS_SON_REL_CD             = "SN";
    public const string CS_DAUGHTER_REL_CD        = "DG";
    public const string CS_AUNT_REL_CD            = "AU";
    public const string CS_NEIGHBOR_REL_CD        = "NG";
    public const string CS_GRANDPARENT_REL_CD     = "GG";
    public const string CS_FATHER_REL_CD          = "FA";
    public const string CS_MOTHER_REL_CD          = "MO";
    public const string CS_EMPLOYEE_REL_CD        = "EM";
    public const string CS_SELF_REL_CD            = "SE";
    public const string CS_STEP_CHILD_REL_CD      = "SC";
    public const string CS_OTHER_REL_CD           = "OT";
*/
```

Example of client specific relationship codes:

```
public const string CS_CHILD_REL_CD           = "CH";
public const string CS_FRIEND_REL_CD          = "EX";
public const string CS_SIBLING_REL_CD         = "OA";
public const string CS_PARENT_REL_CD          = "PA";
public const string CS_SPOUSE_REL_CD          = "SP";
public const string CS_DEPENDENT_REL_CD       = "UA";
public const string CS_OTHER_REL_CD           = "WI";
```

Once the Client Specific Relation Codes are defined then they are used to define the RelCdMapEntry's that that define the mapping from the Client Specific value to one understood by Employee Online.

```
public static RelCdMapEntry[] csRelCdMapArr =
{
  new RelCdMapEntry(CS_CHILD_REL_CD,         BeneUtil.EO_CHILD_REL_CD,          "Child"),
  new RelCdMapEntry(CS_FRIEND_REL_CD,        BeneUtil.EO_FRIEND_REL_CD,         "Former Spous
  new RelCdMapEntry(CS_SIBLING_REL_CD,       BeneUtil.EO_SIBLING_REL_CD,        "Overaged Dep
  new RelCdMapEntry(CS_PARENT_REL_CD,        BeneUtil.EO_PARENT_REL_CD,         "Parent"),
  new RelCdMapEntry(CS_SPOUSE_REL_CD,        BeneUtil.EO_SPOUSE_REL_CD,         "Spouse"),
  new RelCdMapEntry(CS_DEPENDENT_REL_CD,     BeneUtil.EO_DEPENDENT_REL_CD,      "Underaged De
  new RelCdMapEntry(CS_OTHER_REL_CD,         BeneUtil.EO_OTHER_REL_CD,          "Widow/er")

};
```

The first two fields in the RelCdMapEntry are required. The third field is an optional description for that Relation Code. There should be a RelCdMapEntry for each Client Specific Relation Code. Again the acceptable Employee Online Relation Codes are present as a comment in the CSBeneFunc.cs file for convenience. Entries in this area are usually defined during the implementation of Employee Online. It is

important to update these entries if Relation Codes change at any time.

This area of the CSBeneFunc.cs file also allows for the grouping of Client Specific Relation Codes for use by different screens in Employee Online. Groupings include Parent, Dependent, Eligible Dependent, Spouse, Emergency Info and Family. The Emergency Info and Family groupings are used to filter which entries are shown on their respective EO screens. The Spouse and Eligible Dependent groups are used to filter entries shown on the Benefit screens that are sensitive to Dependents. Here's an example of an Eligible Dependents entry.

```
public static string[] csEligibleDependentTypes = new string[]
{
CS_CHILD_REL_CD,
CS_SON_REL_CD,
CS_DAUGHTER_REL_CD,
CS_DEPENDENT_REL_CD
};
```

Coverage Choices

Employee Online allows for Benefits which embody a coverage amount, i.e. Supplemental Life. If the coverage amount is fixed then the amount is determined on the associated HRTBBE Benefit Definition Tab, Cap/Amt/Cov 1 and 2 fields are defined to be the same amount. If the coverage varies from a minimum to a maximum in regular steps then the min is defined in Cap/Amt/Cov 1 and the max is defined in Cap/Amt/Cov 2 and the step is defined on the HREOSU EO Benefit Setup Tab, Increment Amount field. In the case where the coverage amounts occur at irregular intervals those steps can be defined in the <Finance>/App_Code/Emponline/ClientSpecific/CSBeneFunc.cs file.

To do so first create an array of the acceptable steps like the following:

```
public static decimal[] _cvrgDENEREF =
{
100000,
125000,
150000,
175000,
200000,
225000,
250000
};
```

If the increments occur at irregular intervals then define those steps here.

Remember to leave off the comma after the last value is entered.

The name of the array starts with _cvrg and is followed by the associated Beneplan. Once this array has been defined it must also be included in the following function (found in CSBeneFunc.cs).

```
public static decimal[] CSGetCvrgArr(string beneplan)
{
switch (beneplan)
{
case "DENEREF":
return _cvrgDENEREF;
default:
return null;
}

}
```

Include your benefits plans with arrays defined above here.
For each case “planname”
Return “_cvrgplanname”

Filtering of dependents display on EO

This part of the Benefunc will allow display on EO of the dependents on a benefit plan.

```
public static string[] csParentTypes = new string[]
{
    CS_FATHER_REL_CD,
    CS_MOTHER_REL_CD
};

public static string[] csDependentTypes = new string[]
{
    CS_DEPENDENT_REL_CD

};

public static string[] csEligibleDependentTypes = new string[]
{
    CS_NEIGHBOR_REL_CD,
    CS_OTHER_REL_CD,
    CS_CHILD_REL_CD,
    CS_DEPENDENT_REL_CD
```

10. BENEFUNC file Trouble Shooting

1. HRPYBE – When creating benefits, think of Employee Online:

- Employee online Benefunc.cs file requires that each benefit plan have a category.
- IF no benefit category was defined then in the Benefunc file enter the benefit code where the benefit category would be inserted as the work around. **It would look like below:**

new BeneplanMapEntry("", "AT", **"SUPL",** BeneUtil.CAT_EMP_ONLY, "Not Applicable", ""),

2. Benefit Tables associated with EO

- The benefit table (HRTBBE) benefit information (HRPYBE), the Employee online Benefit Master (HREOSU) and the Benefits input in the EO Benefunc.cs file must all match exactly.

3. Relationship Codes Check to make sure:

- Make sure to check that there is not semi-colon after the last defined relationship code preceding the } symbol.
- Make sure your relationship codes exist in the system defined relationship codes.
- Check for spelling errors.

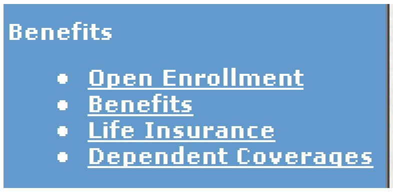
4. In version 7.9.1, **& symbol** is not recognized and will generate the XML error below: that may look like:

"XML Exception found parting request string:"" is an unexpected token. The expected token is ";" line 1 position 1867."

11. Optional Open Enrollment Menu

To allow an open enrollment screen you will have to uncomment out or add an open enrollment menu on the menu.xml file which holds all of EO's menus. The menu.xml is located in: C:\Inetpub\wwwroot\FINANCE\EmpOnline\ClientSpecific. The menu looks as follows:

<PAGE URL="./Benefits/OpenEnroll.aspx?Group=OPENENROLL" TITLE="Open Enrollment" />



The Open Enrollment menu will only be available during the open enrollment periods.

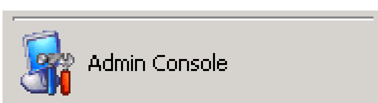
The EOBEMSTR (HREOSU) records are capable of holding two different enrollment period definitions. There must be consistency in the begin/end dates for these two enrollment periods.

Things to Check if plans are not showing up in EO: Period dates entered above are in MM/DD format and that the payroll are periods defined within the period begin and end dates in common code PYPR CYCLExx.

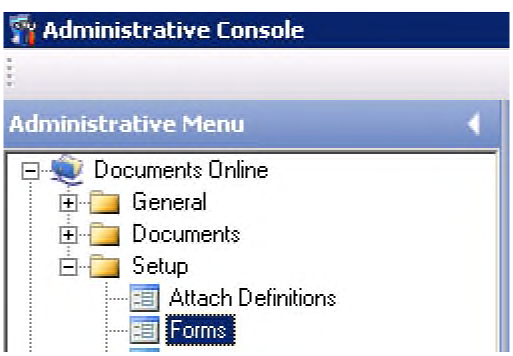
12. W-2 Form and Attach Definition for Workflow

Documents Online Configuration: The following steps will walk you through the process of adding the W-2 Form Image into Documents Online and then setting up an Attachment Definition which will define how the W-2 gets linked to a user.

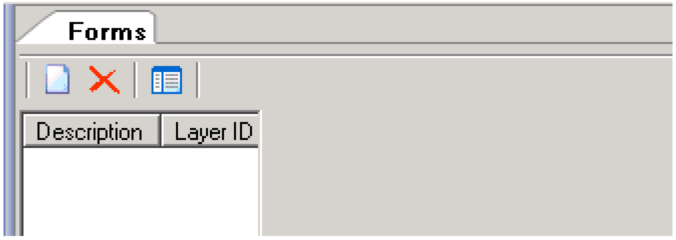
Access the Admin Console from the server



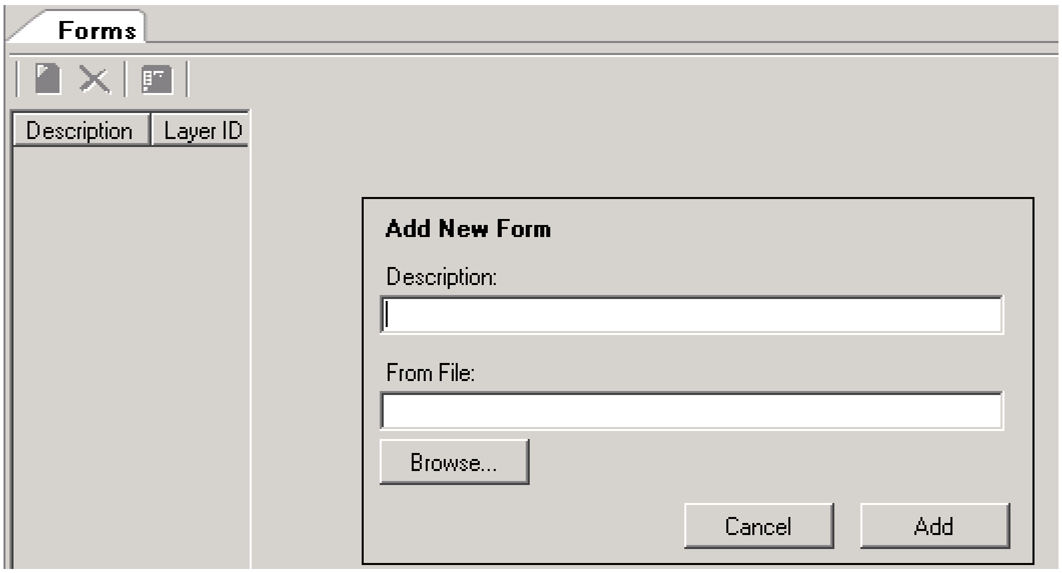
Under Documents Online select Setup, and then double click Forms



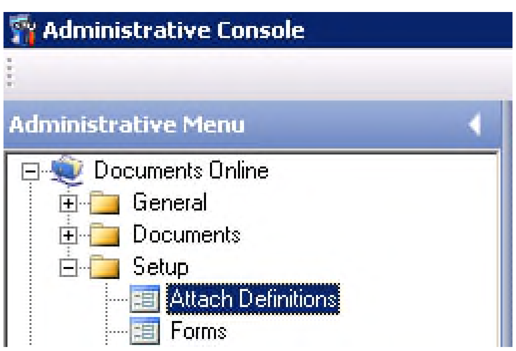
Add a new form by selecting the white paper icon



Specify the description such as W2 along with the year it is for. Employee Online will use this description as the display for the W-2. Your form should have already been ordered and will reside in your directory.

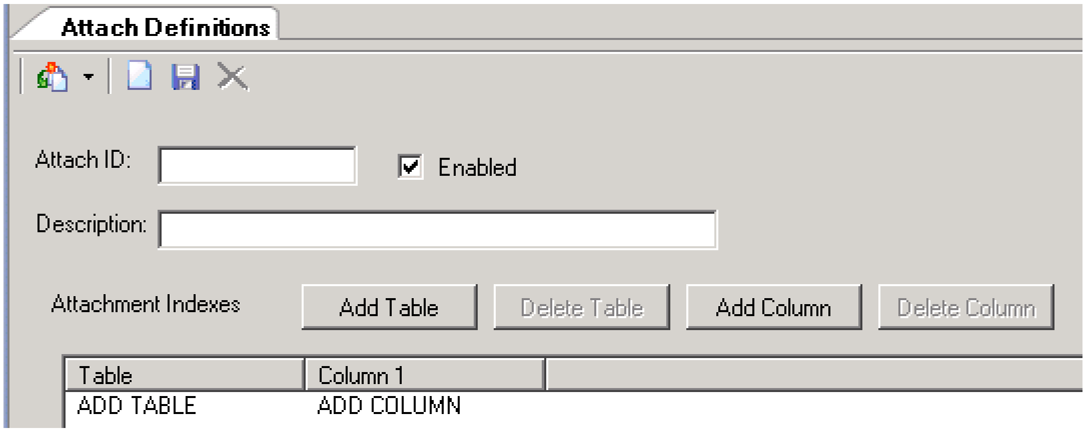


Under Documents Online select Setup, and then double click Attach Definitions

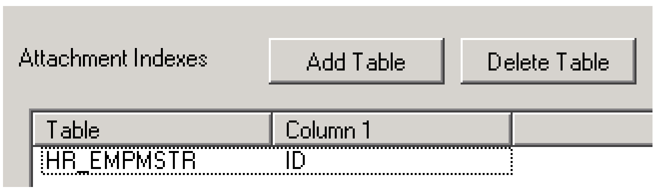


Next Attach a Definition

Add a new Attach Definition by selecting the white paper icon and give it a unique Attach ID and a description.

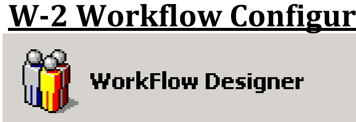


Select Add Table and rename HR_EMPMSTR and change column 1 from Add Column to ID.



After your save, write down your attach ID to use it when you configure the W2_TO_DO workflow model.

13. W-2 Workflow Configuration



- Choose file, then Open, and browse to the W2_TO_DO and select the W-2 to Documents Online and click Ok
- Right click on the 'Assign Form to Document' node and choose Edit Properties. Navigate to the 'Who, Action, and Wait' tab. 'In the Action' area, ensure 'Assign Form to Document' is selected from the dropdown list and then Click Settings. On the Form Name dropdown choose the new form you added in Step 2 of the Documents Online configuration. This will be the form that the W-2 Data will be placed on. Keep in mind that this will need to be set each year before running W-2's. Click Ok on both screens.
- Next, right click on the 'Document' Node and choose edit properties. Navigate to the 'Who, Action, Wait' tab. IN the 'Action' area, ensure 'Document is selected from the dropdown list and then Click Settings. Type in the name of the Attachment Definition you created of the Documents Online Configuration into the Attachment Definition edit box. Click Ok on both screens.
- Choose File and Save, and exit the Workflow Designer.
- To activate the workflow for EO, run the PYW2PW process, specify the printer to WORKFLOW, and ensure that both the Line printer and the Forms printer priorities match.

14. Required Customize Desktop

To get welcome page and Instructions to show up on Employee Online you need to login to Portal Settings, NUUPPS.

On the Main tab select Groups and make sure that for Existing Content Group that Employee Online has the Association set to EMPLOYEE.

Then from the Main tab go to Content and make sure to add the pages and urls for Welcome, nstructions, and EO Dates. They should be located in the following folder: C:/ inetpub / wwwroot / finance / EmpOnline

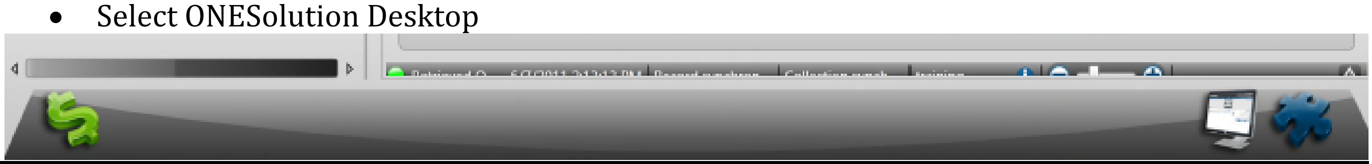
Tip: To change the width and how these boxes appear in EO you may have to delete the URLs here are re-enter them again for your new Width to take effect.

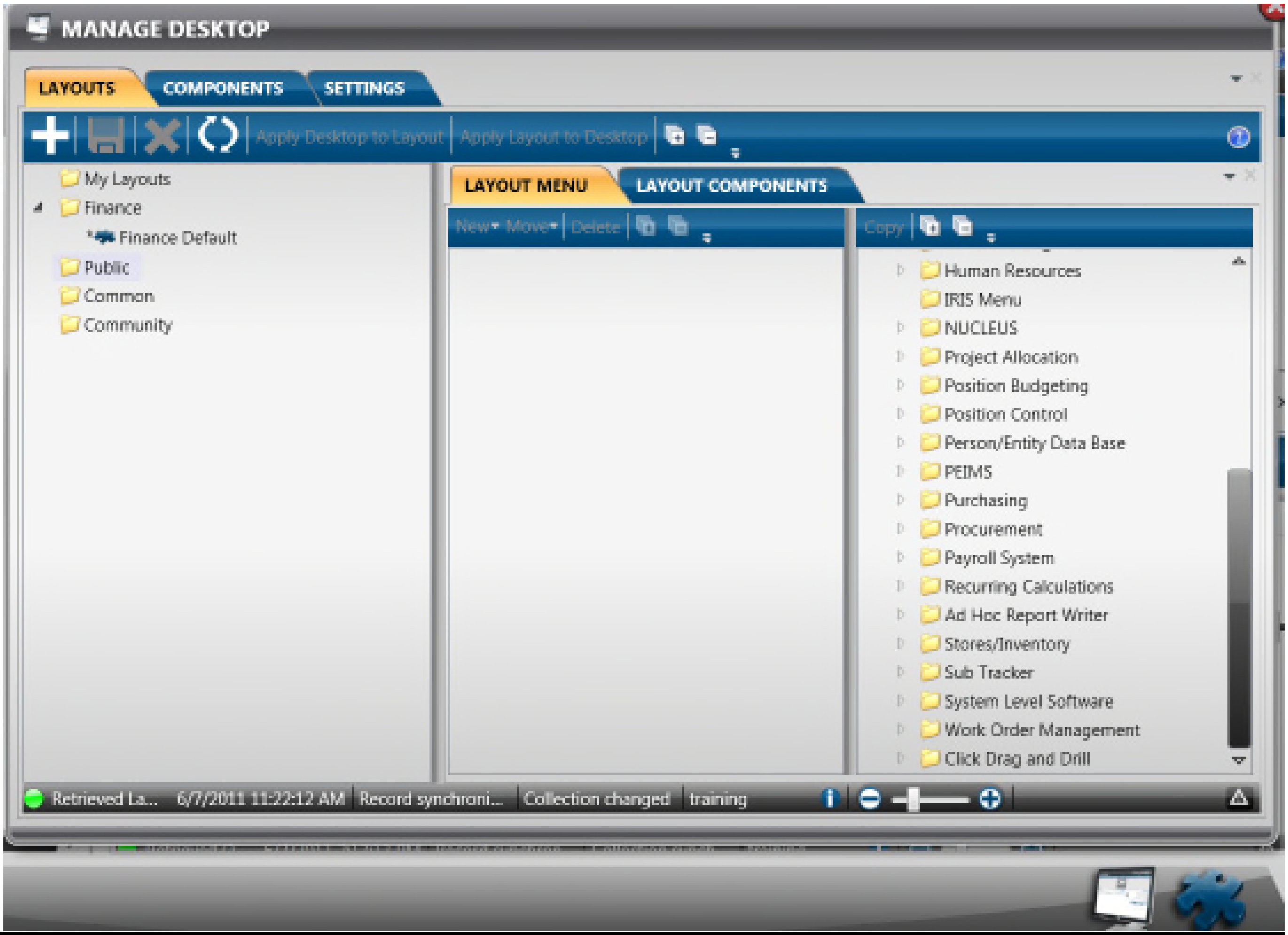
Then go to the Employee Online Tab and select Default Content; put a check box in Welcome, Instructions, and EO Dates. Make sure to SAVE.

Next select Default Layout and add Welcome, Instructions, and EO Dates into the columns. Make sure to SAVE.

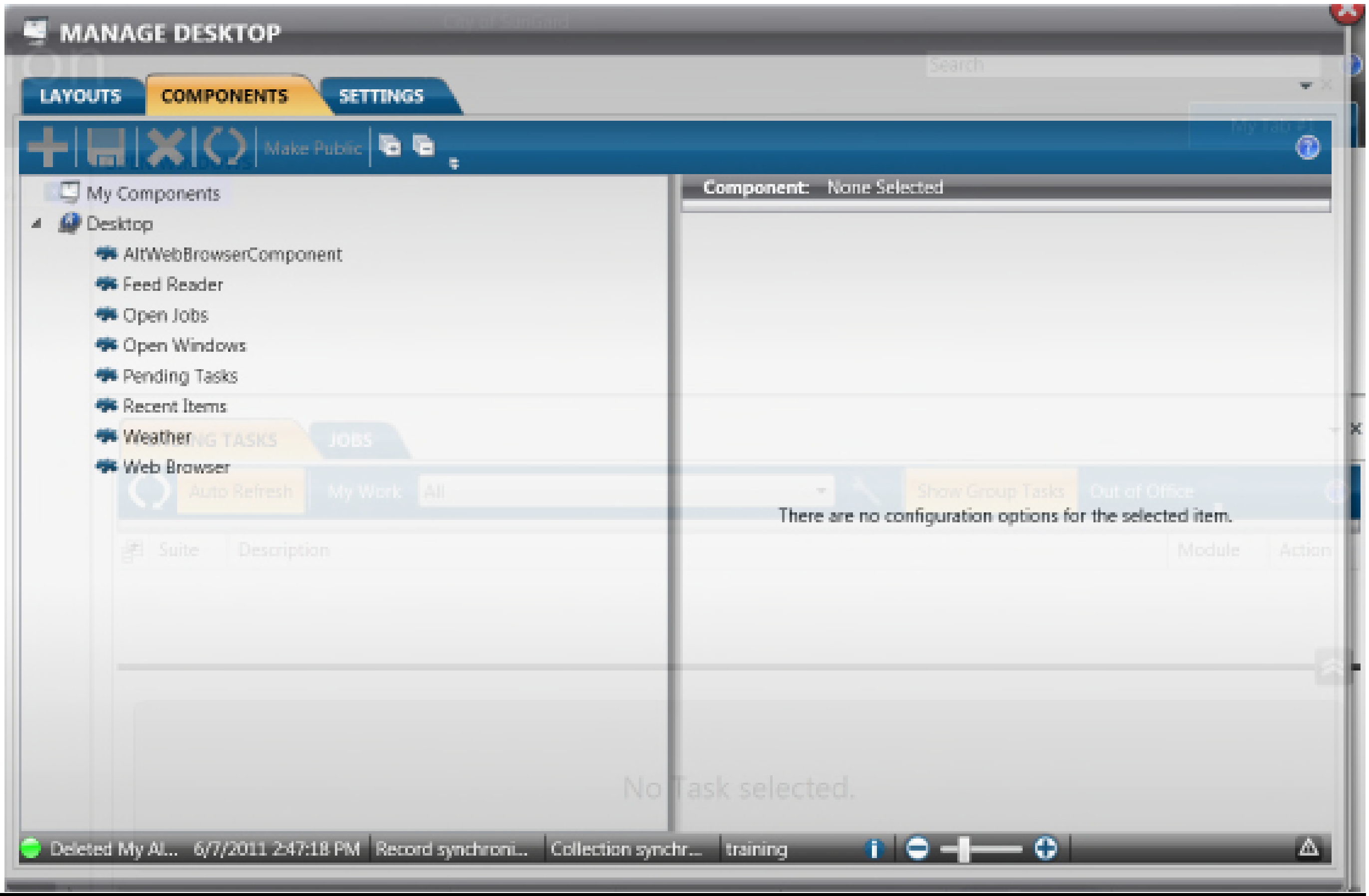
15. <u>Add EO Tab to the Desktop</u>

- Select ONESolution Desktop





- Select the Components tab

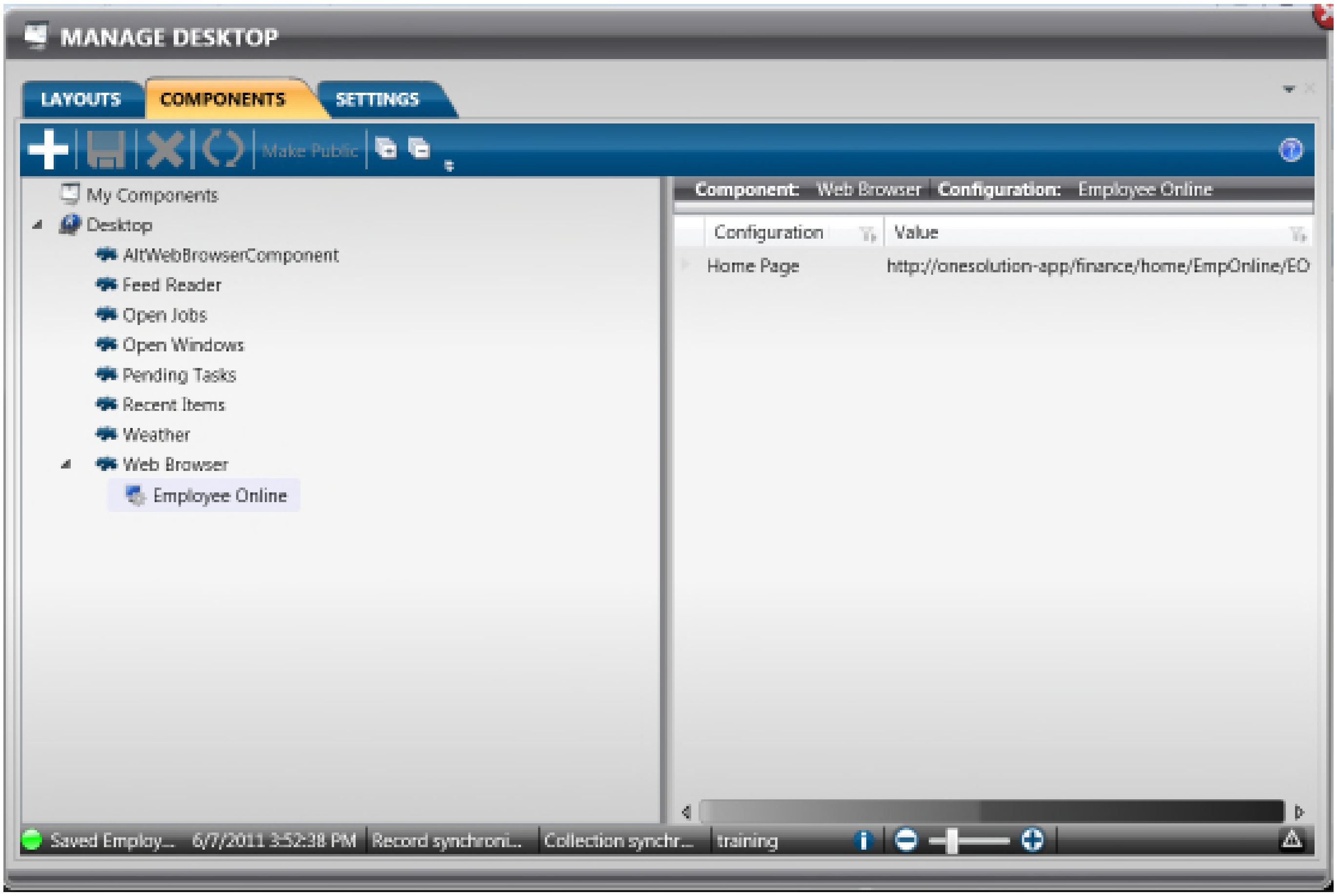


- Select Web Browser

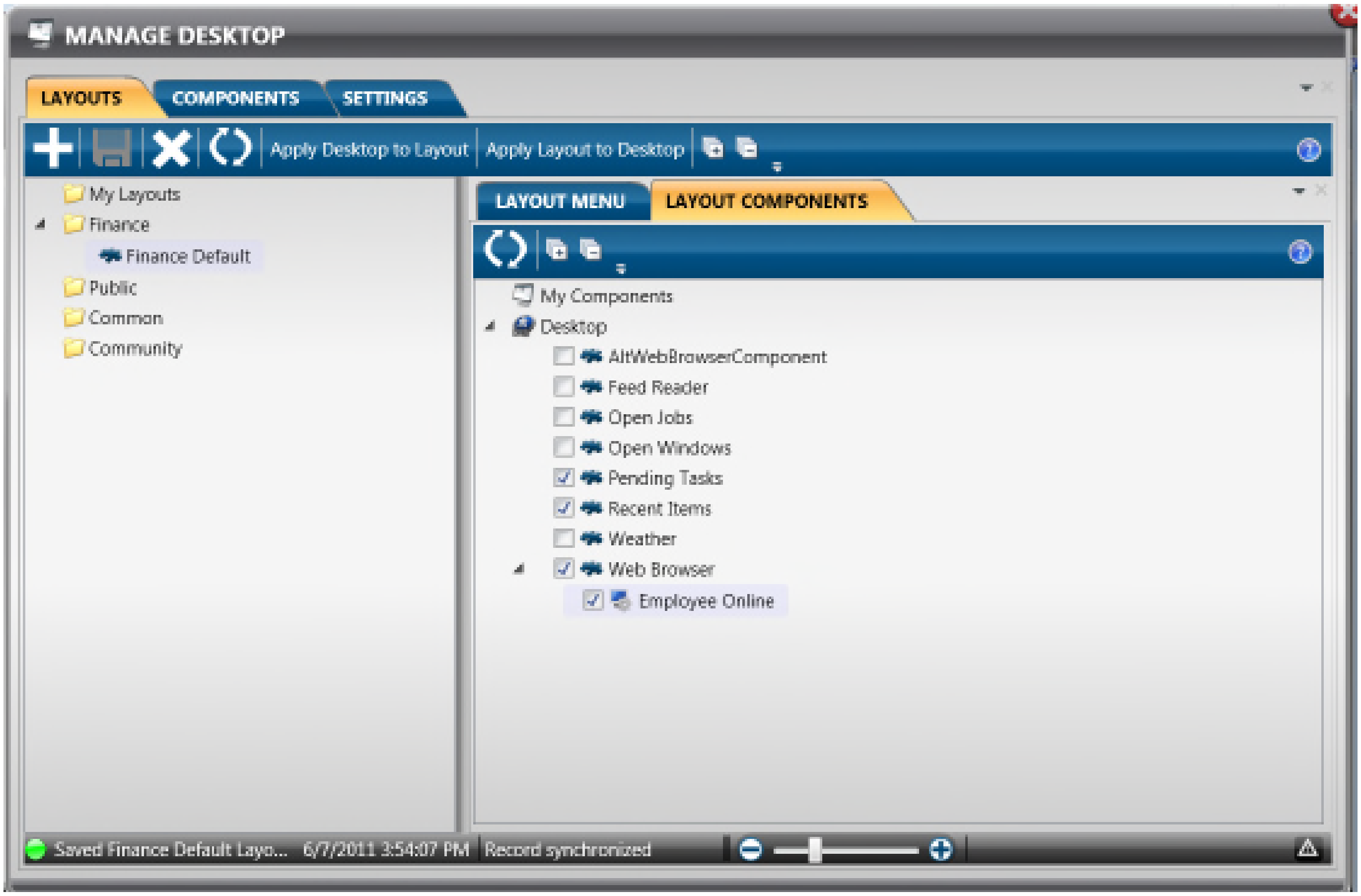
- Select the + Add option

    - You'll now notice under My Components, an additional Web Browser
    - To the right, you'll notice a default of a google url.
    - Click in the value field and change this to:
        - http://<server>/finance/home/EmpOnline/EOFrame.aspx

- Select the Floppy Disk to Save your URL
- Select Make Public, this will move the link from My Components to Desktop
- Double Click your new Browser and change the title to Employee Online
- Select Save to finalize



- Select the Layouts tab
- Select Layout Components
- Put a check in Employee Online
- Select Save
- Select Apply Layout to Desktop



<u>Employee Online Development Requests</u>**:**

Employee online has forms that will need tickets submitted to development. Submit a separate ticket for the EO stub when you request your EFL forms.

EO Check stub

W-2 Work Flow

<u>Employee Online Client Specific Files</u>**: In addition, to the Benefunc file there are other client specific files that reside in:**

C:\Inetpub\wwwroot\finance\EmpOnline\ClientSpecific foleder.

Employee Online Menu

The menul.xml file controls the Employee Online menu

The administrator has the ability to control the Employee Online features the user is exposed to through the site map and can even add in new web links that will take the user to outside destinations. The site administrator should modify <finance>/EmpOnline/ClientSpecific/menu.xml to configure the site map. In the following example you can see a custom entry highlighted in blue that will take the user to the external web site for CNN:

The Site Map assumes that URLs with relative paths (names starting with a period) are internal pages and when visited they will appear in the current application frame. The URLs that have full path names (like http://www.cnn.com) will be opened in a separate browser window. In addition to adding new page links the administrator can add new sections to the Site Map by wrapping pages in category tags. The names for the site map headings and links can also be customized in this file.

EOHomeWelcome.ascx

This file holds the content of the message of the day for message board page. It can contain any information that the EO administrator would like to communicate to someone logging on to Employee Online.

EOHomeInstructions.ascx

This file contains basic usage instructions intended to help EO users get acquainted with EO. EO administrators can put whatever they want into instructions files.

Headers / Footers Pages

The fields can be used to define further help pages or add headers and footers to specific EO screens. Templates for these files can be found in the directory: <finance>/EmpOnline/ClientSpecific. The name of the directory folder that holds these files, Client Specific, implies this area is reserved for Client use and the files located here will not be overwritten by software updates. Each Employee Online screen has a footer and header associated with it.

- **How to add a footer or header to an EO page**:

Locate the file of the screen you wish to add a footer or heard to located in: <finance>/EmpOnline/ClientSpecific. The file is an ascx extension file.

In the file, Look for a string “this.visible=false”; change the false to true.

Remove the comments from the string that begins “Label FooterMsg…”

Enter your footer in quotes after the string “FooterMsg.text=…” this uses html. You can look up html to define the color, font, and alignment. See example below for basic html language.

<p This is a paragraph</p> for the message

<font color=660000 660000=maroon colour, not entering any font specification will default to black.

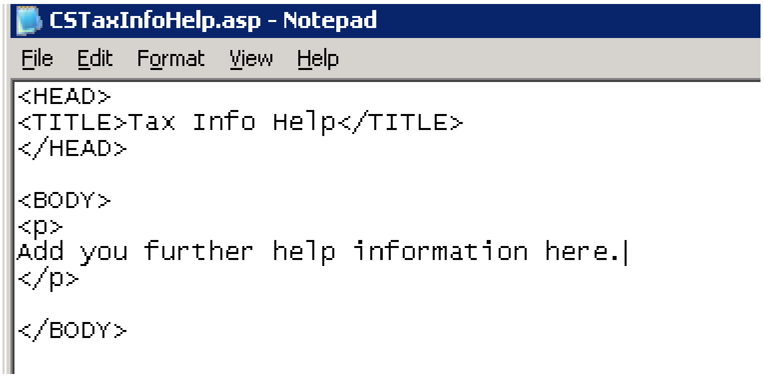
<align=center/> to center text on page. Default is left alignment.

<b>bold text/b> To bold the text.

- **To add a header, modify the appropriate EO header file.**

Help Pages

Locate the page in which you wish to add more help to located in: <finance>/EmpOnline/ClientSpecific. Use these help paged on each EO screen to include additional help. Help pages use the asp extension files.



```
<HEAD>
<TITLE>Tax Info Help</TITLE>
</HEAD>

<BODY>
<p>
Add you further help information here.
</p>

</BODY>
```

When an employee selects the more help link, a browser window will displaying further help information.

1. **PDF Forms**

   EO Forms menu holds PDF forms that reside in the directory. The actual forms will need to be saved under: <finance>/EmpOnline/ClientSpecific folder. EO stores forms in two areas.

   1. You can put forms under the Benefits menu:

   <finance>/EmpOnline/ClientSpecific/CSBenefitForms.ascx.

   2. You can put forms under a miscellaneous form menu:

   <finance>/EmpOnline/ClientSpecific/CSMiscForms.ascx.

2. **How to Add Miscellaneous Form**

   The Forms page utilizes the client specific file called, CSMiscForms.ascx, to list the available forms for download. The basic layout of the page is a table with two columns. The first column displays a clickable form name that links to a file within the EmpOnline\ClientSpecific folder. The second column displays a brief description of the form. Below is an example on how to add a form:

   Replace '*FormFileName.pdf*' in the file with the name of your form that you saved in the EmpOnline\ClientSpecific folder for EO to reference. This is the text that becomes clickable.

   Replace '*Description goes here'* to reflect the description of your form. If no forms are to be displayed, it is recommended to change the visibility state of the client specific page.

   To do this, change this line, in the file:

   this.Visible = true;
   To:
   this.Visible = false;

   This will causes the message 'No forms available' to appear on the page.

3. **Additional Client specific functionality has been added via the following files.**

   The following files are additional files that can be configured to reflect client's specifications.

   - **Deferred Compensation Screen**

Allows for additional where constraints on the fetch of data for the DefCompInfoIndex.aspx screen.

<finance>/App_Code/EmpOnline/ClientSpecific/ CSDefComp.cs

- **Employee Directory Screen**

Allows for additional where constraints on the fetch of Employee records for the Employee Directory page.

<finance>/App_Code/EmpOnline/ClientSpecific/CSEmployeeDirectory.cs:

- **Family Screen**

Provides a means of customizing columns on the initial Family page.

finance>/App_Code/EmpOnline/ClientSpecific/CSFamilyUtil.cs:

FamilyInfoIndex.aspx. The default version of this page shows a grid where each row represents a family member. The last column on the grid is titled Other Ins and contains a value of Yes or No depending on whether Primary Provider 1 or 2 has been populated. This client specific file allows you to override the last column with a title and value relevant to your site. An additional column can also be made visible if desired. Comments in this file show an example of how to accomplish this type of override.

16. Employee Online Administration

All Employee Online user accounts are maintained in the OS NUCLEUS subsystem, which provides a central one-stop location for maintaining user accounts throughout the OS and Dashboard applications. User accounts are stored in the us_usno_mstr table. An employee Administrator has several tools to maintain users and assist users in certain EO functions. Access to Employee Online is granted via the existence of an Association named EMPLOYEE with the value being the Employee's ID. Administrative access is granted using an Association named EOADMIN again with a value of the Employee's ID.

1. Create New Users

The NUCLEUS subsystem contains a tool called Create New User IDs (menu mask NUUTNU) which automatically creates User accounts from employee HR records. Employees can be migrated using a variety of selection methods and criteria.

Configure the following common codes before you create your new user accounts:

NUFG/NU945C and NUSC/NEWUSEREO. Please refer to the NUCLEUS Common Codes documentation for more information.

This Utility creates new Nucleus Users based on rules defined on a template user. In NUUPUS, you will create a new template user with the appropriate association 'EMPLOYEE', Status of P to force a change of password, and give the appropriate security restrictions. Employees must be given an initial password with which to logon, (SSN or employee ID). An organization will have to determine how to generate these initial passwords and communicate them to the employees.

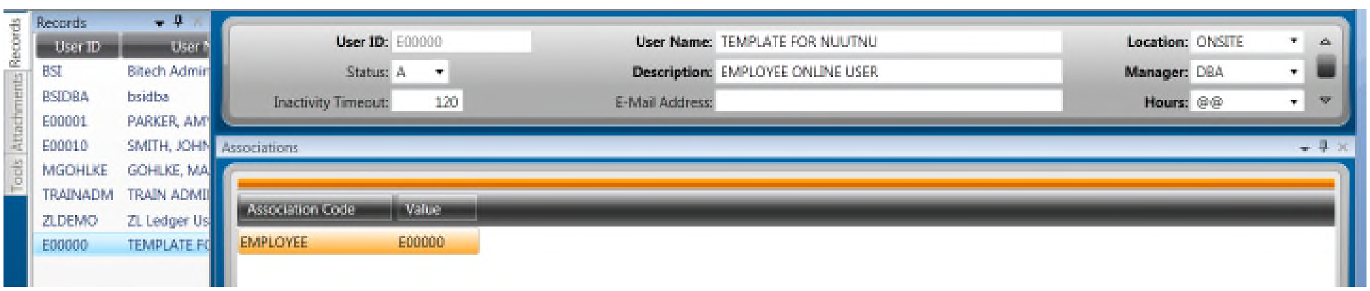
The utility will copy all of the Template User's information **EXCLUDING** the following:

- us-no (user number) which is newly generated if this is a new employee
- us-id is set to the new ID of the selected user
- us-pw and us-pwhex are set to the determined password
- us-pw-dt is set to 5 years prior to the current date. This is done so that if password duration is specified then it will automatically require the user to reset their password upon initial login and every time that duration is met.

If the user is already defined then the utility will copy any missing associations to the new user.

If the user wants to run a trial to see what is going to happen a question has been added so no changes will be made and just the report is created.

Give your Template user the appropriate association and security



Run the create new user utility NUUTNU

Select your Module and your selection criteria to specify for which employees to create new user accounts. Enter the template ID you created in NUUPPU for the utility to use. This utility has an option of running in a test mode, check the box next to No to change to Yes and run in test mode. And print in Archive to view report.

2. Impersonate User Tool

This impersonate user tool allows an Employee Online Administrator to search for an employee and assume their identity temporarily, for troubleshooting purposes. The criteria that may be used to search for an employee may be any combination of their partial or full Employee ID, First Name, Last Name, and Social Security Number This is most useful when trying to track down problems experienced by a particular user.

3. Password Maintenance

Employee user accounts are maintained through the Portal User Settings, NUUPPS. Employees login to Employee Online using their employee ID and a Password. By default, all employee passwords are encrypted. It should be emphasized to the employee that this password should be kept secret as it represents access to sensitive payroll data.

Reset Password

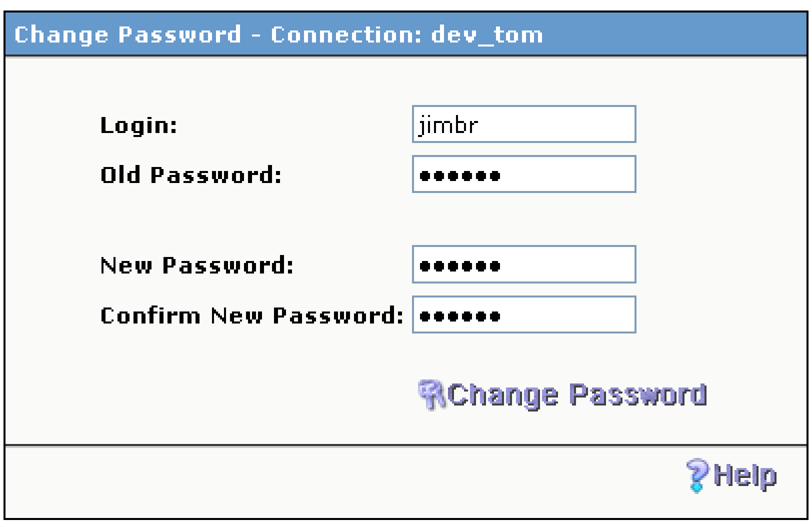
In the case of a new employee (or an employee forgetting their password), an EO administrator can open the Set User Password tool from the NUUPPS screen to set or reset the employee's password.

Force Password Change (expire password):

By changing the user's status to 'P', an employee's password is immediately set as expired. The next successful logon will force the employee to pick a new password. This expiration along with encrypting the password can ensure that only the employee knows what the password is, thus strengthening the audit trail.

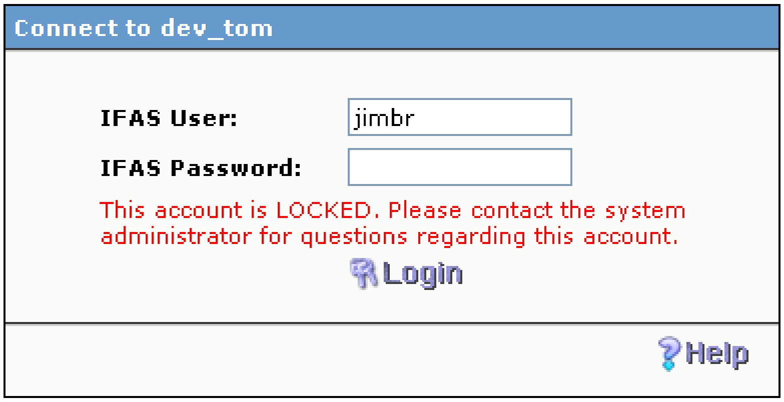
Password Expiration (days before password change is required):

This setting limits the number of days a password may be used before it must be changed by the employee. The login process checks the number of days since the Last Password Change and compares this to the Password Expiration amount – if the amount is exceeded, the user will be prompted to change their password upon the next successful login. A value of 0 disables this restriction.



Lock Account:

By changing the user's status to 'L', the employee's account is locked. The employee will no longer be able to log into the system until the status is reset to active by an administrator.



4. **Additional Password Restriction**

Including password complexity requirements, password re-use limits, and maximum failed login attempts are configured via the NUPW/VALIDATE common code. Please refer to common code setup section

5. **HR Approval Utility (HRUTAU)**

The Approval code utility screen is used to globally update approval codes based on selection criteria. Based on the value selected in the screen selection combination, the utility will updated approval codes for the follow screens:

Screen	Mask	
Employee Master	HREMEN	
Taxes	HRPYMD	
Employee Pay Assignments	HRPYPA/QP	
CDH Assignments	HRPYCA	Misc, Direct Deposit, TSA and Bonds Tabs

The records to be updated are filtered based on the criteria specified in the global selection criteria section, which is applicable to all the functions. Function specific filtering has to be entered in the section specific to the screen. The processed records are logged and can be viewed on the Approval list screen which is accessible via the link on the Approval utility screen. Utility can run in test and actual mode. In test mode, function specific records are not updated; they are just logged in the approval list table.

This utility will run only in add mode and does not have a test mode.

17. **<u>EO Mapping</u> :** EO screens read information form the HR subsystem. When a non benefit change is made on EO it will map to the related HR subsystem screen and update HR screen with the appropriate EO action code (EOU, EOA, or EOC).

EO Screen **Displays from**

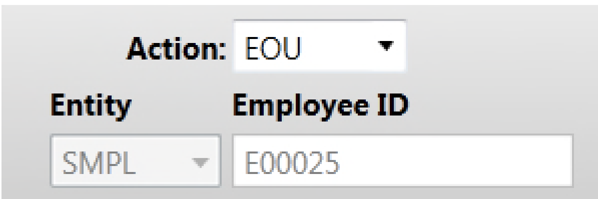
EO Employee Directory	HREMEN
EO Home Address	HREMEN Address Info Tab and HREMPR Additional Addresses
EO Emergency Info	HREMPR Emergency Tab
EO Family Info	HRPYBE Family Tab
EO Direct Deposit	HRPYCA Direct Deposit Tab
EO Savings Bonds	HRPYCA Bonds Tab
EO Deferred Comp	HRPYCA Tax Sheltered Annuities Tab
EO Pay Stub	HREOTR EO Employee Info/Check Stub
EO Tax Info	HRPYMD Primary Taxes Tab
EO What If	Execution of Payroll Force Calc
EO W2	Documents Online W2 data
EO Current Job	HRPYPA
EO Historical Jobs	HRPYPA records
EO License/Cert	HREMES License/Certifications Tab
EO Skills	HREMES Skills Tab
EO Courses	HREMES Course Units Tab
EO Tuition	HREMES Tuition Tab
EO Education	HREMES General Tab
EO Training	HREMES Training Tab
EO Term Life Insurance	HRPYBE Term Life Insurance Tab
EO Administrator Settings	Various EOCD Common Codes

Non-Benefit Change Request Mapping

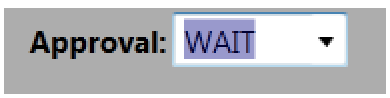
An employee makes and saves a new change, the record is accepted and the status on the record changes to pending.

EO marks the corresponding HR record(s) with the employee's user name.

EO also places a value of EOA (for add), EOU (for update), or EOC (for close) in the action code. EO generated records have a value of 'WAIT' in the approval code.



These traits make it easy to QBE (query) for records which have been generated by Employee Online. While in 'WAIT' mode, the user's request is visible in HR but is not sent to the PY database.



HR/PY personnel must reject or approve an EO request. Approvals are accomplished by changing the 'WAIT' to 'SEND' on the record and pressing 'Enter'. This action will fire the transaction codes for that screen and send the appropriate information to payroll.

Rejecting or modifying a request entails adjusting values on the record to acceptable values.

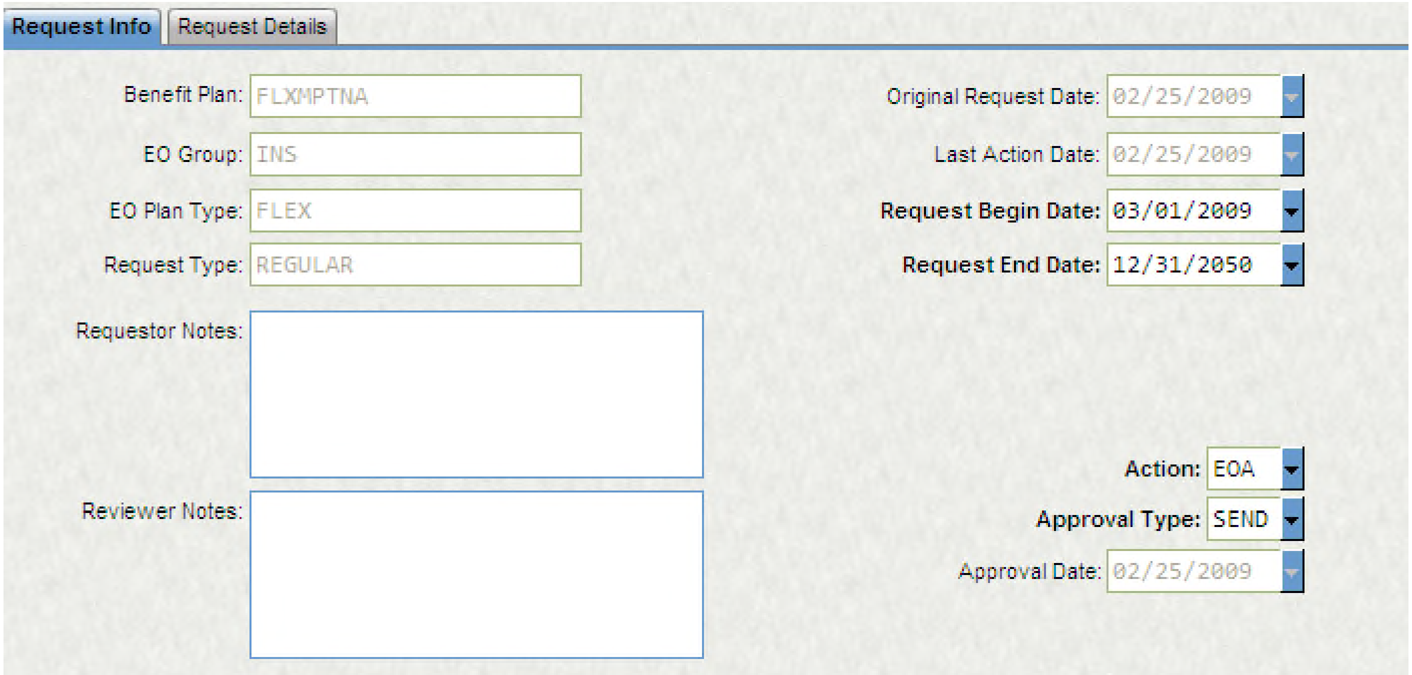
This implies that logging should be turned on for all tables associated with EO.

Benefit Change Requests Mapping

EO Benefit requests are written to an EO transaction screen (HREOTR) under EO Requests tab. The EO transaction screen allows an approver to evaluate a request and carry out an approval on a single before it reaches the BENEINFO screen. Since the original BENEINFO information is still in place, rejections are not an issue for Benefit.

The request from EO will display on the Request Details tab.

The original benefit information is left untouched on the BENEINFO or CDHASSGN screens until the request is approved on HREOTR under Request Info tab. Approval is accomplished by placing 'APPR' in the approval code and pressing enter then status is changed to send with an approval date.



This action signals the approval business rules to execute. In the case where the Benefit maps to a BENEINFO record, the transaction codes close the original BENEINFO and creates a new record reflecting the request.

In the case where the target benefit maps to a CDHASSGN (which can only occur once for a given employee and cdh number) the CDHASSGN record is modified with the new request information and marked with the appropriate begin date.

Approval on the transaction screen also manages entries in the DEPDBENF table if necessary and moves the new benefit information over to PY for use in payroll calculations.

18. Frequent Questions Asked (FQAs)

- What happens when an employee makes a change or addition to benefit plans in EO?

All benefits requests are written to this table with an approval code of WAIT. You can see more details about the request by putting a Y In the See Details field. After the cutoff date or open enrollment period ends, you would approve the TRNSREQS by placing APPR in the approval field. This will write the benefit into BENEINFO as well as sending it directly to PY. Once it finishes successfuly the approval code changes to SEND. All EO approvals should happen after the cutoff date.

- How do I launch PDF forms in a separate window?

If you put target="_new" in the anchor it will cause a new window to open…

 url text

- How do we handle benefits that don't address who is covered?

EO requires each plan to be mapped to a category that indicates coverage type. If there are multiple plans that do not have any concept of coverage levels the file jsutil.txt in employeeonline/include must be updated to reflect this. This will also make the plan description from BENETBLE show as the description in employee online instead of the category.

- Is there a max number of records that can be entered in EOBEMSTR?

Currently this is set at 40 in the file beneutil.asp in employeeonline/include. To increase it open this file, search for all occurances of 40 and change to a higher number. This will need to be updated after updates though.

- How does Employee Online know whether a direct deposit is a net, flat, or percent amount?

You need to indicate with the Special Cd 1 field on HRPYCA whether that direct deposit is a P (percentage), A (flat amount), or N or blank (net amount). Then in the EOCD / DIRDEP common code you can define how EO should display and treat these codes.

Also, this should be used in order to tell Payroll whether direct deposits are percent, net, or flat amounts. Below is the calc code that you can use on your direct deposit deduction definitions to calculate this in payroll:

```
<< EFT Calculation Code >>

<< Based on Special Code{1} determine deduction amount >>

<< P = Percent  A = Flat Amount  N or blank = Net >>


IF EDED.CD{1} = "P"

  NVAR0 := EDED.AMT * PBSX.PTD

  ROUND2(NVAR0)

ELSE

  IF EDED.CD{1} = "A" AND EDED.AMT > 0

    NVAR0 := EDED.AMT

  ELSE

    IF EDED.CD{1} = "N" OR EDED.CD{1} = " "

      NVAR0 := PBSX.PTD

    ENDIF

  ENDIF

ENDIF

DEDX.AMT := NVAR0
```

- Is Employee Online in compliance with the IRS Electronic Signatures?

Yes, our product team has reviewed the requirements and believes that we are in compliance with the IRS regulations. If you have concerns about your agency's compliance, we encourage you to get pre-approval of your online change procedures from your legal department.

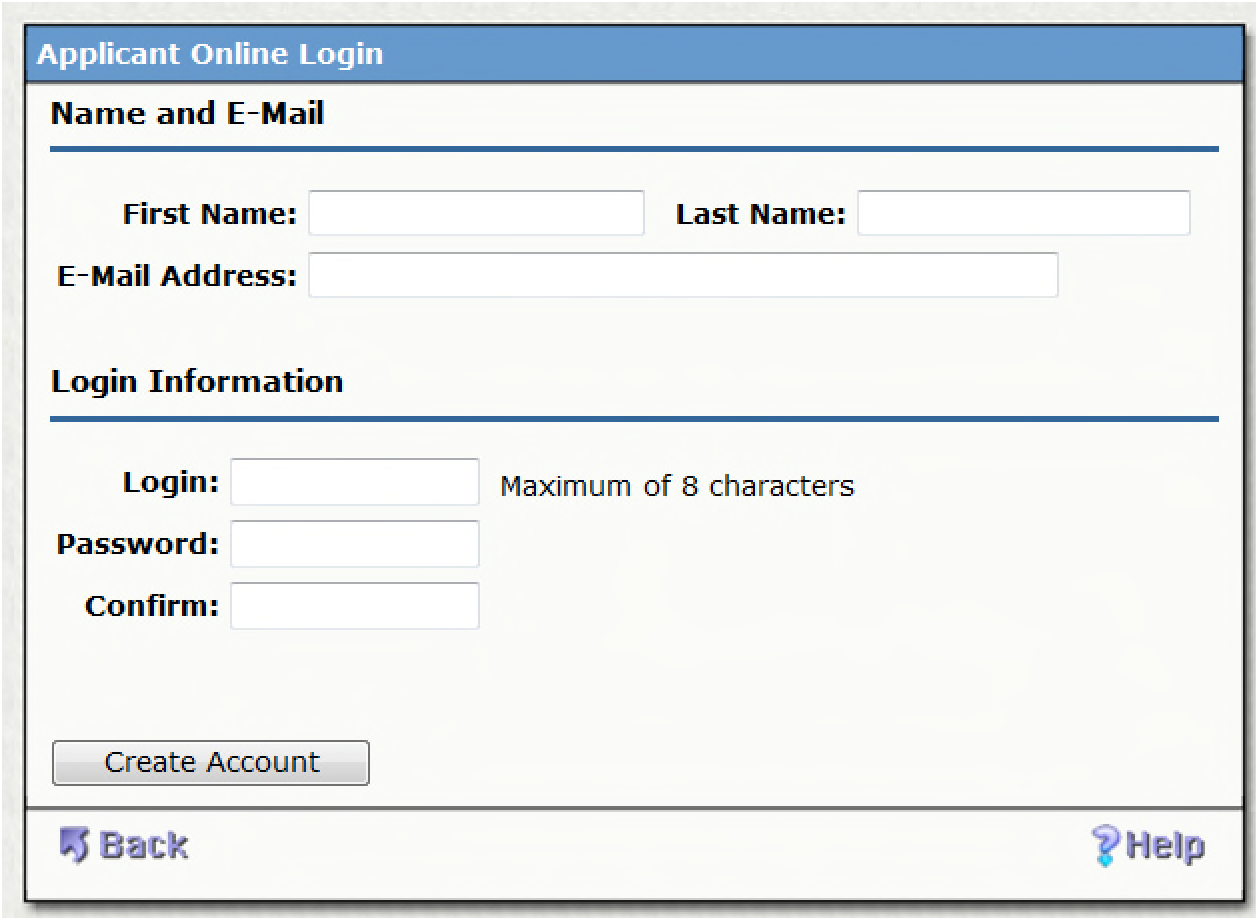
- Does employee online keep a record of the change history?

When a change is made from Employee Online ONLY for benefits, a transaction record number is created for the changes is created in the HREOTR screen and that is where the changed information history will reside.

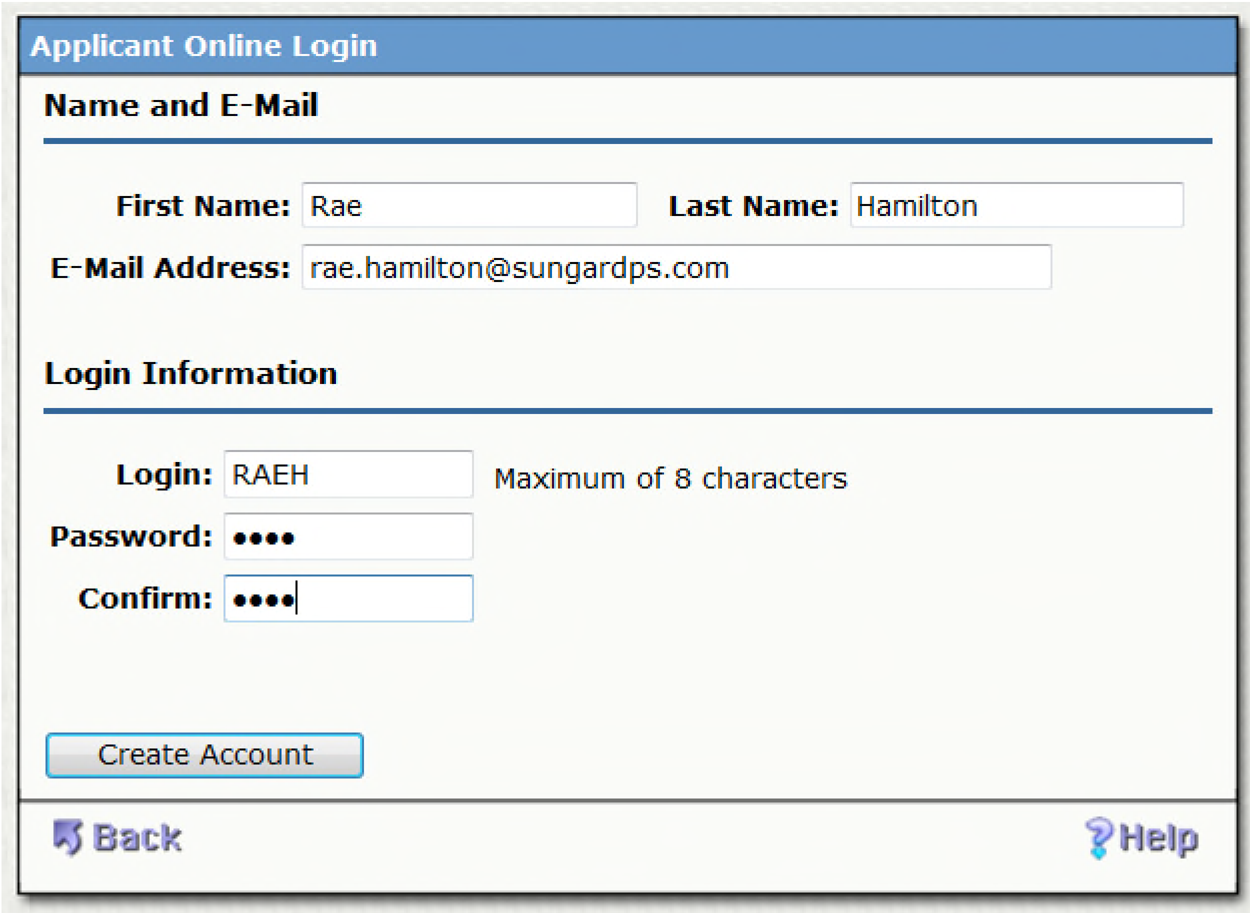
Section 4: Applicant Online User Manual

1. Enter your user name and password

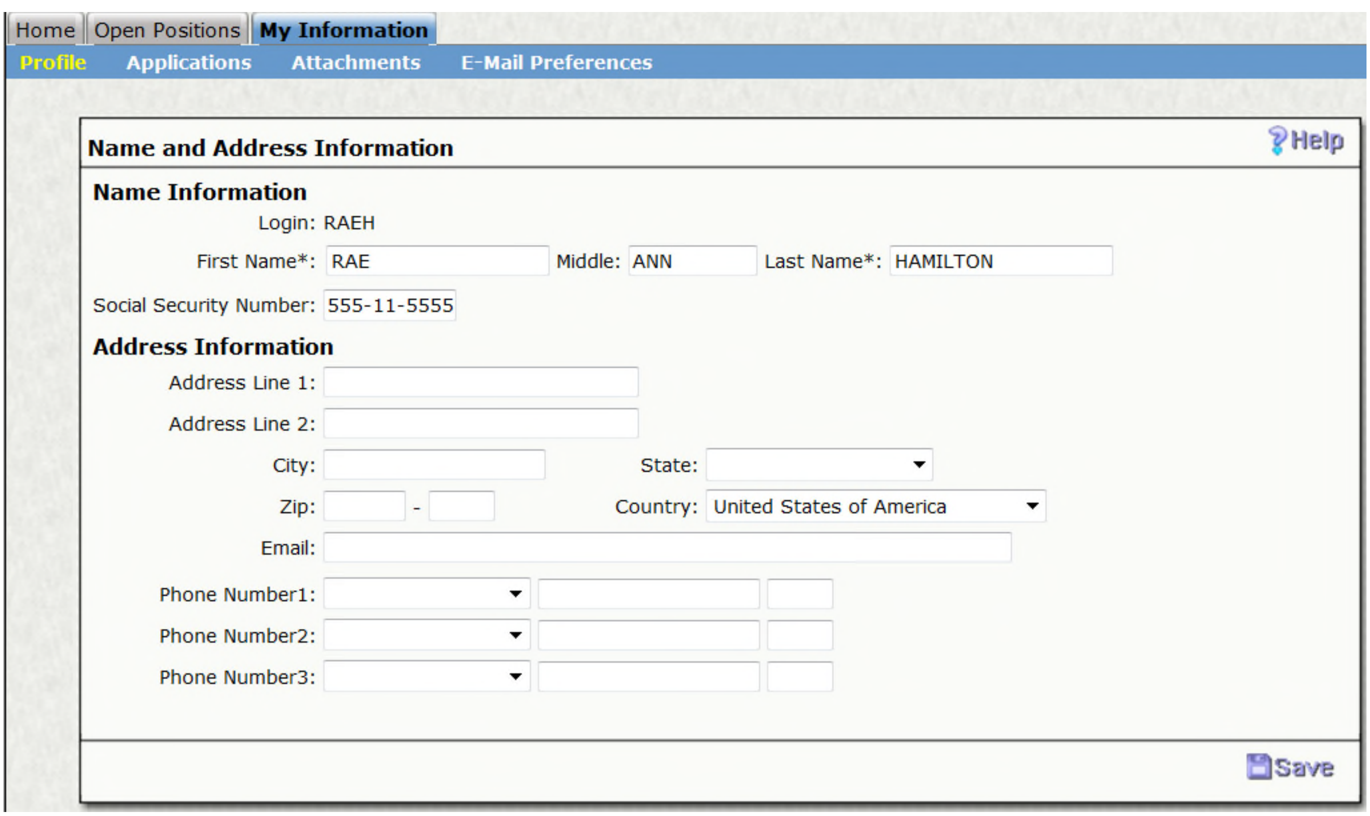
2. For new users, select the Create New Account



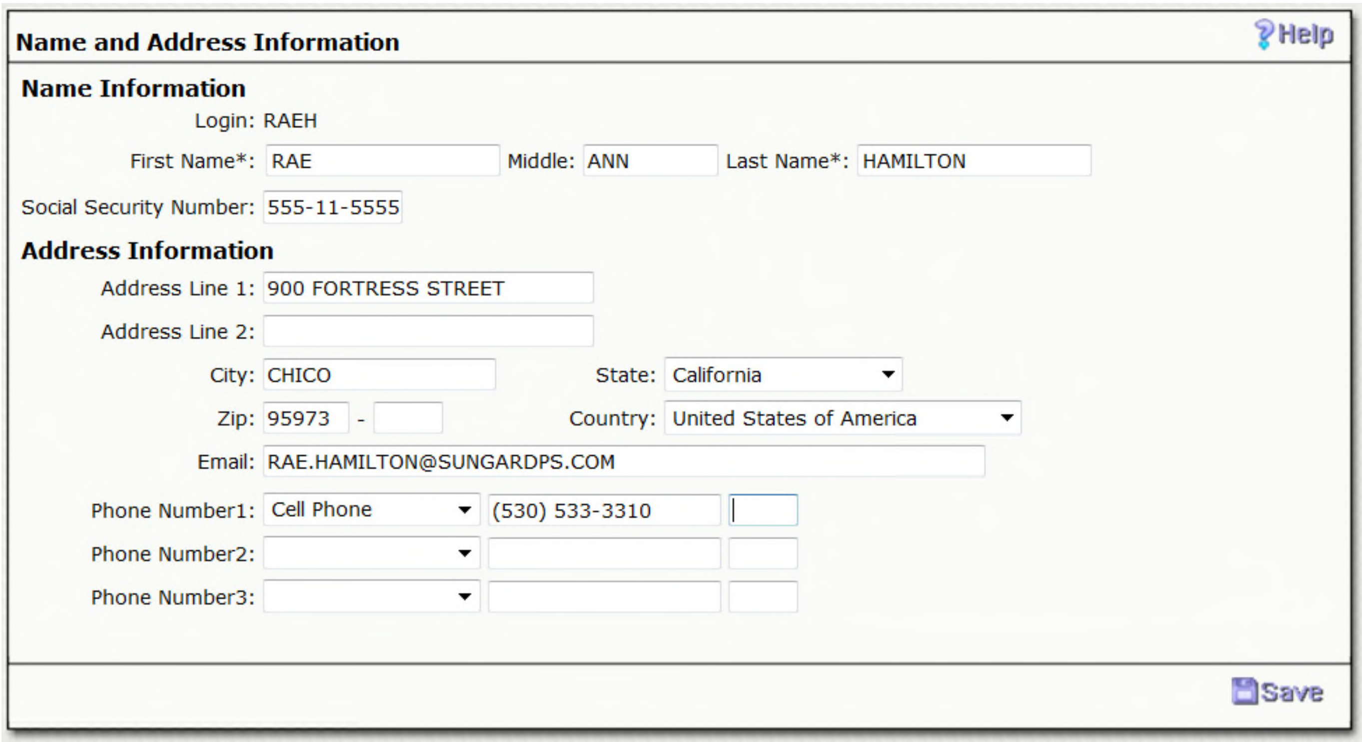
3. Enter your First and Last Name and an E-mail Address
4. Create a Login and Password
5. Verify your password
6. Select Create Account



Now you will be asked to enter more demographic information



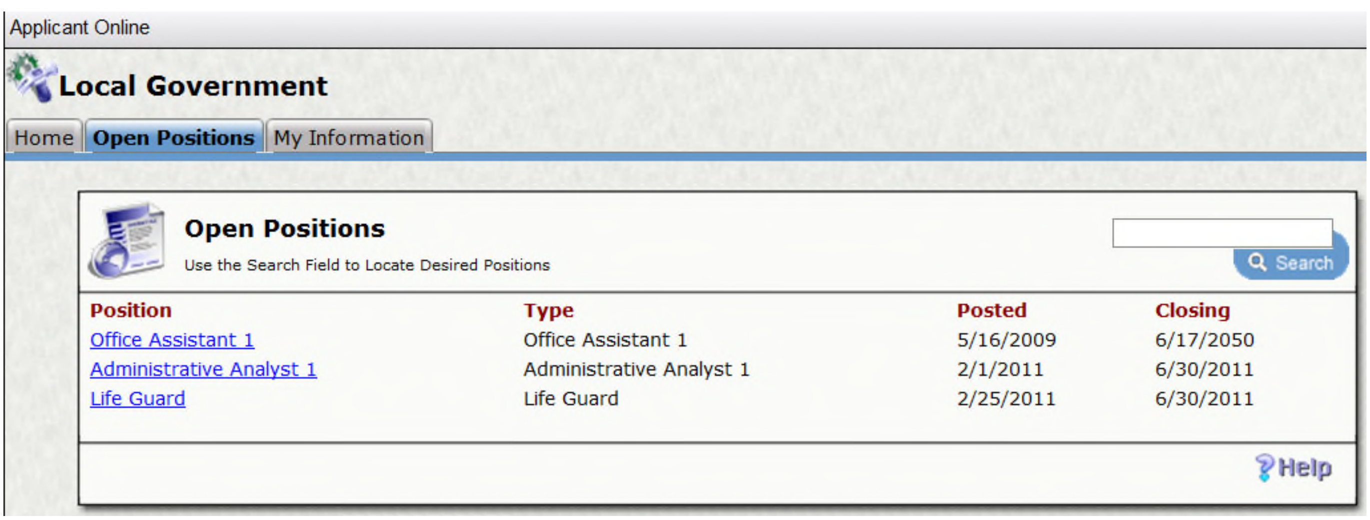
7. Enter your address and phone numbers that the HR Department will be able to use to contact you.



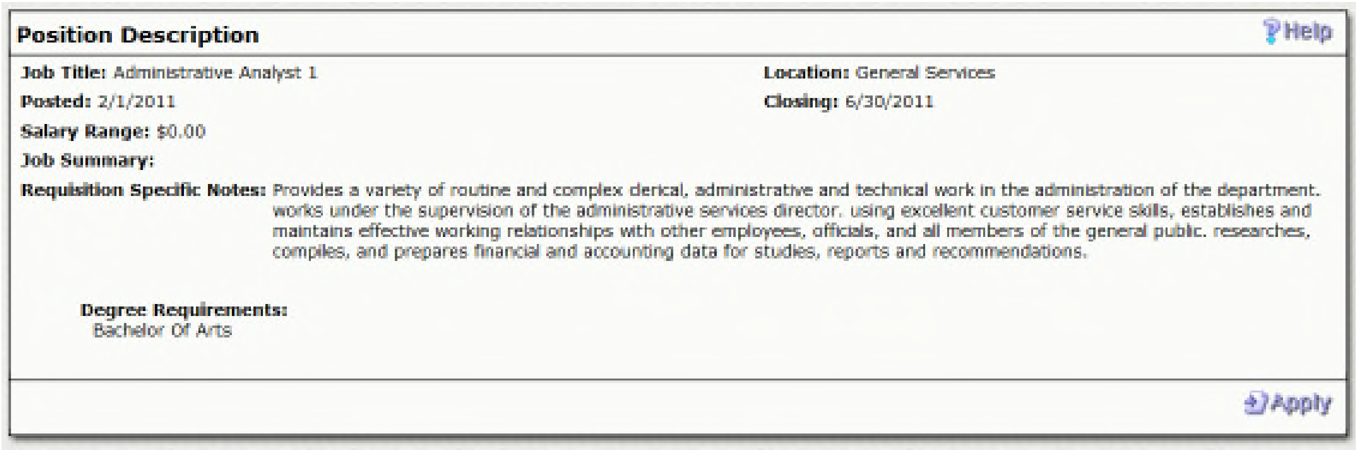
8. Select Save

Your profile is now created and you are able to apply for positions.

9. Select the Open Positions tab to view all open positions



10. Select the position that you would like to apply for.



Position Description

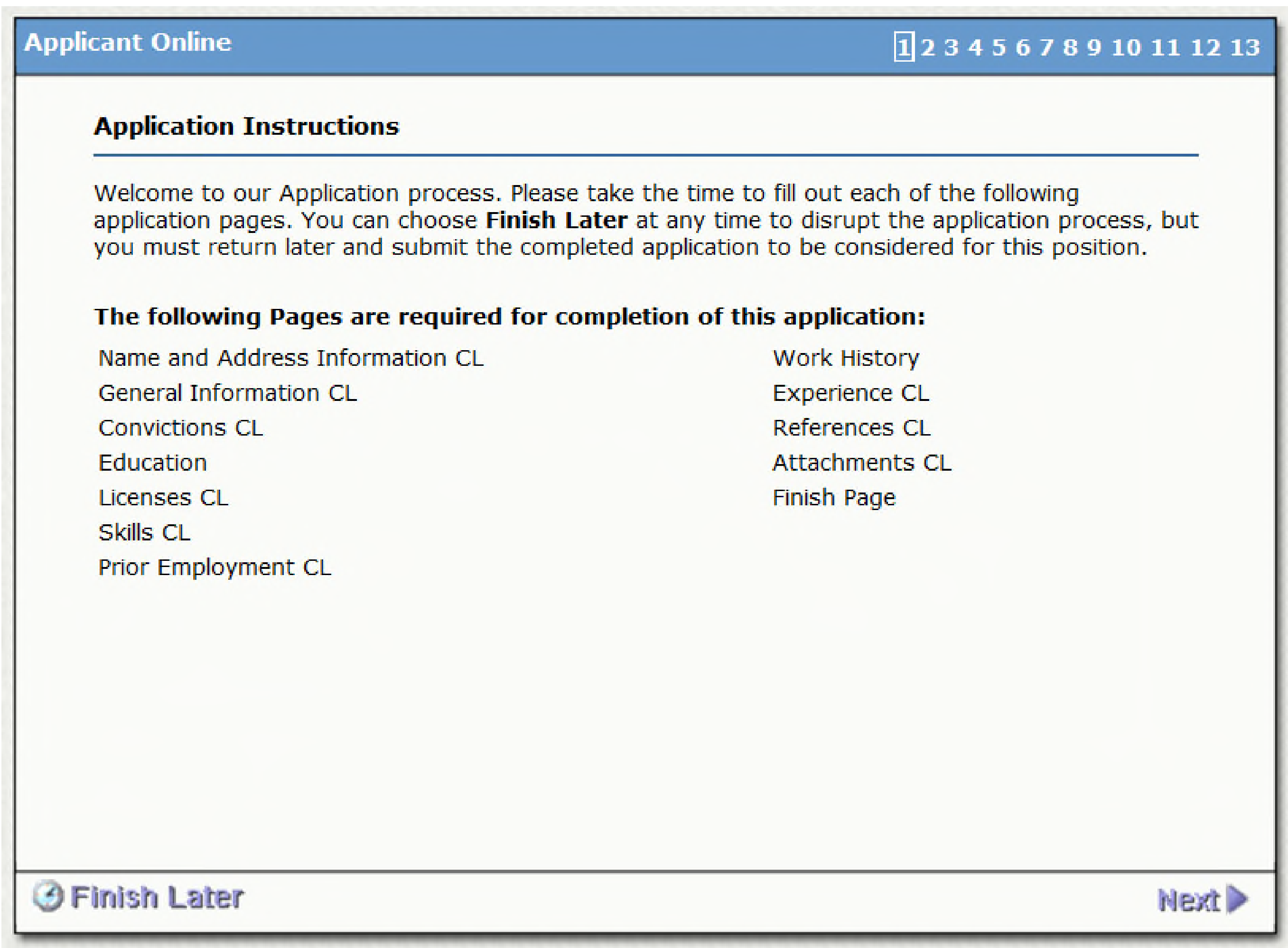
Help

Job Title: Administrative Analyst 1
Location: General Services
Posted: 2/1/2011
Closing: 6/30/2011
Salary Range: $0.00
Job Summary:
Requisition Specific Notes: Provides a variety of routine and complex clerical, administrative and technical work in the administration of the department. works under the supervision of the administrative services director. using excellent customer service skills, establishes and maintains effective working relationships with other employees, officials, and all members of the general public. researches, compiles, and prepares financial and accounting data for studies, reports and recommendations.

Degree Requirements:
Bachelor Of Arts

Apply

11. Next select Apply



Applicant Online 1 2 3 4 5 6 7 8 9 10 11 12 13

Application Instructions

Welcome to our Application process. Please take the time to fill out each of the following application pages. You can choose **Finish Later** at any time to disrupt the application process, but you must return later and submit the completed application to be considered for this position.

The following Pages are required for completion of this application:

Name and Address Information CL
General Information CL
Convictions CL
Education
Licenses CL
Skills CL
Prior Employment CL
Work History
Experience CL
References CL
Attachments CL
Finish Page

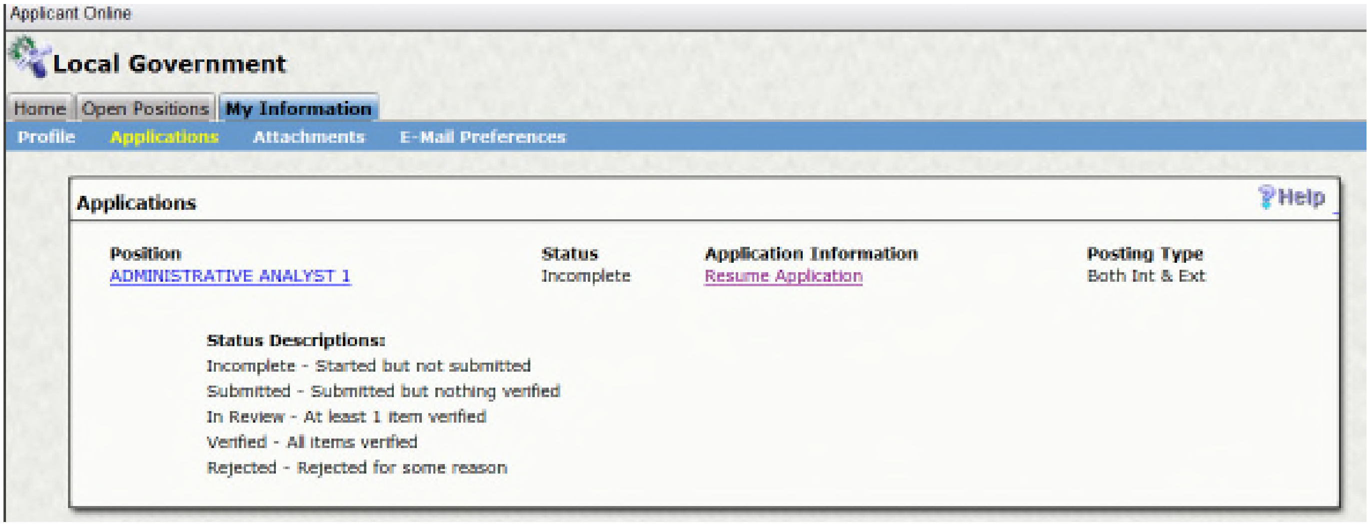
Finish Later Next

You will now be required to go through each of the organizations custom applicant pages by selecting the next icon.

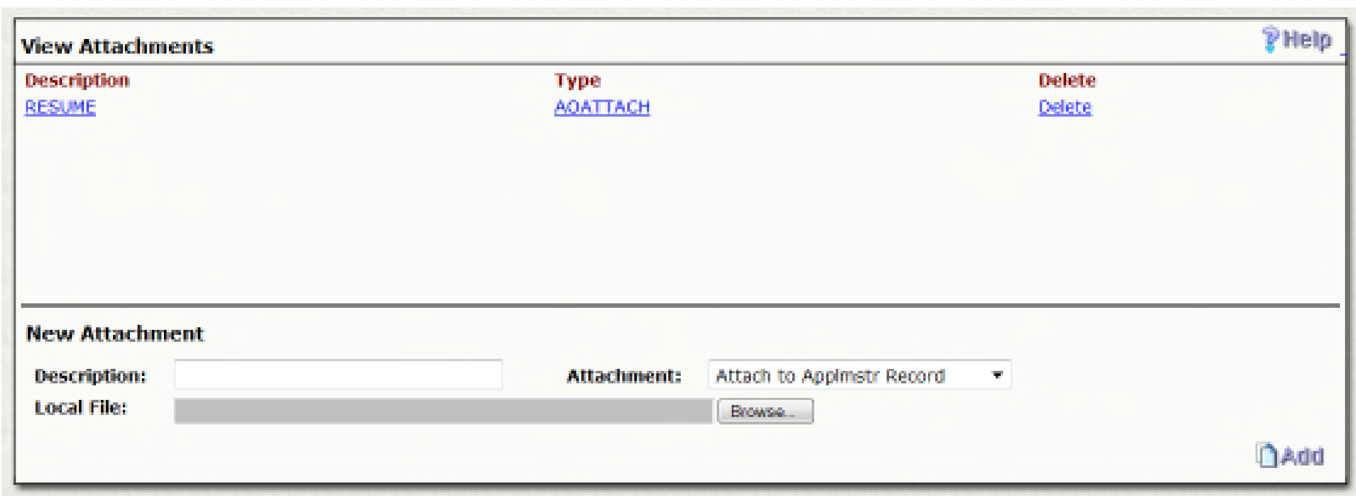
At any point, you may choose to Finish Later and all of your answers will be saved to that point, the next time you access the application, you will be asked to start where you left off.

An (*) signifies that a response is required prior to moving forward.

12. Select Applications to view all positions that you have applied to



13. Select Attachments to attach any documents that you would like the HR department to have access to. By attaching here, HR has direct access within their Applicant Tracking module.



14. Select E-Mail Preferences to sign up to be notified with open positions at the organization.

15. Be sure to keep your phone number and e-mail address up to date under your Profile, this will directly update HR’s records.

Section 5: Applicant Online Set Up

Overview

Applicant Online is SunGard Public Sector's fully automated applicant processing solution. It not only enables you to better locate the most qualified applicants by automating the initial recruitment process, but also significantly reduces the data entry burden on your HR staff by requiring applicants to take responsibility for entering their own application information into the system. You may choose to require staff to review and verify applicant information before it is transferred into the system.

Every Applicant Online screen is highly configurable. The Applicant Online system is custom built by SunGard Public Sector for your particular institution with the data you provide. You may include text and photographs in your AO system pages.

Purpose

Each time an applicant applies to a position that was posted by your organization through Applicant Online, their applicant is not only available in a paper format but also the information is stored in the Human Resource module called Applicant Tracking. Any information that is stored in Applicant Tracking and is duplicated in the Human Resources Tracking Screens will be transferred to the module when an applicant is hired.

Objectives

- Applicant Public Pages
- Administrator's Internal Pages
- Applicant Tracking
- Required Setup
- Table Setup

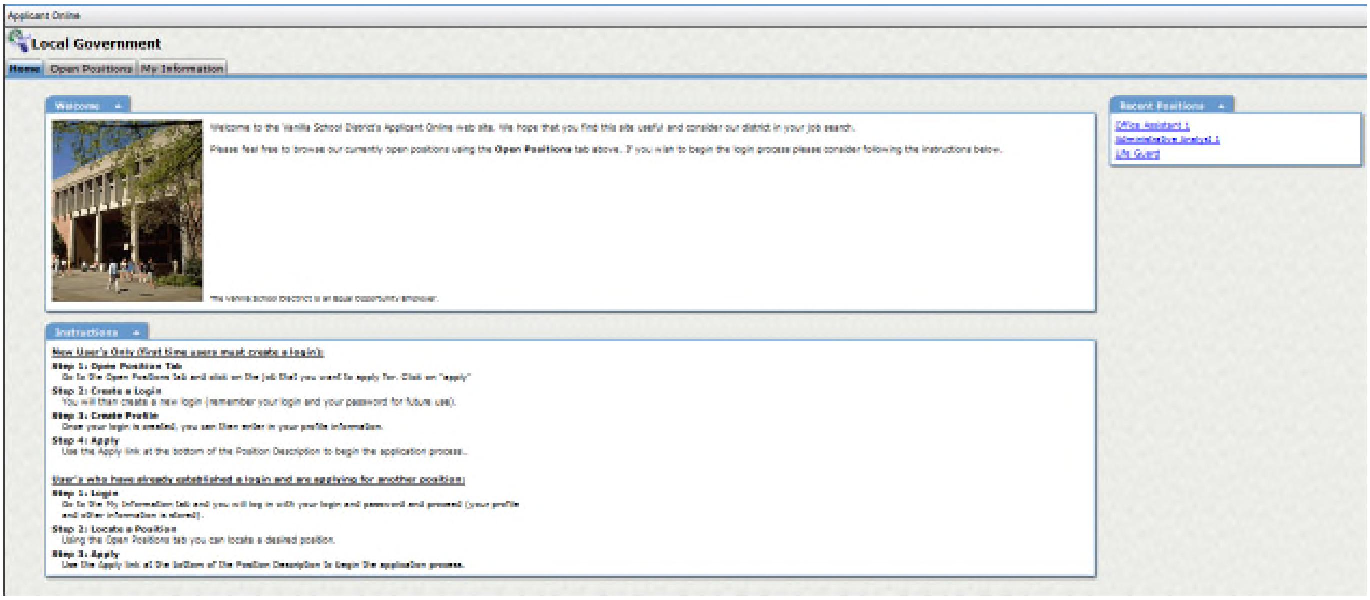
Key Features

- Applicant Online
- Captures Applicant Information in IFAS
- Hire the Best Qualified Applicant
- Reduce the Data Entry for a New Hire
- Ability to Create Eligibility Lists
- Applicant Public Pages

The Applicant pages are the screens within the AO system that are used for recruitment purposes. These screens include lists of current openings and detailed job description views. They also include the login screen, and all of the applicant information screens.

Home

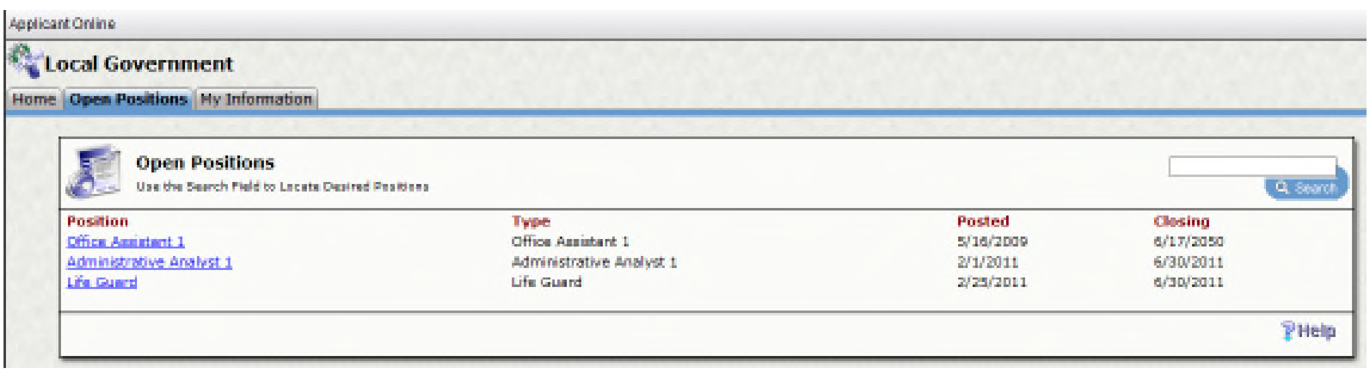
Applicant Online will start with the Welcome Page, the Recent Positions menu will list the most current jobs that have been posted along with a customizable welcome message. There is also an area that allows for instructions on how to utilize Applicant Online as an applicant.



a. Open Positions

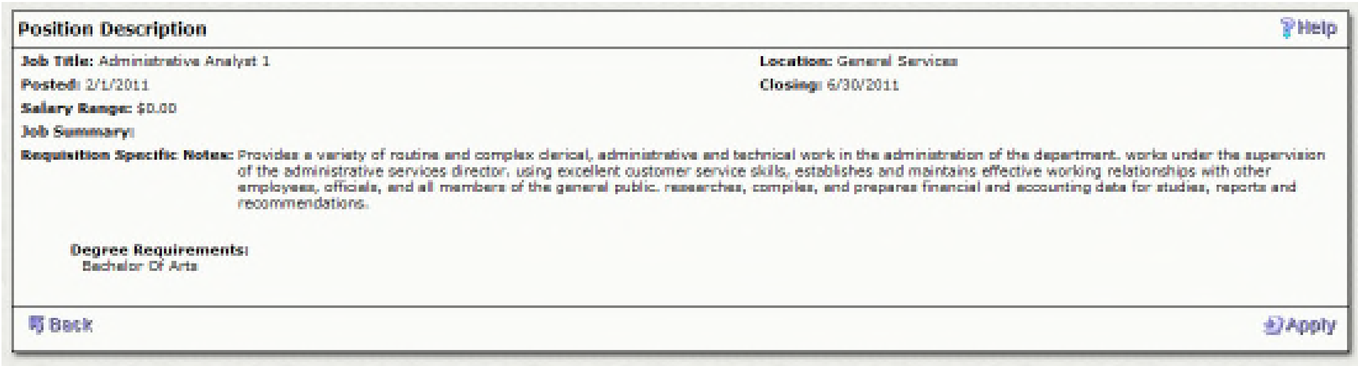
The Open Positions tab provides applicants with a basic list of open positions with hyperlinks to the Description page for that position. The Open Positions tab lists the same positions currently active as the Recent Positions box however, this tab provides more detail.

Applicants may view the detailed record for the positions that interest them by selecting the hyperlinked position. You can decide what information to include on this screen, but a basic example is show below.



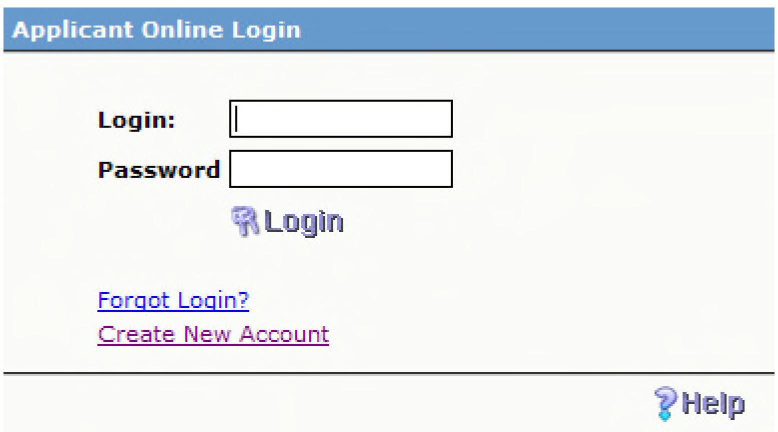
By selecting the position, the applicant will be able to see the detailed panel.

Note the view includes details about the position and the necessary qualifications. A link to the online help is included to provide the applicant with general information about this page and a back button is provided to enable applicants to navigate back to the Open Positions screen if they wish to look for other positions. This data is all pulled from the Requisition Definition screen.

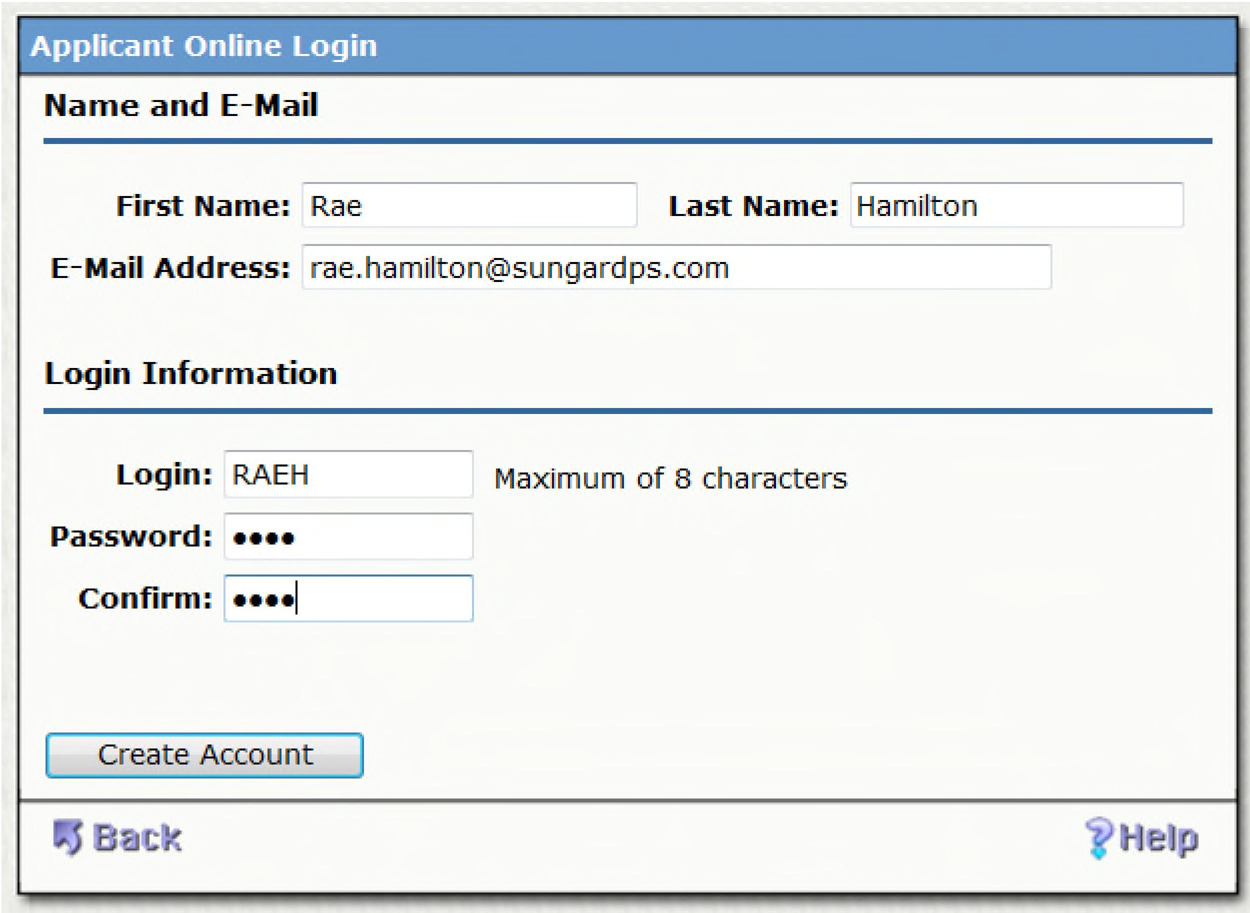


b. Login

The Login screen uses the Admin Console security to verify existing accounts and allows the applicant to create an account if they wish. It is launched when the applicant clicks the "Apply" button if they have not previously logged in. It may also be launched by clicking the Profile link on the "My Information" tab. Existing users may login with a valid password and new applicants may click "Create New Account" to launch the Applicant Wizard.

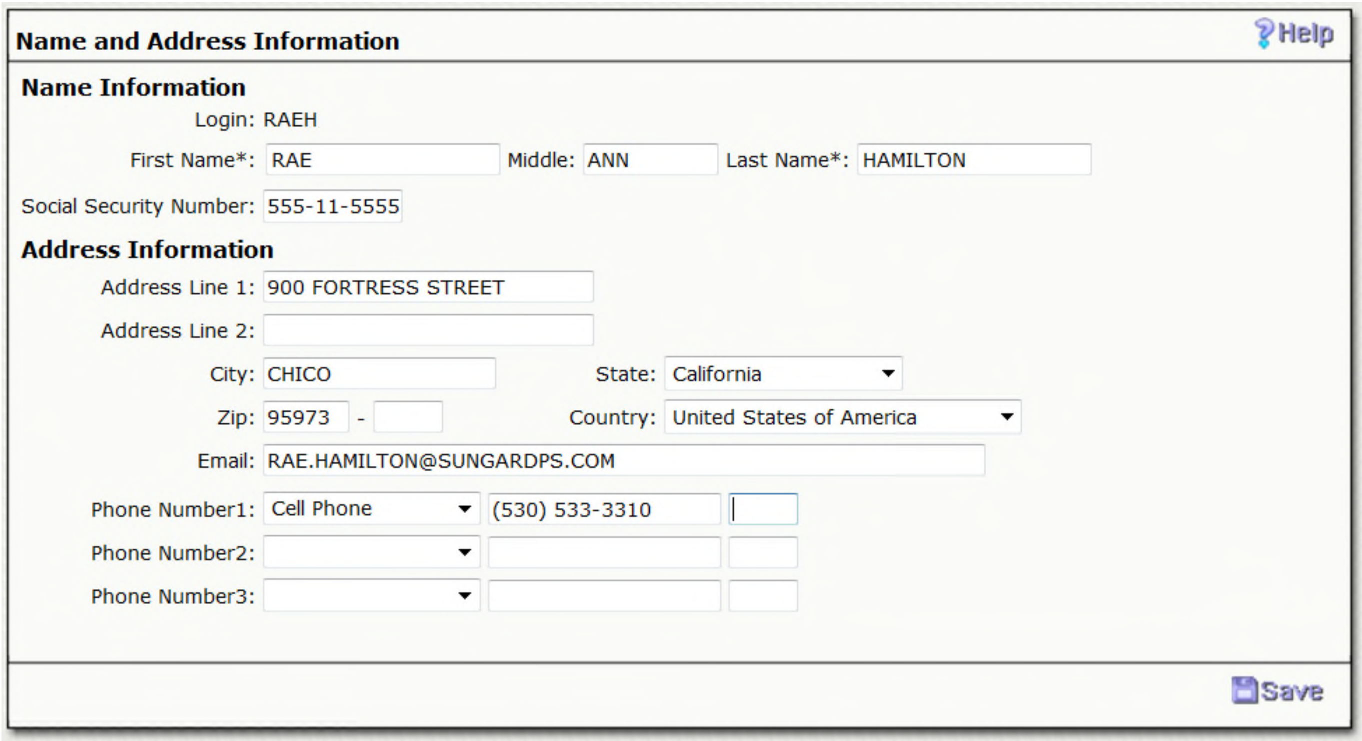


By clicking Create New Account, the applicant is prompted to enter username and password information. If the applicant forgets this login information at a later time, they can choose the 'Forgot Login' link. This triggers a workflow process that sends the login information to their email address stored in the Applicant Master screen.



Once you login the wizard will begin on the Application Instructions page. Read it over and hit Next. The pages will show up in the order listed on the Wizard Instruction Page.

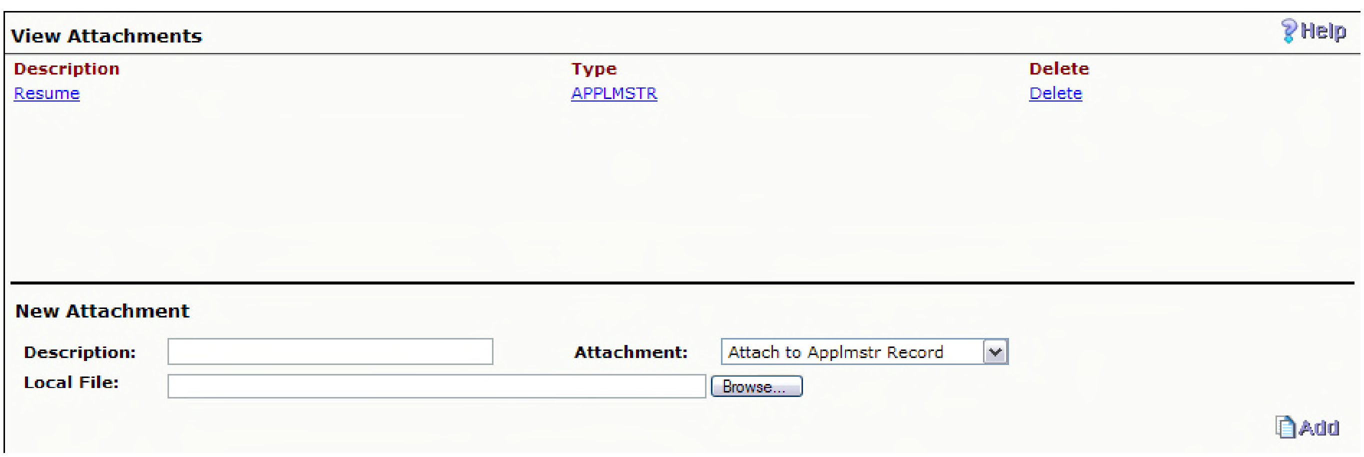
Applicant Online is driven entirely by workflow. When creating positions (HRTBPC), you are required to enter a Position Type. This position type (4 char) must begin with CE, CL, or CY, and you can define the last 2 characters. The position type flows into the Applicant Tracking Requisition Definition screen. The position type must match between the Position Code Definition and the Requisition Definition screens. Depending on the position type, the workflow will take the applicant on that application route.



The Name and Address screen are accessed via the **My Information** and then **Profile** tab and is the second screen used for creating applicant profiles. After this screen is completed and saved, it will automatically be attached to the applicant's record on the Applicant Master.

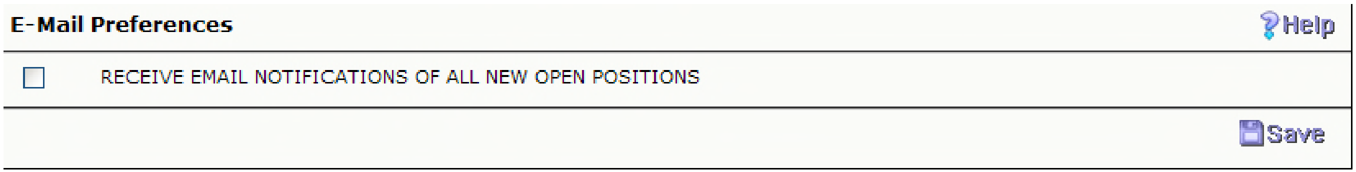
c. Attachments

The **Attachments** page enables applicants to add information files, such as a resume, to their applications.



d. Email Preferences

The **Email Preferences** page enables users to elect to receive e-mail notifications and indicate the type of position they'd like to be notified about.

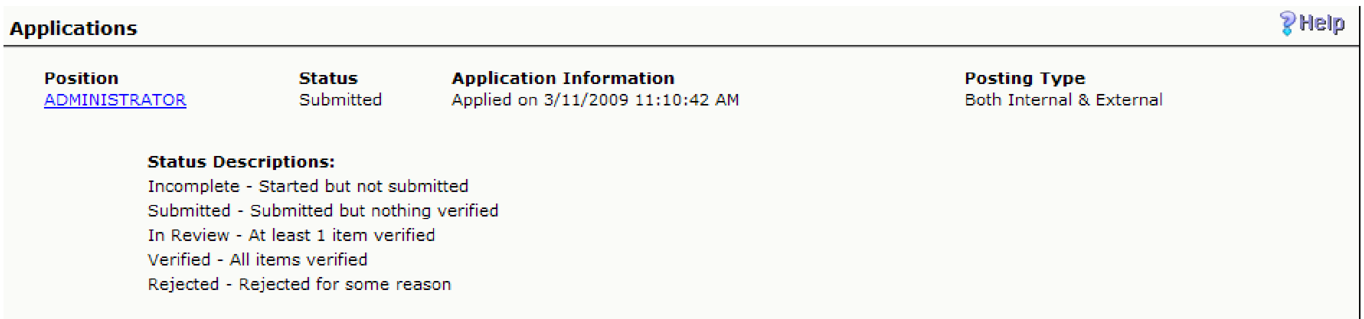

E-Mail Preferences	Help

RECEIVE EMAIL NOTIFICATIONS OF ALL NEW OPEN POSITIONS

Save

e. Applications

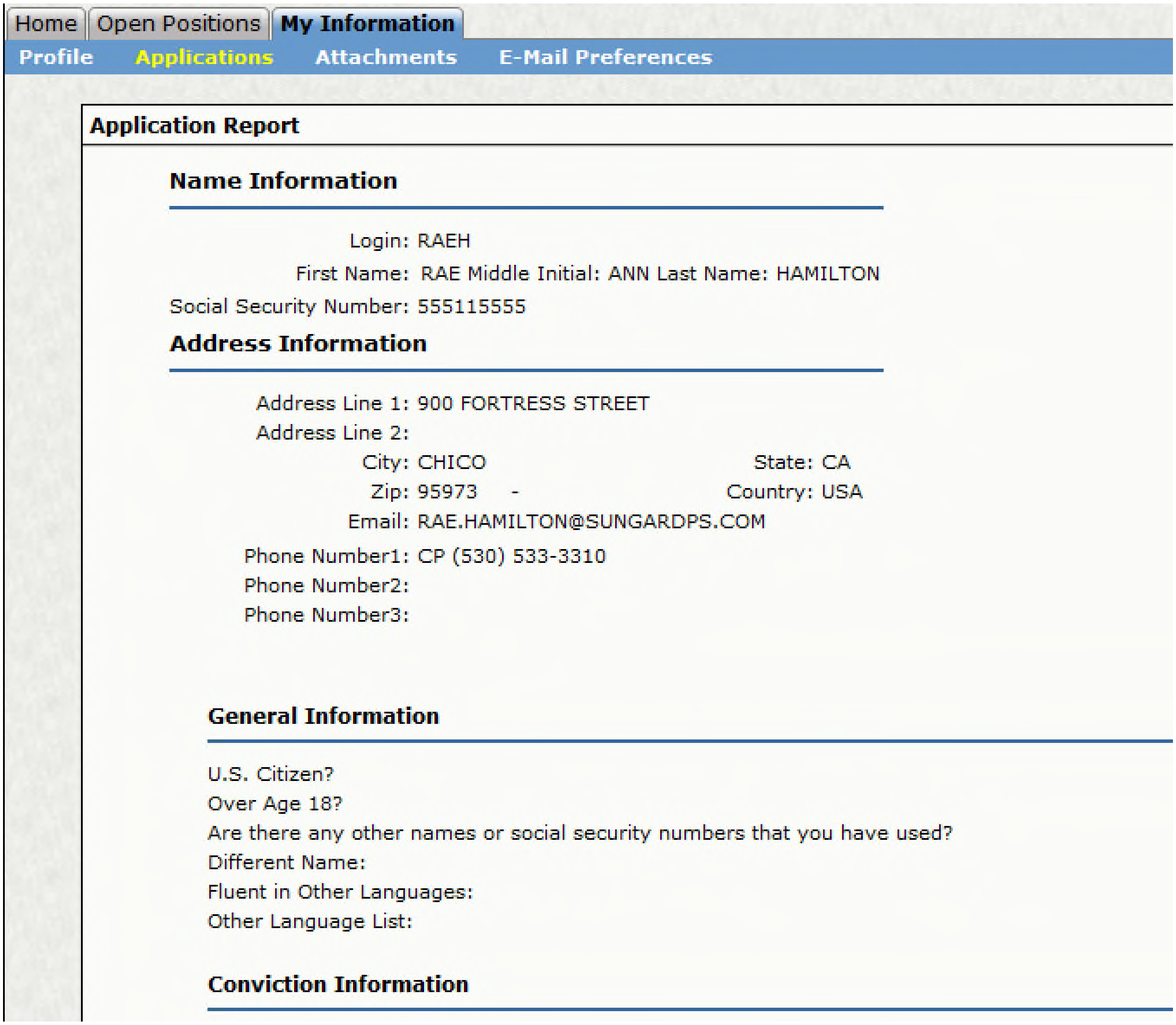
When completed, the applicant can log on and view their application report from the main Applicant Online page, by going to **My Information** tab, and then the **Applications** tab.


Applications	Help

Position	Status	Application Information	Posting Type
ADMINISTRATOR	Submitted	Applied on 3/11/2009 11:10:42 AM	Both Internal & External

Status Descriptions:
Incomplete - Started but not submitted
Submitted - Submitted but nothing verified
In Review - At least 1 item verified
Verified - All items verified
Rejected - Rejected for some reason

By clicking on the **Position link**, the applicant can see the responses to each of the questions within that application.

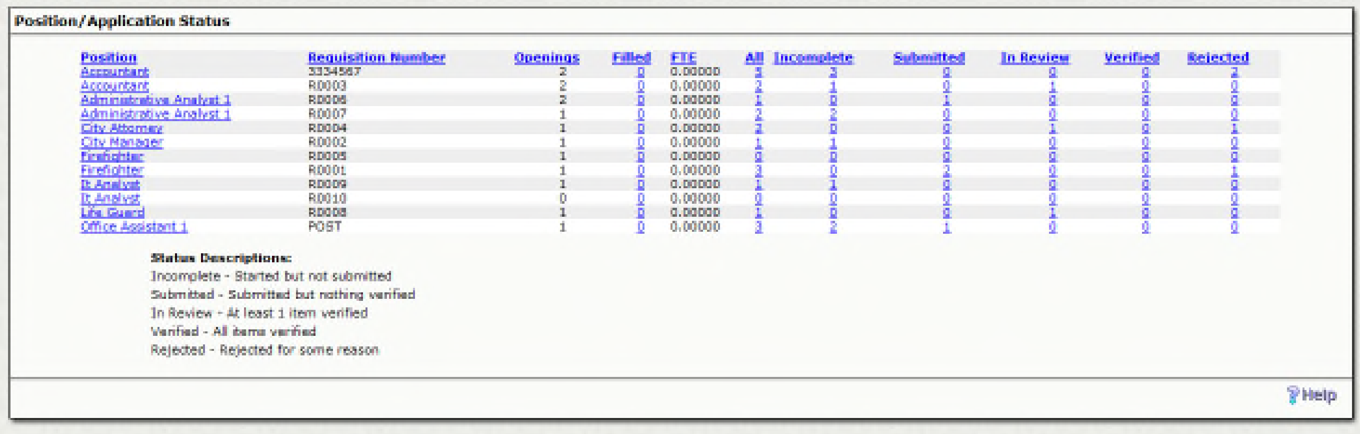


2. Administrative Internal Pages

The administrator's pages provide a paper feel to the applications and the ability for the administrator to see how many applicants have applied to each position, how many are complete and submit as well as verify the applicants information.

a. Position/ Application Status

The internal review pages begin with the Application Status page where you can examine the responses that have been received. Links are displayed in blue. In this example, clicking an item in the Position column will display the description associated with that position.



Position/Application Status

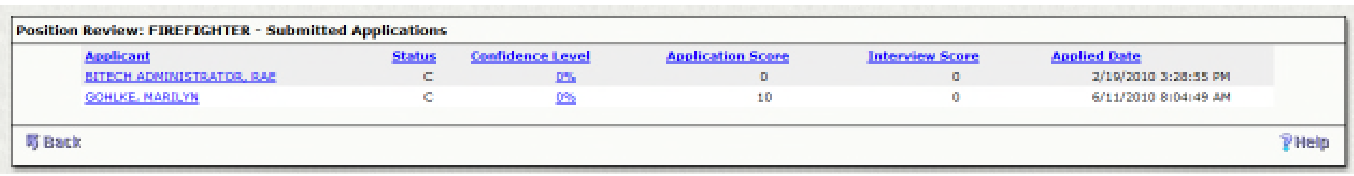
Position	Requisition Number	Openings	Filled	FTE	All	Incomplete	Submitted	In Review	Verified	Rejected
Accountant	3334567	2	0	0.00000	5	3	0	0	0	2
Accountant	R0003	2	0	0.00000	2	1	0	1	0	0
Administrative Analyst 1	R0006	2	0	0.00000	1	0	1	0	0	0
Administrative Analyst 1	R0007	1	0	0.00000	2	2	0	0	0	0
City Attorney	R0004	1	0	0.00000	2	0	0	1	0	1
City Manager	R0002	1	0	0.00000	1	1	0	0	0	0
Firefighter	R0005	1	0	0.00000	0	0	0	0	0	0
Firefighter	R0001	1	0	0.00000	3	0	2	0	0	1
It Analyst	R0009	1	0	0.00000	1	1	0	0	0	0
It Analyst	R0010	0	0	0.00000	0	0	0	0	0	0
Life Guard	R0008	1	0	0.00000	1	0	0	1	0	0
Office Assistant 1	POST	1	0	0.00000	3	2	1	0	0	0

Status Descriptions:
Incomplete - Started but not submitted
Submitted - Submitted but nothing verified
In Review - At least 1 item verified
Verified - All items verified
Rejected - Rejected for some reason

Help

b. Position Review

Clicking the All link will provide a list of the applicants for that position. In this case, three applications were received for this position, but they were all submitted by the same person. Rather than submitting three applications, the user may have simply used the "Complete Later" option and submitted only one application. Note only one application was completed. Note also that the confidence level for this user is "0%." As employees verify/confirm the information submitted in the application, the confidence percentage will go up.



Position Review: FIREFIGHTER - Submitted Applications

Applicant	Status	Confidence Level	Application Score	Interview Score	Applied Date
BITECH ADMINISTRATOR, RAE	C	0%	0	0	2/19/2010 3:28:55 PM
GOHLKE, MARILYN	C	0%	10	0	6/11/2010 8:04:49 AM

Back Help

Select the name of the applicant you would like to see. This will bring up a full application.

Application Report

Name Information

Login: MGOHLKE

First Name: MARILYN Middle Initial: Last Name: GOHLKE

Social Security Number:

Address Information

Address Line 1:

Address Line 2:

City: State:

Zip: - Country: USA

Email:

Phone Number1:

Phone Number2:

Phone Number3:

General Information

U.S. Citizen? True

Over Age 18? True

Are there any other names or social security numbers that you have used? False

Different Name:

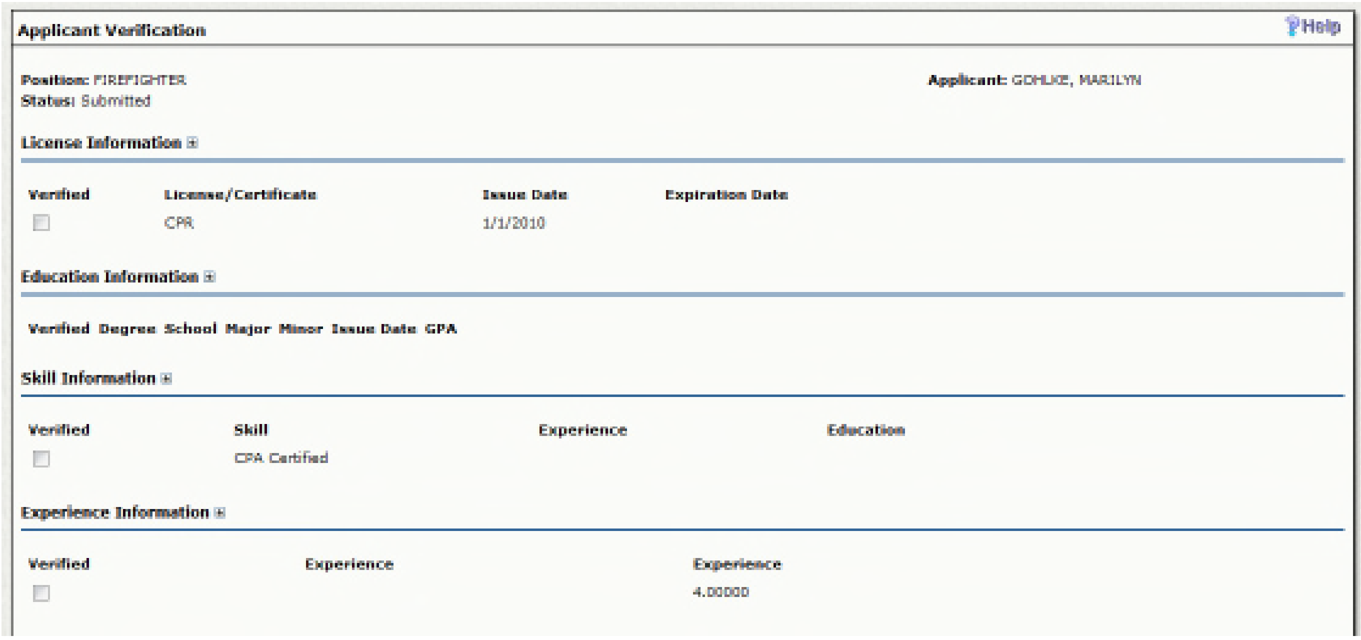
Fluent in Other Languages: False

Other Language List:

Conviction Information

c. Confidence Level

Evaluate the applicants by verifying their data. Enter this area by clicking on the Confidence Level % under each applicant. Just check items as it is confirmed the applicant included accurate and current information in their application. Be sure to save when done.



3. Applicant Tracking

Applicant Tracking screens help process applicant data and assist in monitoring each step of the application process from the creation of the job to hiring the applicant. Applicant Tracking is within the Human Resource module and can be access through Human Resource + Applicant Tracking + one of five screens (HRAPxx).

a. HRAPRD – Requisition Definition

The requisition/posting screen serves a dual purpose of defining eligibility lists and opening postings/requisitions. The posting or eligibility list number is the ID by which several other applicant screens track data. The two primary functions of this screen are: 1) to define basic information associated with the eligibility list or posting (i.e., position, salary, location, etc.), and 2) to establish minimum requirements for the posting (i.e., hurdles, degrees, licenses, etc.). Enter the eligibility list on this screen, and requisitions are then created automatically using the eligibility list information (i.e., hurdles, degree requirements, etc.) as defaults. The Notes tab is used to record miscellaneous notes relating to a requisition/posting.

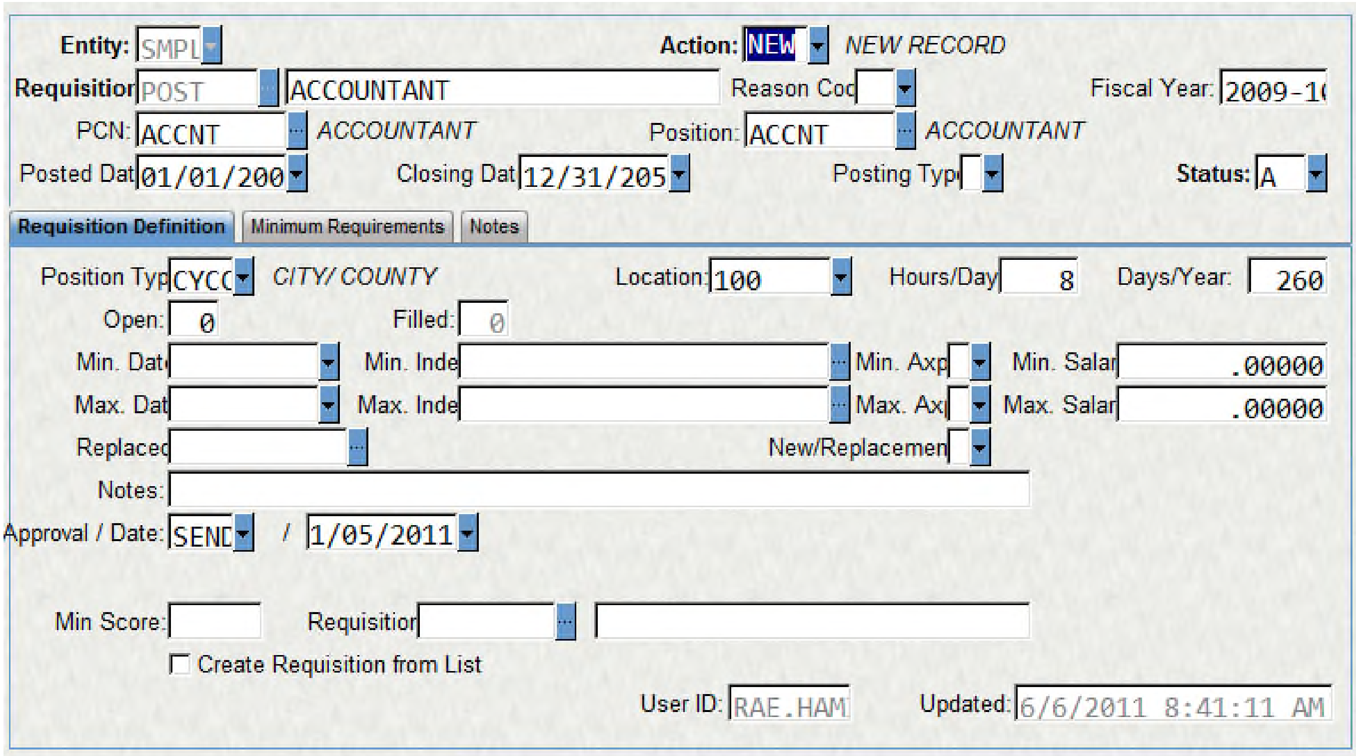
Entity needs to be set to your organizations entity. **Action** will be NEW since you are creating a new posting. The **Requisition** is a posting number that can either be manually entered or a common code can be set up to auto seed the posting number. This number is used to tie the applicants to the position. If the PCN description is not what would like to be seen as the Position on AO, we are able to request that the Requisition Description is used as the Position. This allows us to give a better description than what might be used in the PCN table. The **Fiscal Year** can be set to which year this position applies to. The **PCN** and **Position** need to be entered for the position. Both text fields are lookups. If your PCN and Positions are 1 PCN to 1 Position, the Position will automatically fill in once the PCN is selected. If there are many Positions for one PCN, the Position will need to be selected as well. **Posted Date** is required for the system to know when to allow applicants to apply to the position. The position will not be posted to Applicant Online until the current day is or after the **Post Date.** The **Closing Date** will tell the system when to remove the posting from Applicant Online. The posting will not be viewable after the **Closing**

Date any date that is entered as 12/31/2050, will show as *Until Filled* on Applicant Online**.** The **Posting Type** needs to be set to Internal if the position is only an internal posting, external or both. **Status** needs to be set to A 'Active' in order to allow applicants to apply. It can be set to I 'Inactive' if the posting is not on AO.

Requisition Definition tab

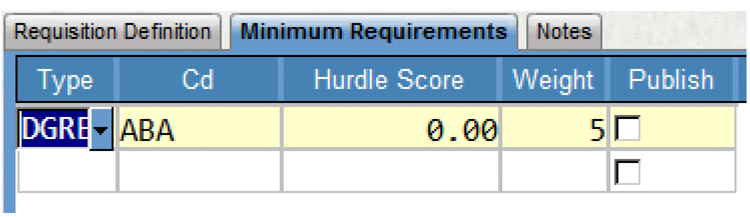
The Requisition Definition tab is the area in which you create the job posting description that will be viewable as the Position and Summary on Applicant Online.

Position Type is required and has to match the **Position Type** on the PCN/ Position Definition. This field will generally default to what was defined in HRTBPC. This field is commonly used for the application workflow. The type will tell the system which pages to put the applicant on depending on the **Position Type. Location** is not required but is used for security. If you would like the positions to be specific to certain locations and have Applicant Online Administrators only view applications that are specifically for their location, this field needs to be field out. Hours/ Day and Days/ Year are for reference purposes as well as Open. Open refers to how many openings there are for this position. This information does appear on the Applicant Online Administrator's Internal Review Page. Filed is auto generated when an applicant is hired for this posting. The salary information will show on the public pages if this is filled out. **Min and Max Date** need to be set so that the correct salary index for that time range is being selected. **Min and Max Index** are lookups from the same salary index that is used on the Pay Assignment screen. This will show the applicant the salary range that this position applies for. **Min and Max Axp** will default from the selected salary schedule. **Min and Max Salary** will be auto filled with the amount associated with the step of the salary index. Both lines, Min and Max, for the salary information must be filled out in order to use any of the salary information. **Approval/ Date** needs to be SEND as the final approval process before this requisition definition will appear on Applicant Online. The date will default to today's date.



Minimum Requirements tab

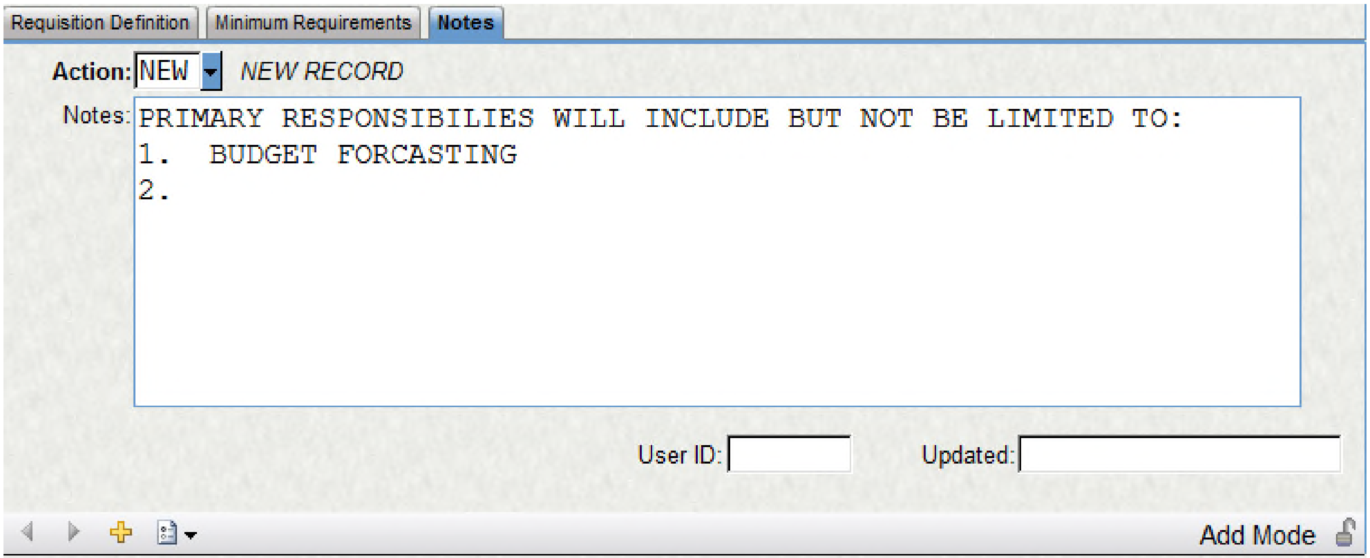
This tab is used to establish minimum requirements for the position with hurdle scoring. Using this tab helps hire the highest qualified applicant.



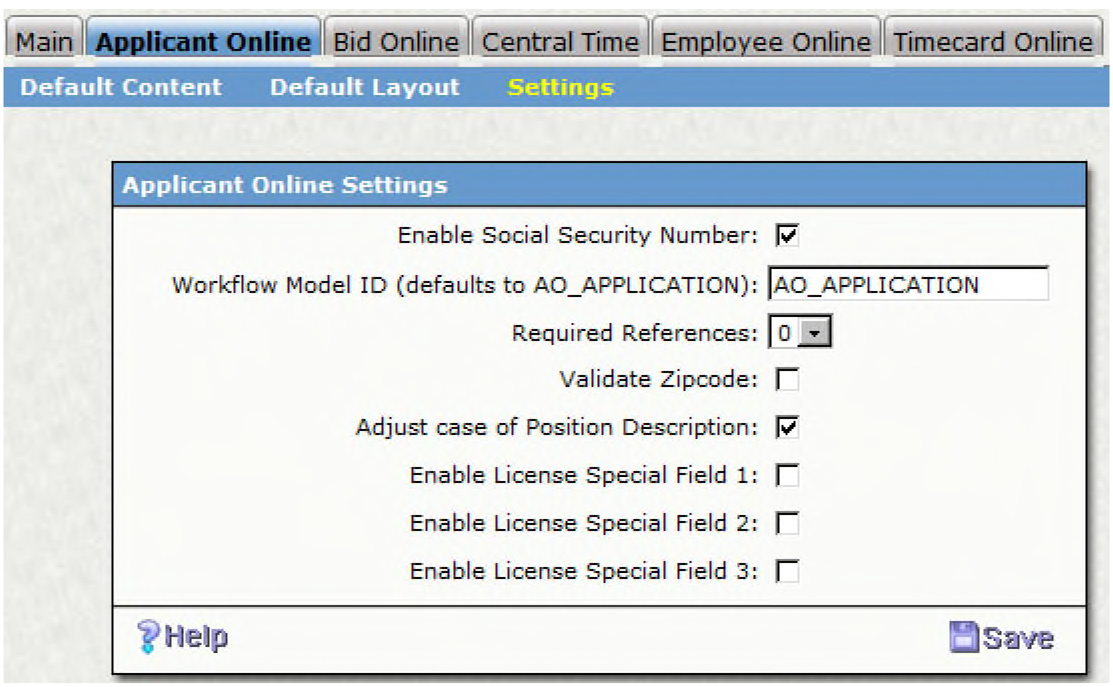
Type is referencing the type of code that will be chosen. The Codes are limited to those connected to the type. **Hurdle Score** is the percent that the applicant needs to meet the code. **Weight** is referring to the importance of the code. **Publish** is asking whether or not you would like to show this as a requirement on the job description.   Not all items that are being used for the scoring have to be published. The applicant won't see those that aren't mark as a requirement but could be given credit for having a license on their application score.

Notes Tab

The notes tab is used for reference purposes only. This is a good area to put a reason for the job posting. There may be multiple notes for one posting. To add another note, select the '+' symbol in the lower left corner. However, in an **Action** code of **AONT** is added, the notes will print after the Job Summary with the label of "Requisition Specific Notes." This allows for each position to be further defined if needed beyond the PCN Table description. For the Job Summary or the Requisition Specific Notes to print in sentence case, you will need to check the *Adjust case of Position Description* on the Applicant Online Dashboard.



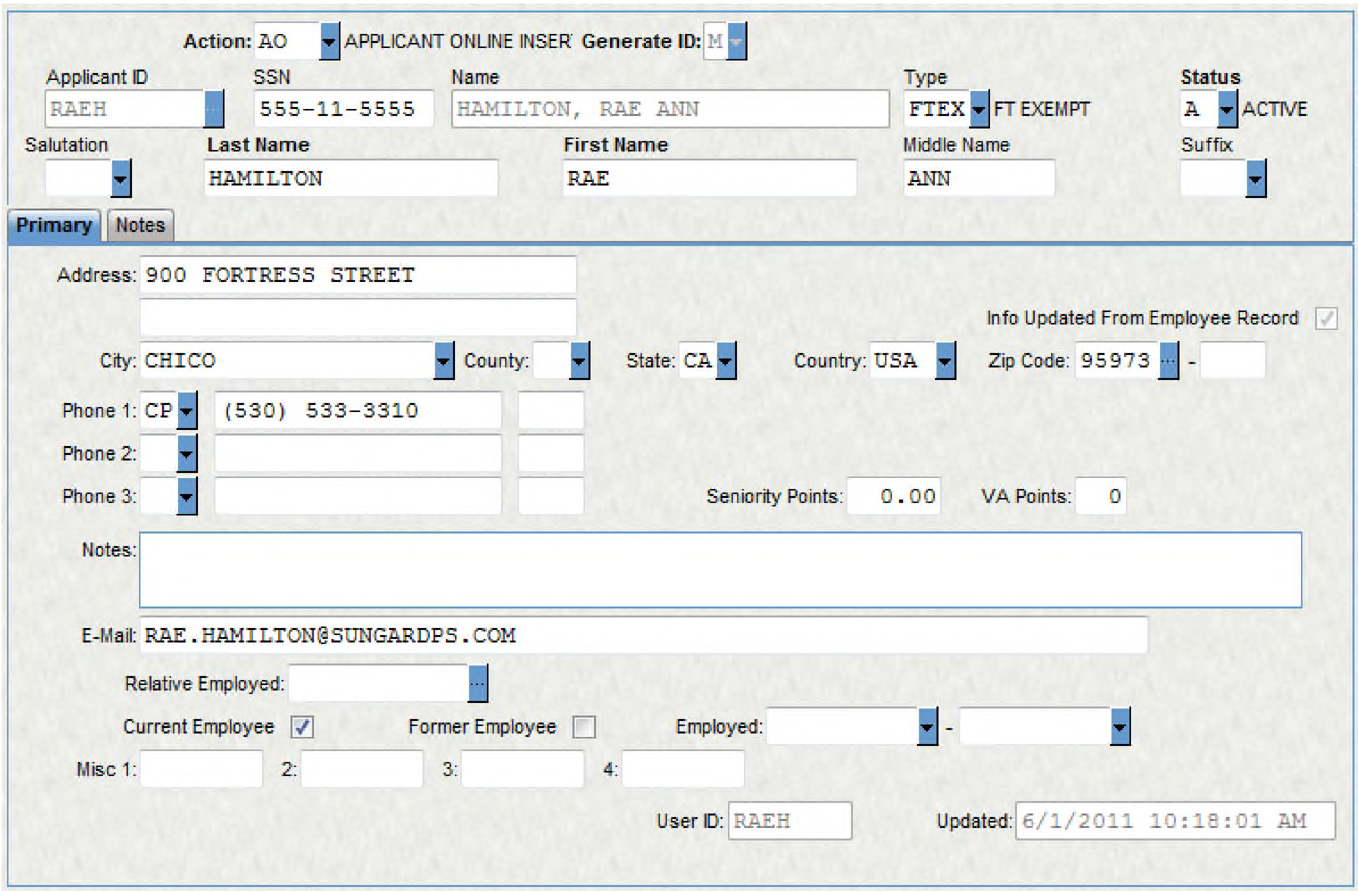
For the Job Summary or the Requisition Specific Notes to print in sentence case, you will need to check the *Adjust case of Position Description* on the Applicant Online Dashboard.



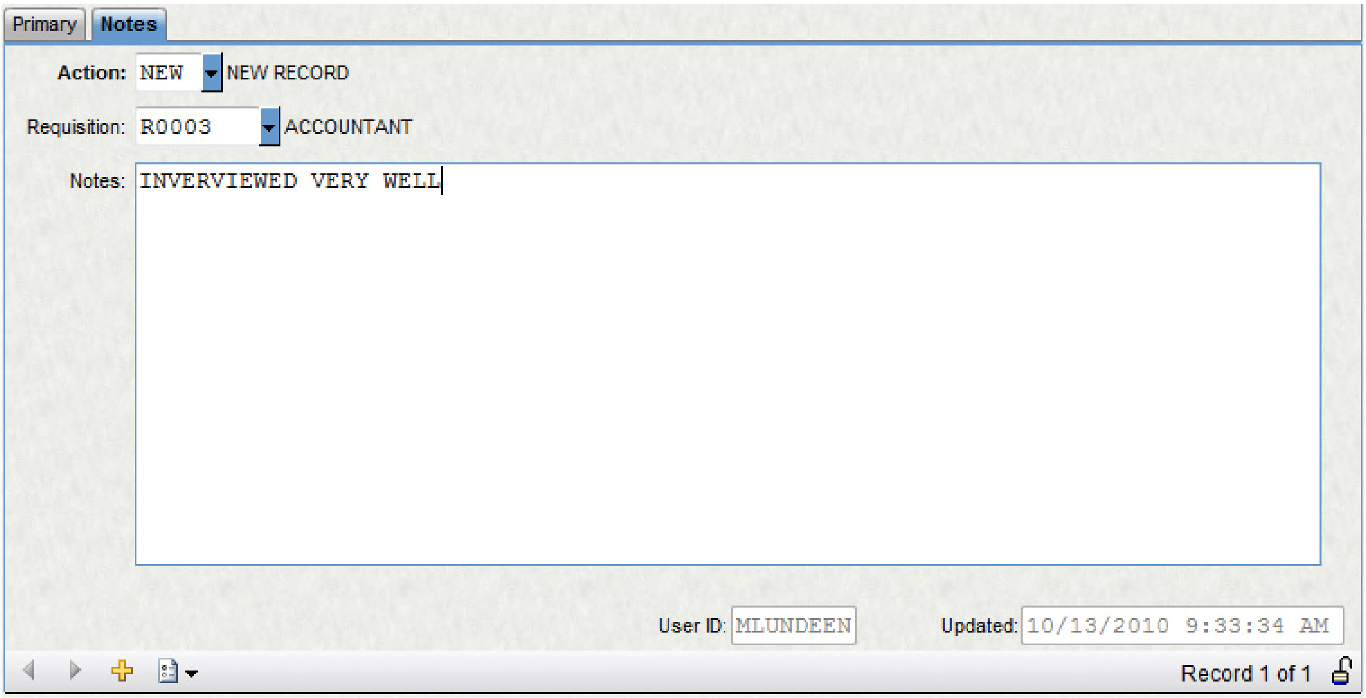
b. HRAPAM - Applicant Master

The Applicant Master stores the applicant's primary information that is asked on the application. Since an applicant can apply for multiple positions, this screen will only be created once, per login. If a user forgets their login and creates another one, they will have two records in the Applicant

Master. If an applicant changes addresses, phone number or e-mail on their main information page when logging into to Applicant Online, this screen will also be updated.



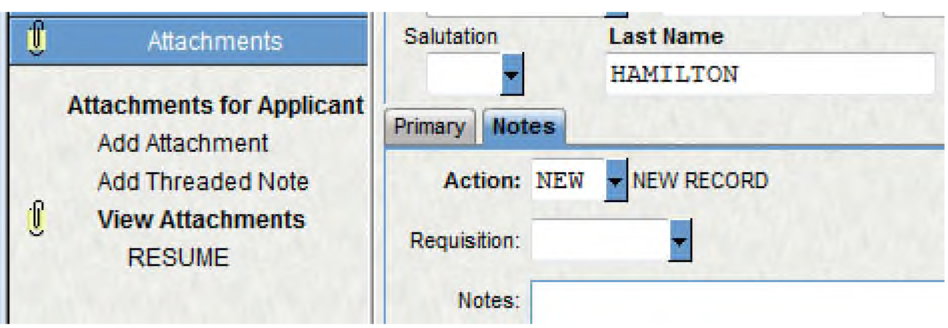
The Notes tab is for reference reasons only. If the applicant has applied to multiple requisitions, each posting number will be listed in a drop down next to **Requisition.** This allows a separate note to be created per position. To add another note, select '+' in the lower left corner.



Attachments

When an applicant attaches an attachment on their main information page, not in the actual application, it is also accessible from the Applicant Master.

Select the attachment name to view.



c. HRAPAD – Applicant Information

The Applicant Information screen captures the majority of the answers to the questions that were asked on the application. The tabs duplicate tabs in the Human Resource module. When an applicant is hired, the information captured here will be transferred to the proper Human Resource screen. The items that are defined in the drop downs are being driven from the same background tables as the equal Human Resource screen is using.

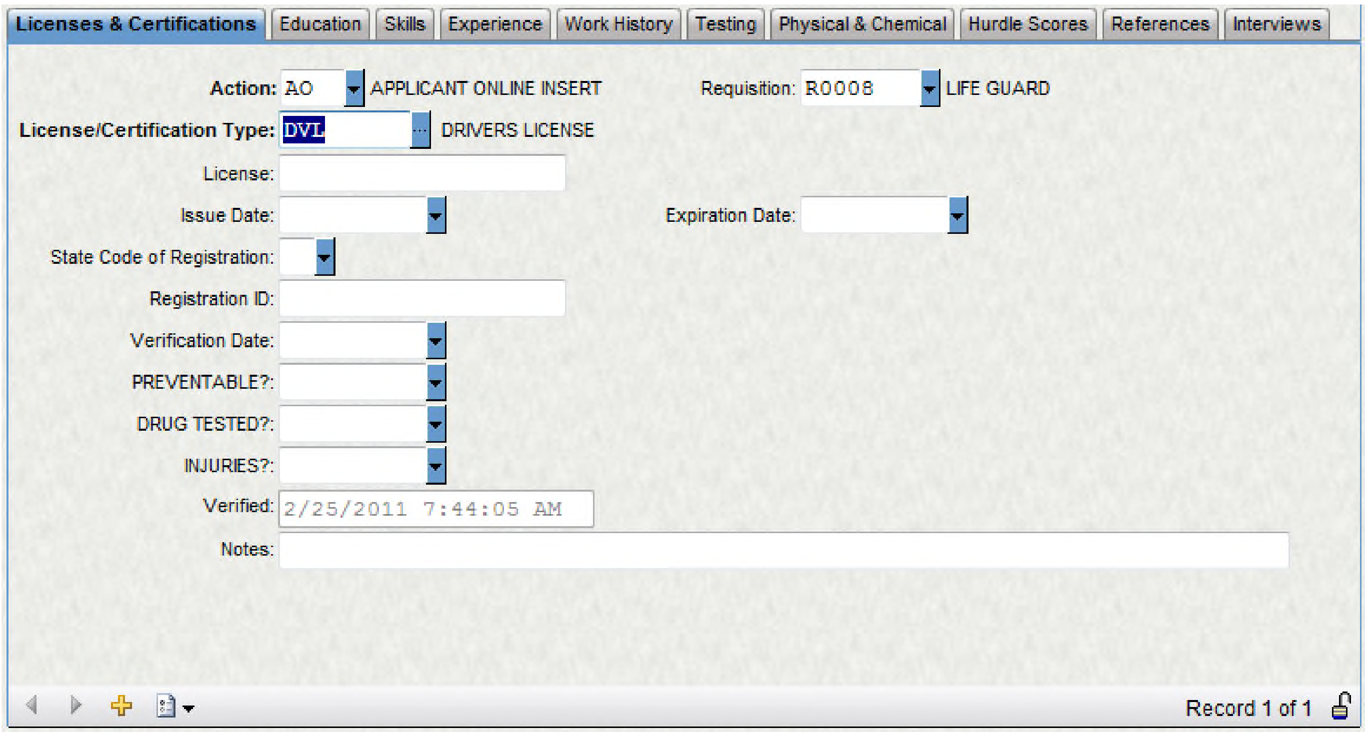
This screen is mostly used for reference and reviewing an applicant's information.

An applicant could have multiple records per tab. In the lower right corner will show the record number of however many records are being stored here. To navigate to the next record, select the arrow that is darkened in the lower left corner.

Since some questions may be asked on multiple applications, others might be specific to a job. A **Requisition** will be on each record to verify that the information is coming from the right application.

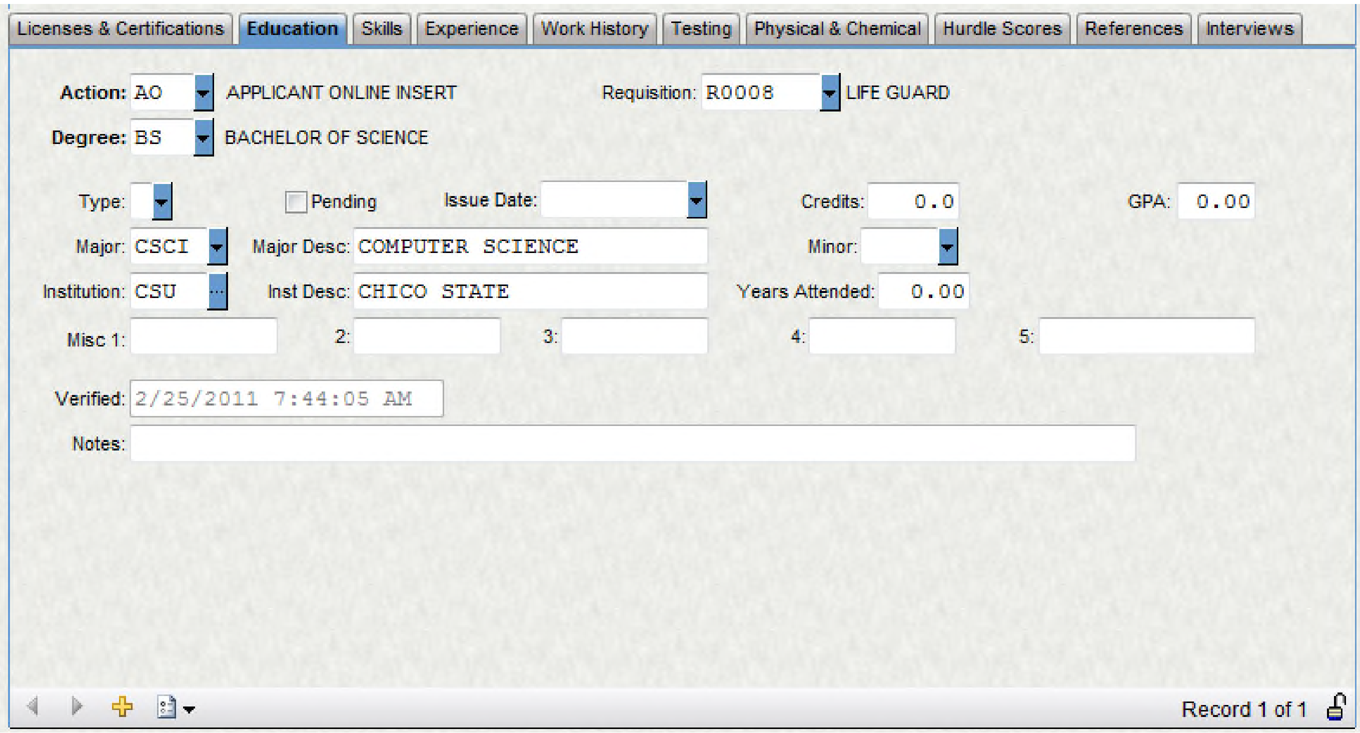
License & Certification

Feeds to HREMET – Human Resources + Employee Information + Education and Skills



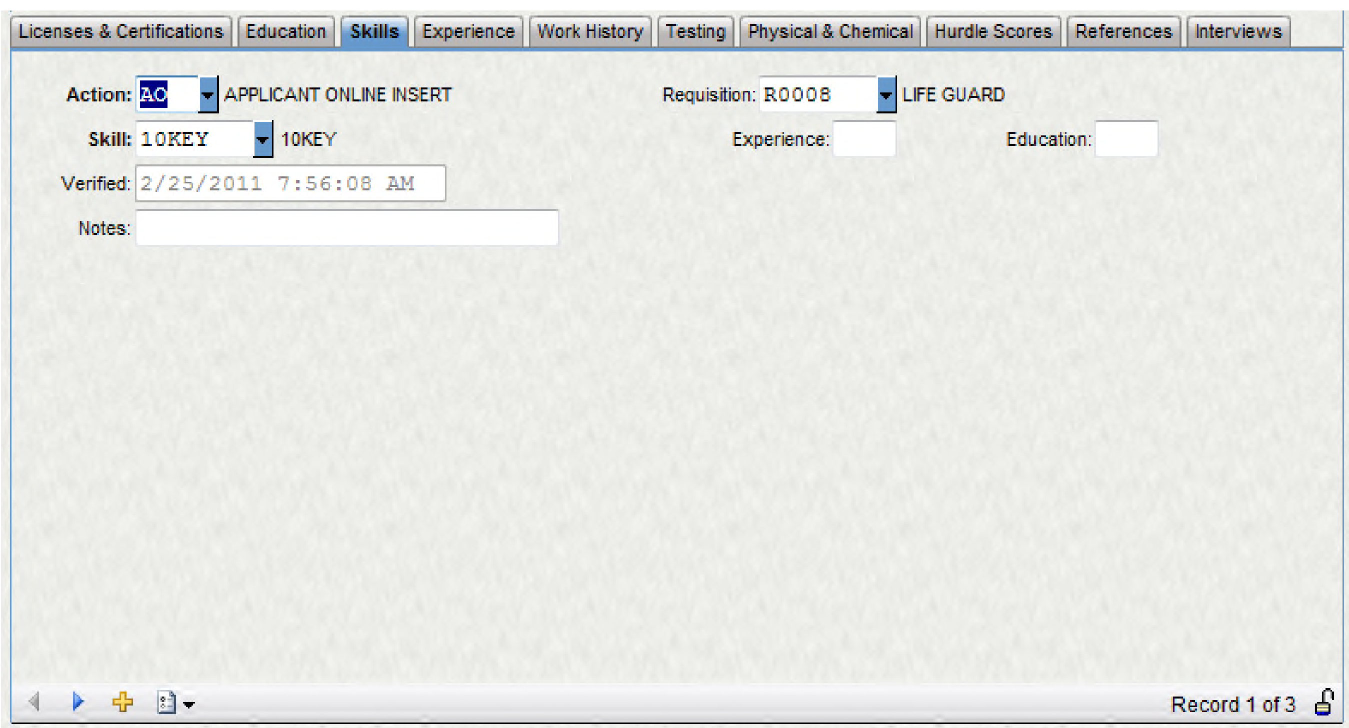
Education

Feeds to HREMES – Human Resources + Employee Information + Education and Skills



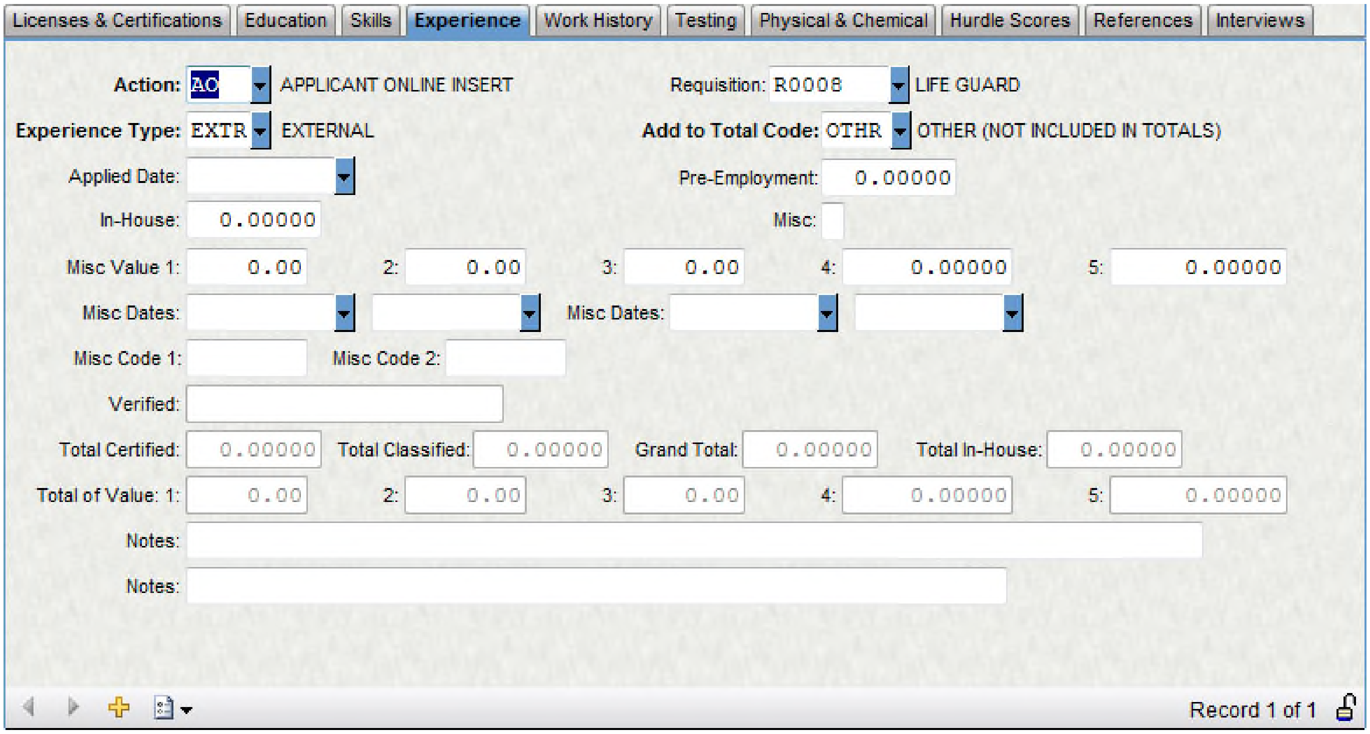
Skills

Feeds to HREMES – Human Resources + Employee Information + Education and Skills



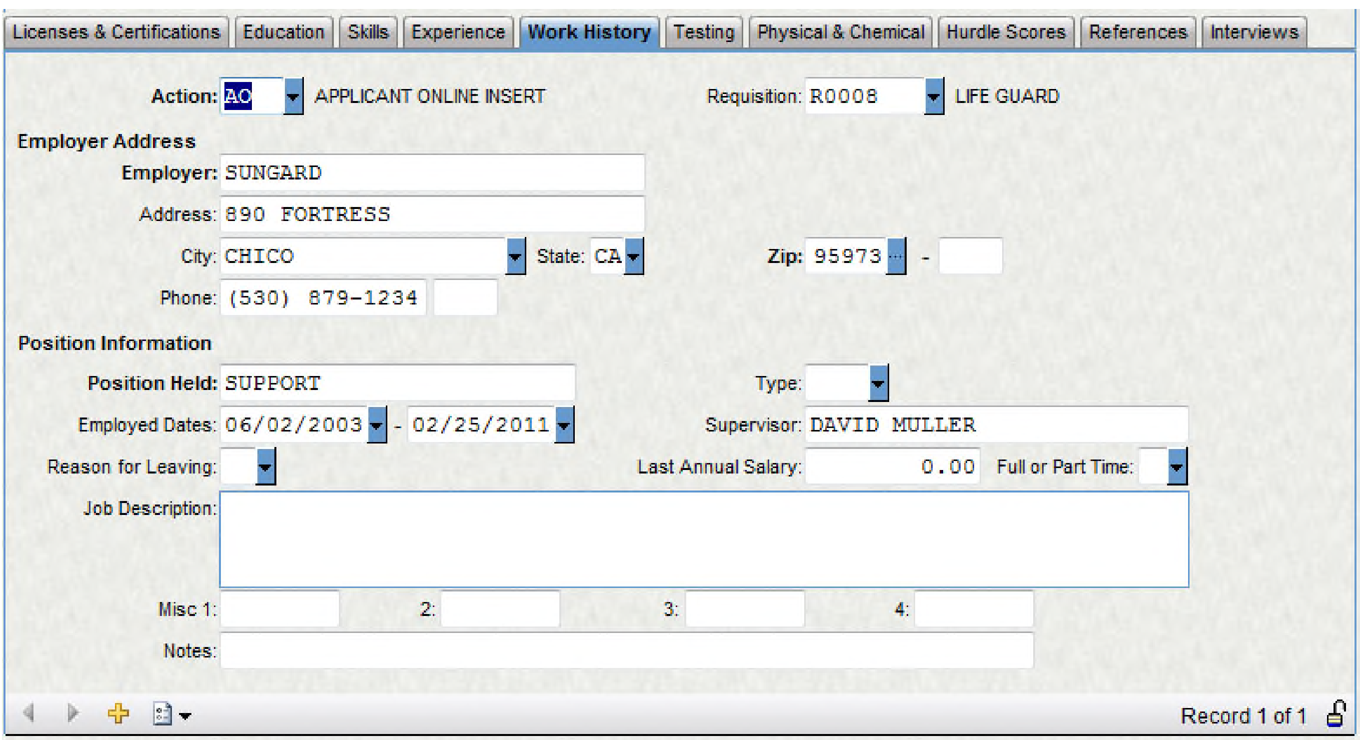
Experience

Feeds to HREMES – Human Resources + Employee Information + Education and Skills



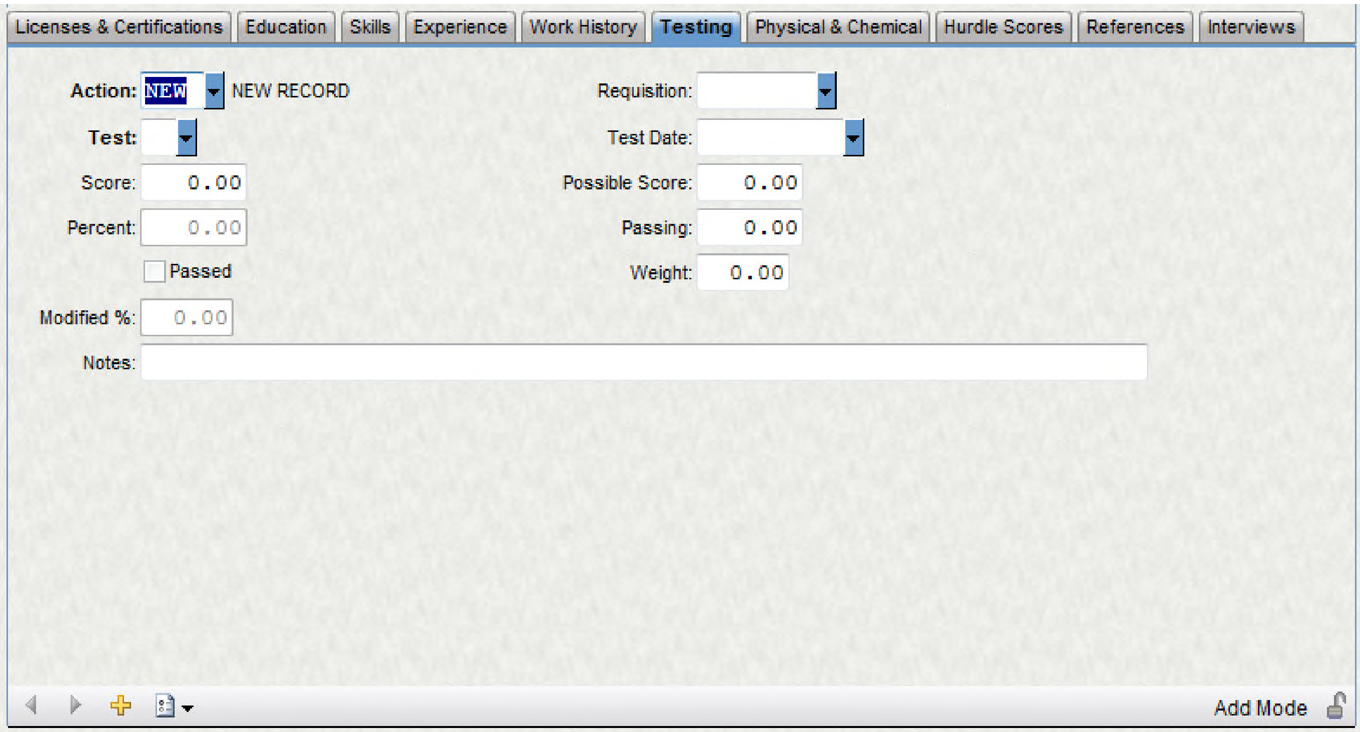
Work History

Feeds to HREMES – Human Resources + Employee Information + Education and Skills



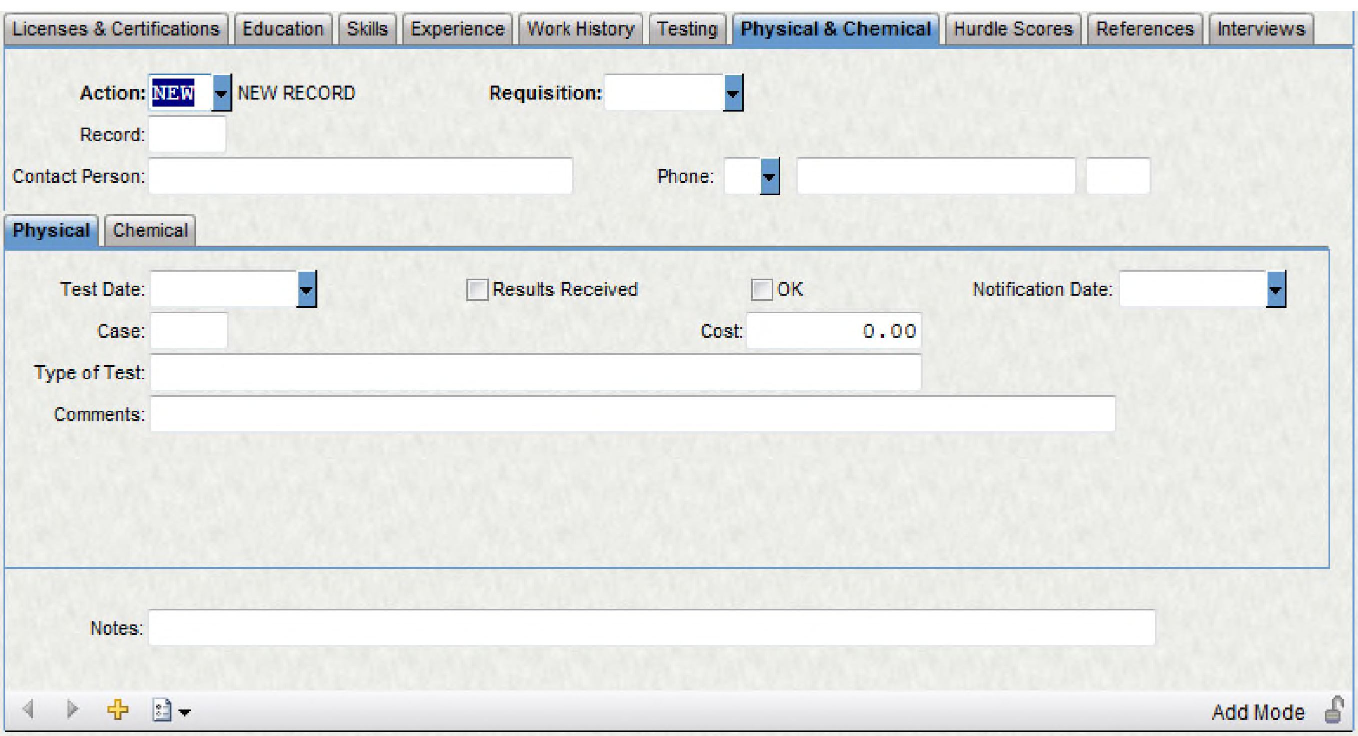
Testing

Feeds to HREMET – Human Resources + Employee Information + Employee Tracking

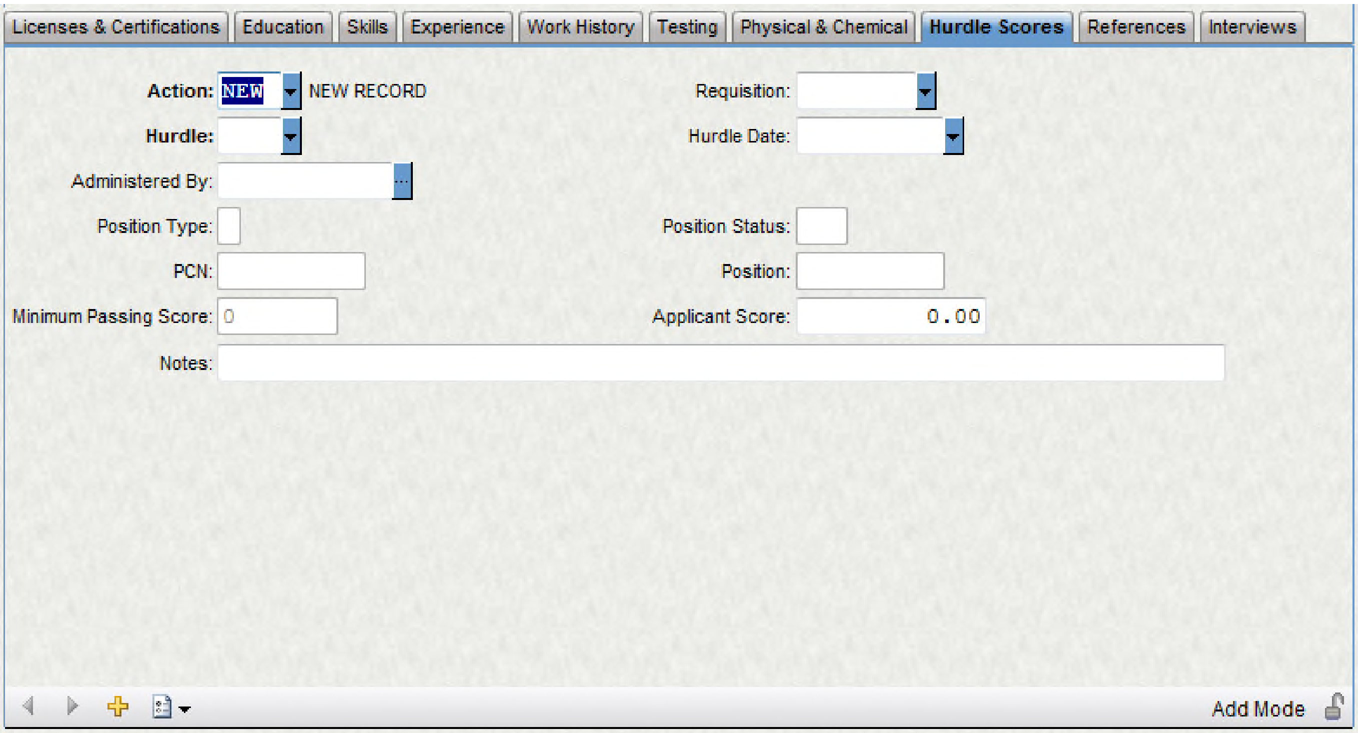


Physical & Chemical

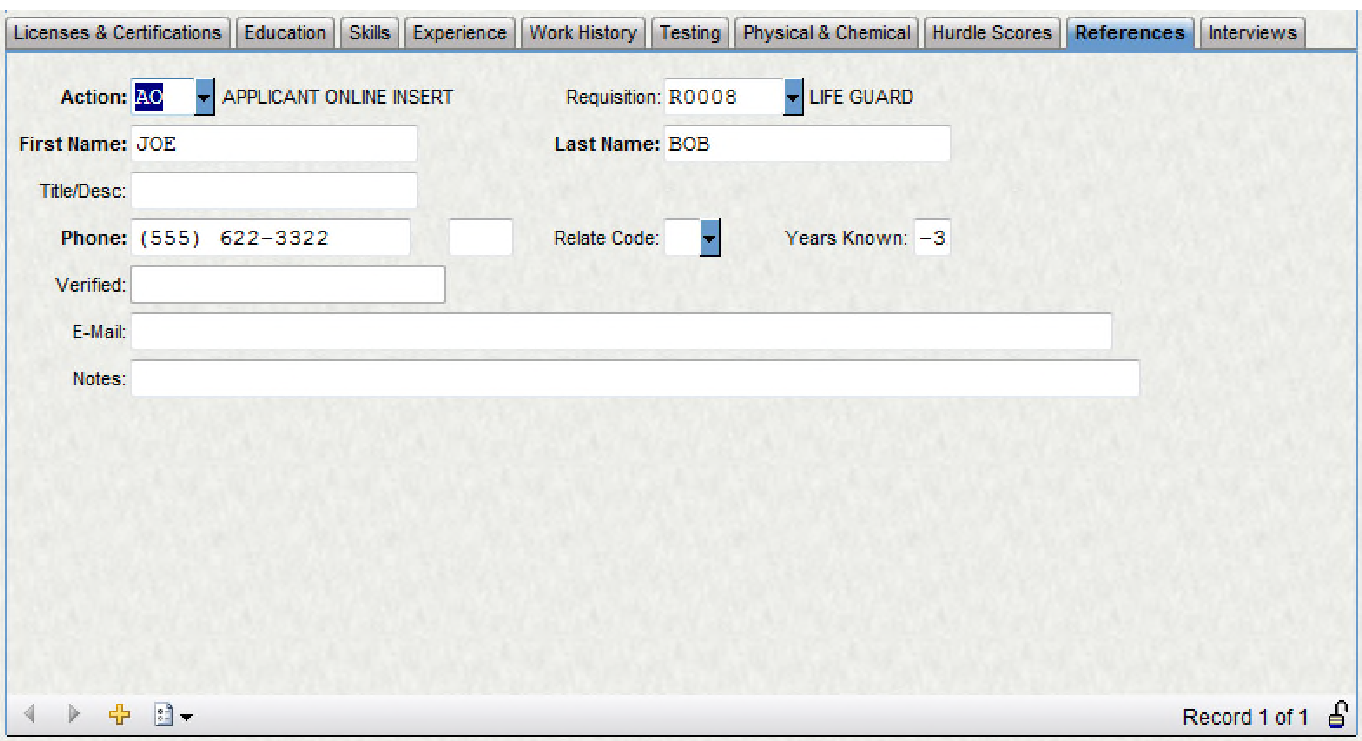
Feeds to HREMET – Human Resources + Employee Information + Employee Tracking



Hurdle Score

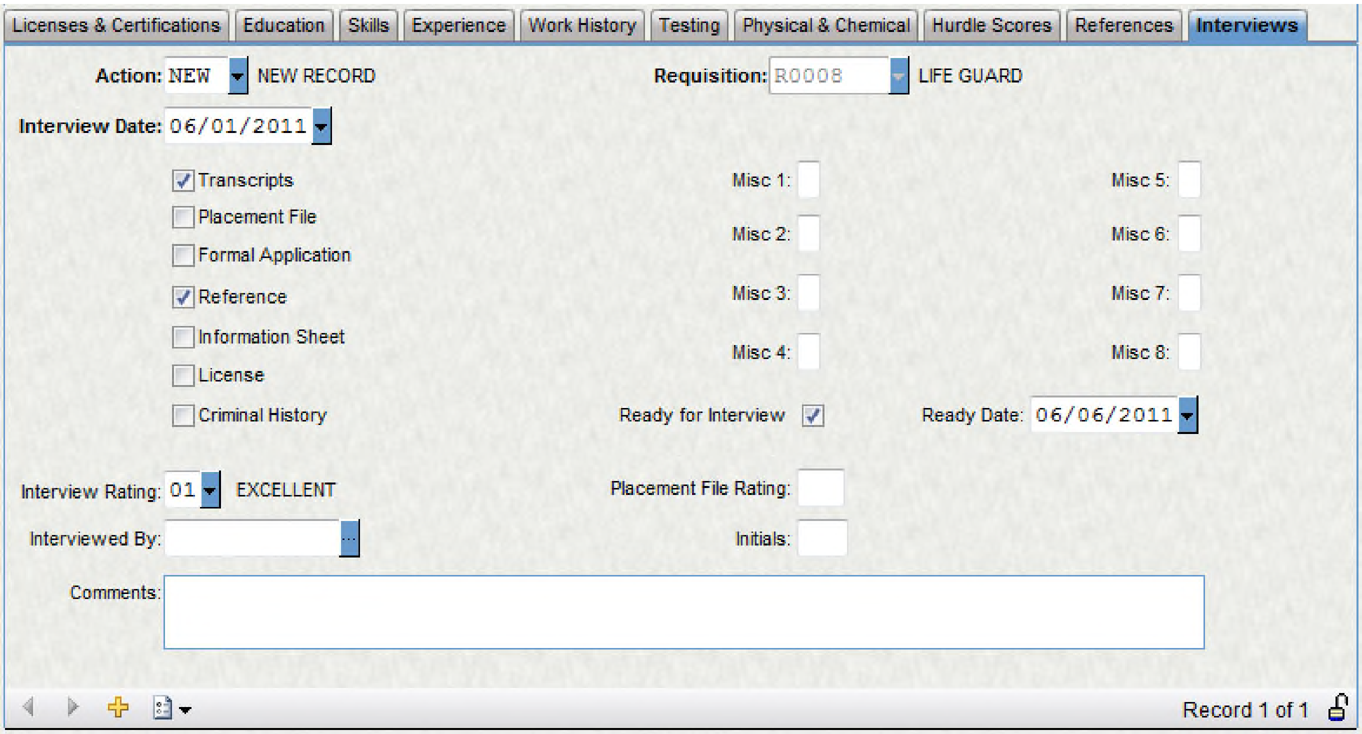


References



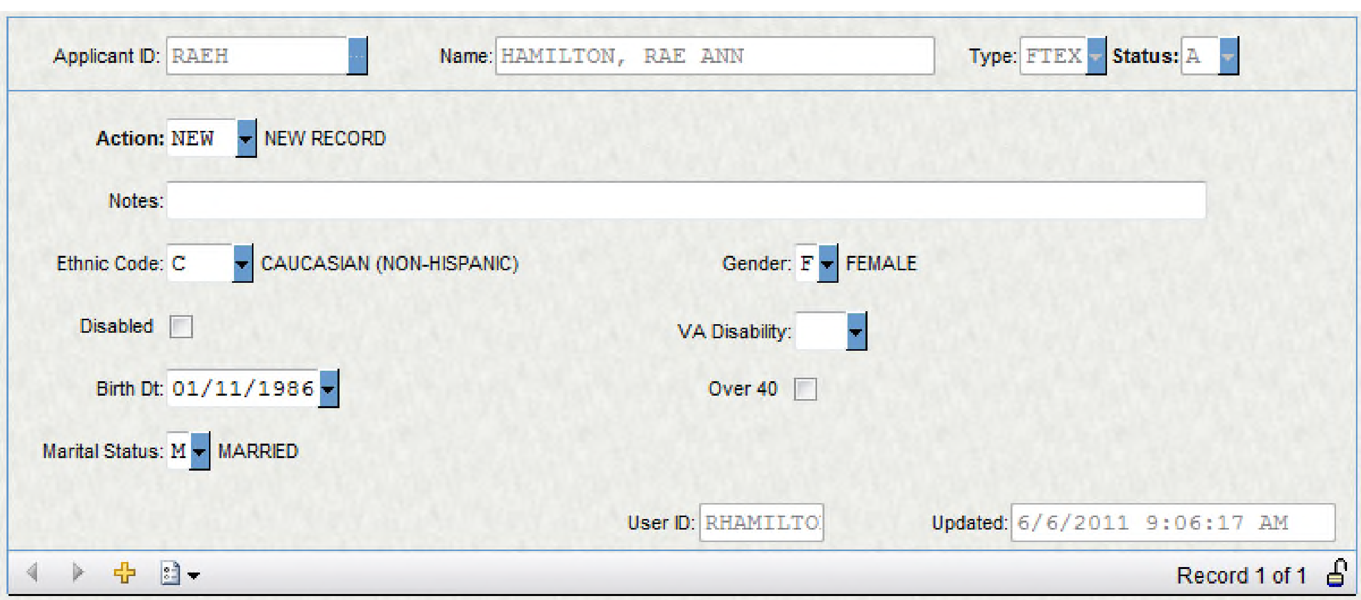
Interviews

This tab allows you to keep track of the items that have been received and where the applicant is in the interviewing processes. It is reference only and does not feed anywhere.



d. HRAPEO – Applicant Demographic & EEO

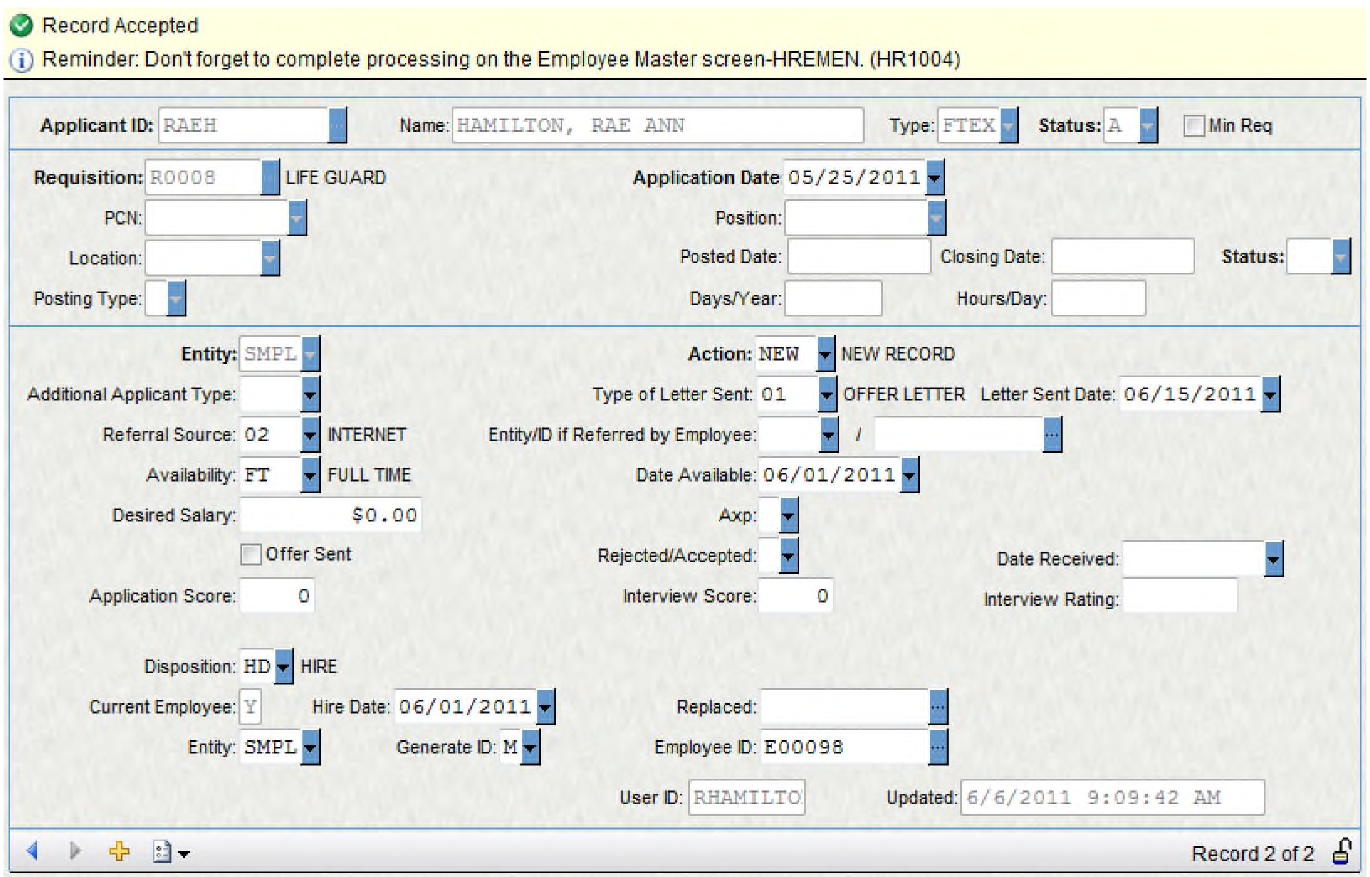
If this information is captured in the application process, it will be stored here. This information will not be on the actual application that is viewable to the Applicant Administrators. If the applicant is hired, this information will feed to the HR Employee Master.



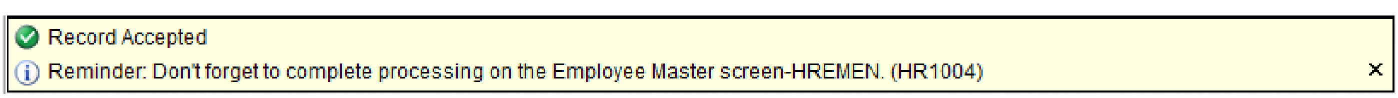
e. HRAPPS – Posting Information

The Posting Information screen is used to track where an applicant is in the hiring process, such as offer letter sent, was it rejected or accepted.

The **Disposition** tells the system whether or not to transfer the applicant to the HR Employee Master or to reject them. If it is set to HIRE, the two lines below it must also be filled out. The **Hire Date** will be copied over to HREMEN, if the applicant is replacing an employee in your system, you may select the employee in the **Replaced** field. The **Entity** must be set to your organization's entity, the **Generate ID** needs to be set to M if you manually enter the **Employee ID** or to A if they are auto generated. After the information is inserted, hit **Enter.**



The following warning will appear if all of the information is accepted.



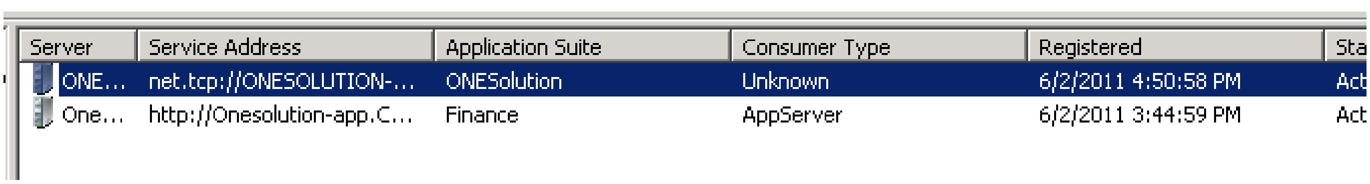
The HR Employee Master record will be created with an **Action** code of SCRN and a **Approval** code of Wait. This will tell us that this employee was hired through Applicant Tracking and the rest of the information must be entered before they enter payroll. The **Requisition** number for the position that they were hired for will also be shown on their employee master record.

4. Required Setup

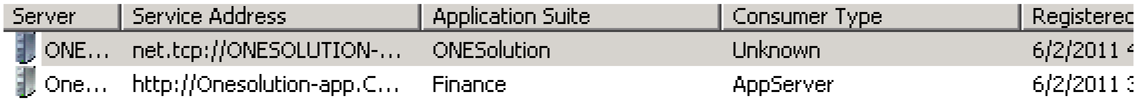
1. Security Setup

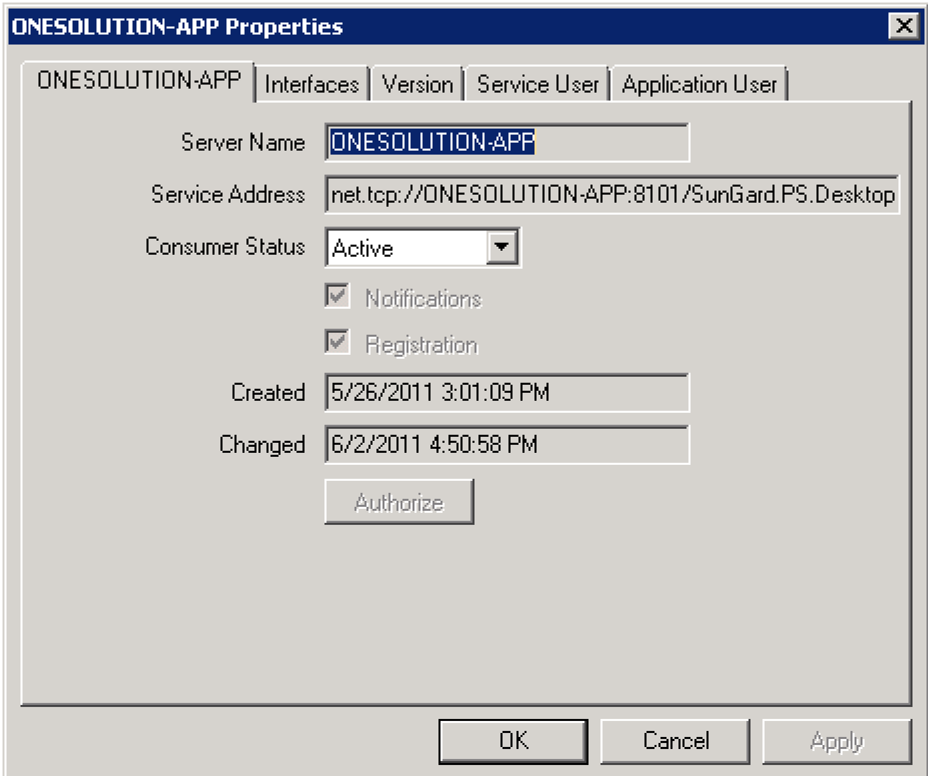
- From SPSOne, select Servers
- Select Security Consumers
- Select the correct account

- You will now see the connections in the right window

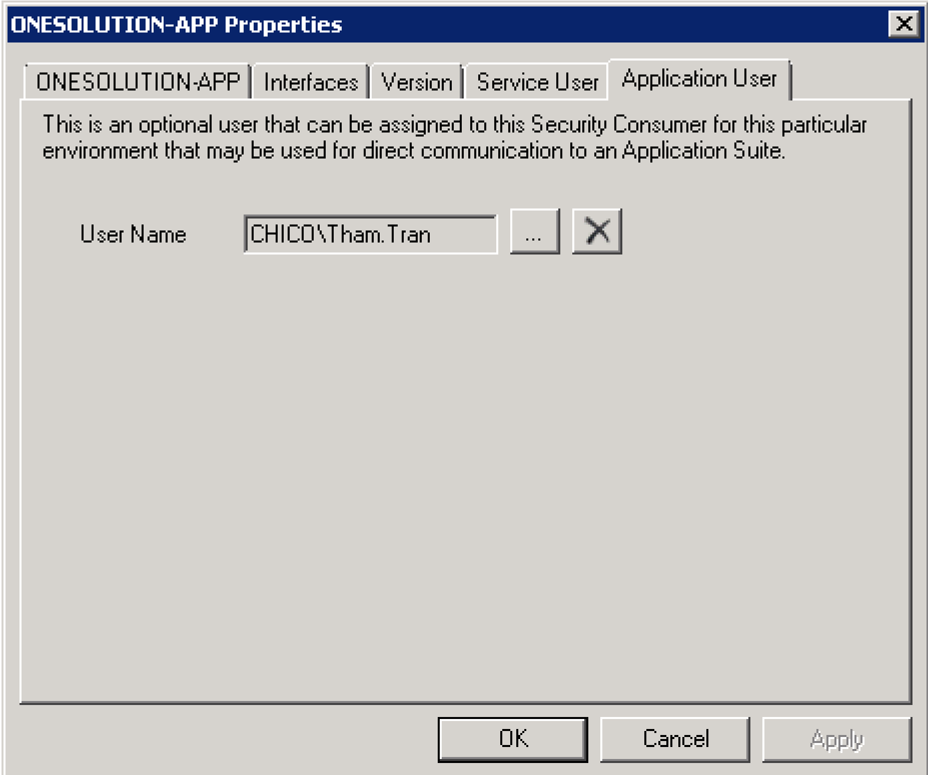


- Right click the top one first and select Properties



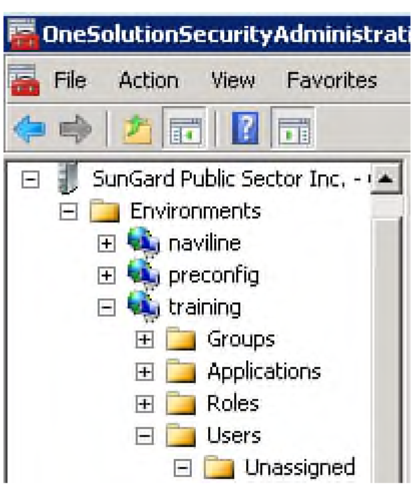


- Select the Application User Tab



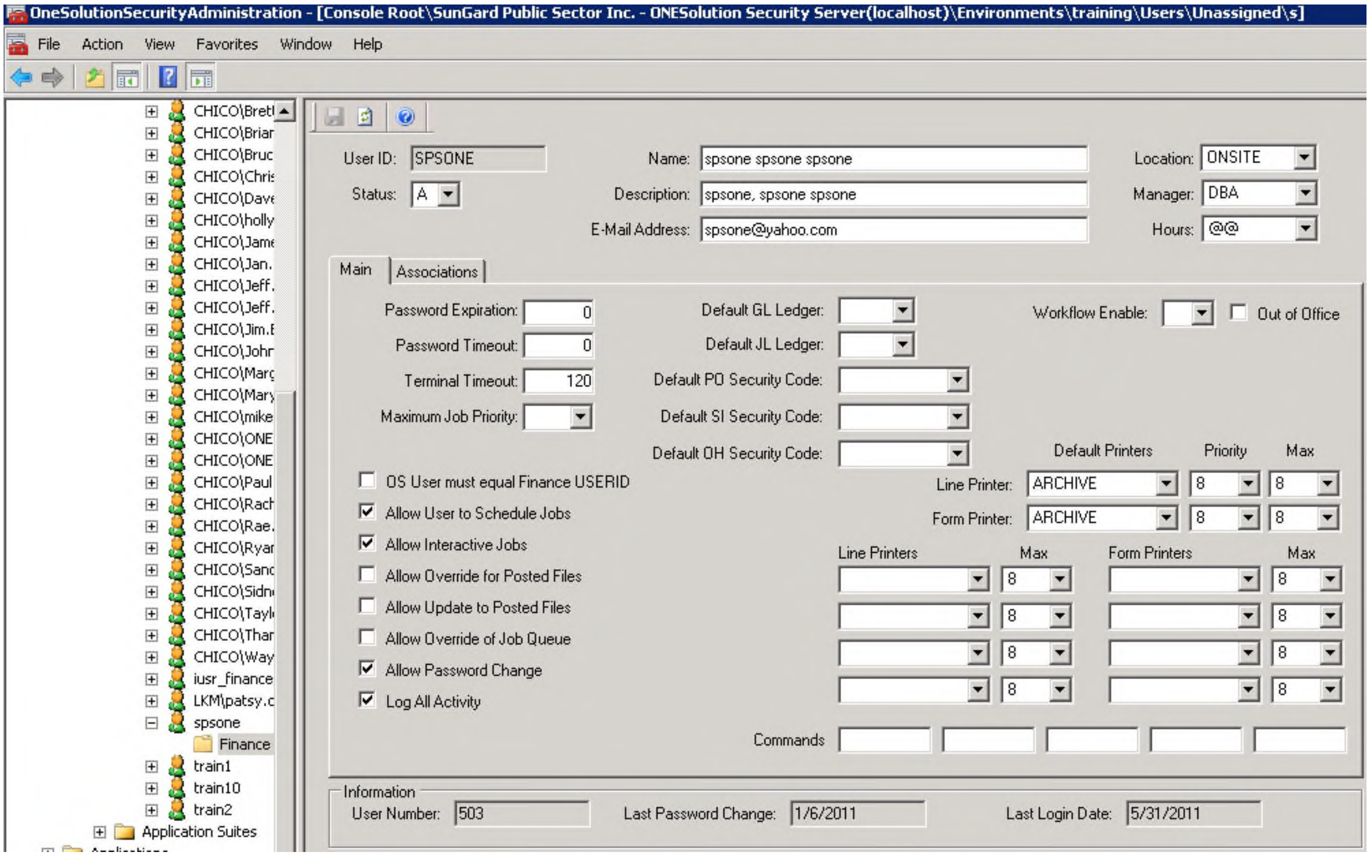
- Select the correct user and select OK
- Repeat on the second connection.

- Now select your portal user in the list of users.
  - Select the correct Environment
  - Select the folder for Users
  - Select the next folder that your portal user resides in, in this example, we are selecting Unassigned

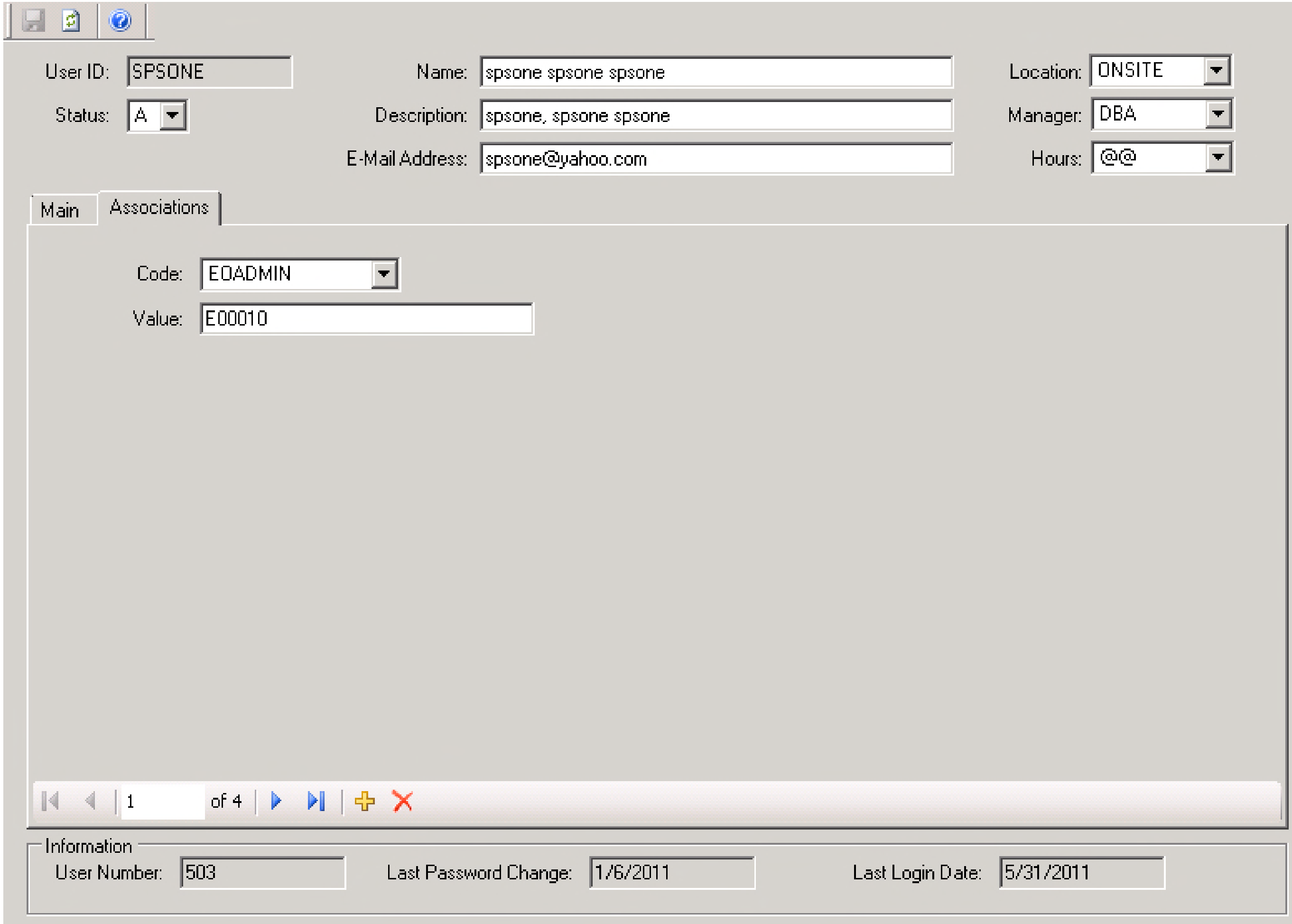


  - Select the Portal User (SPSONE)
  - Select the + next to the user so you will see a Finance User Settings folder

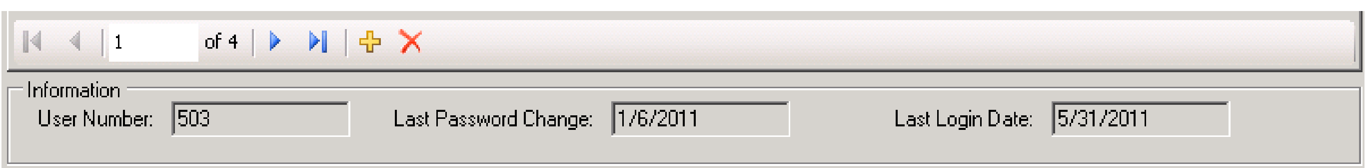
- o By selecting this folder, the user definition will appear

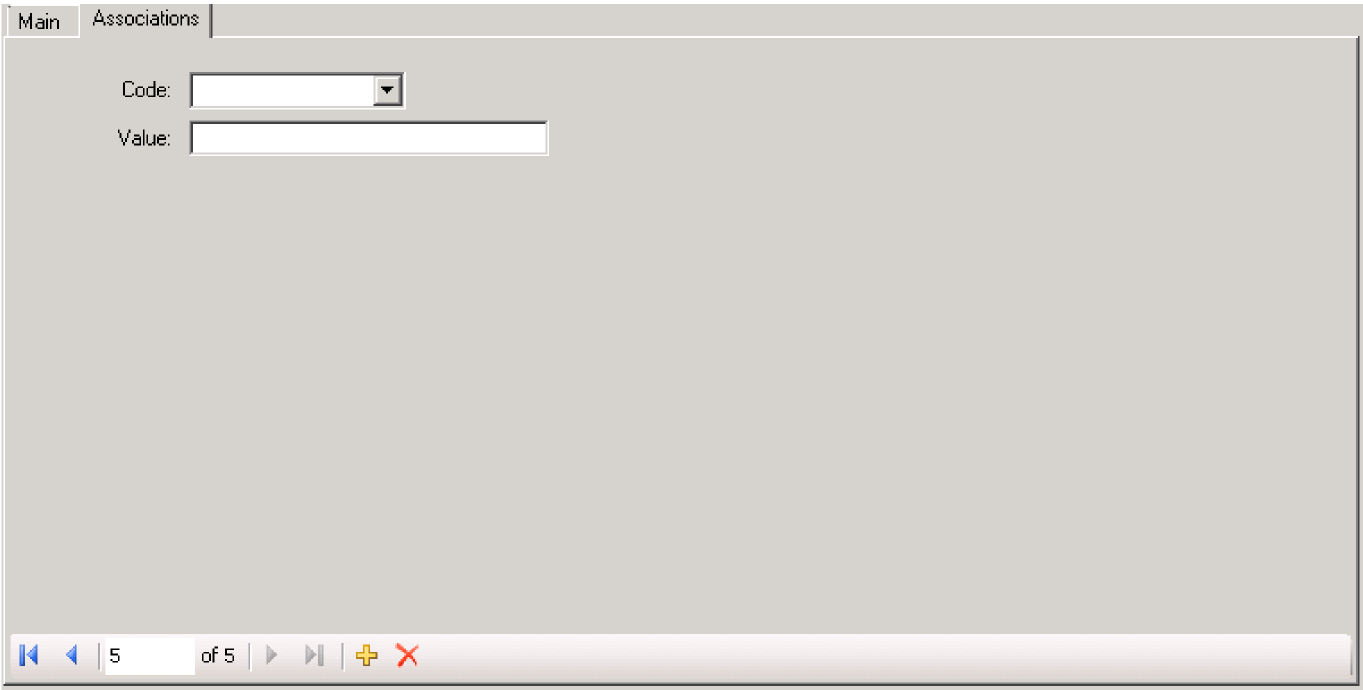


- o Select the Associations tab

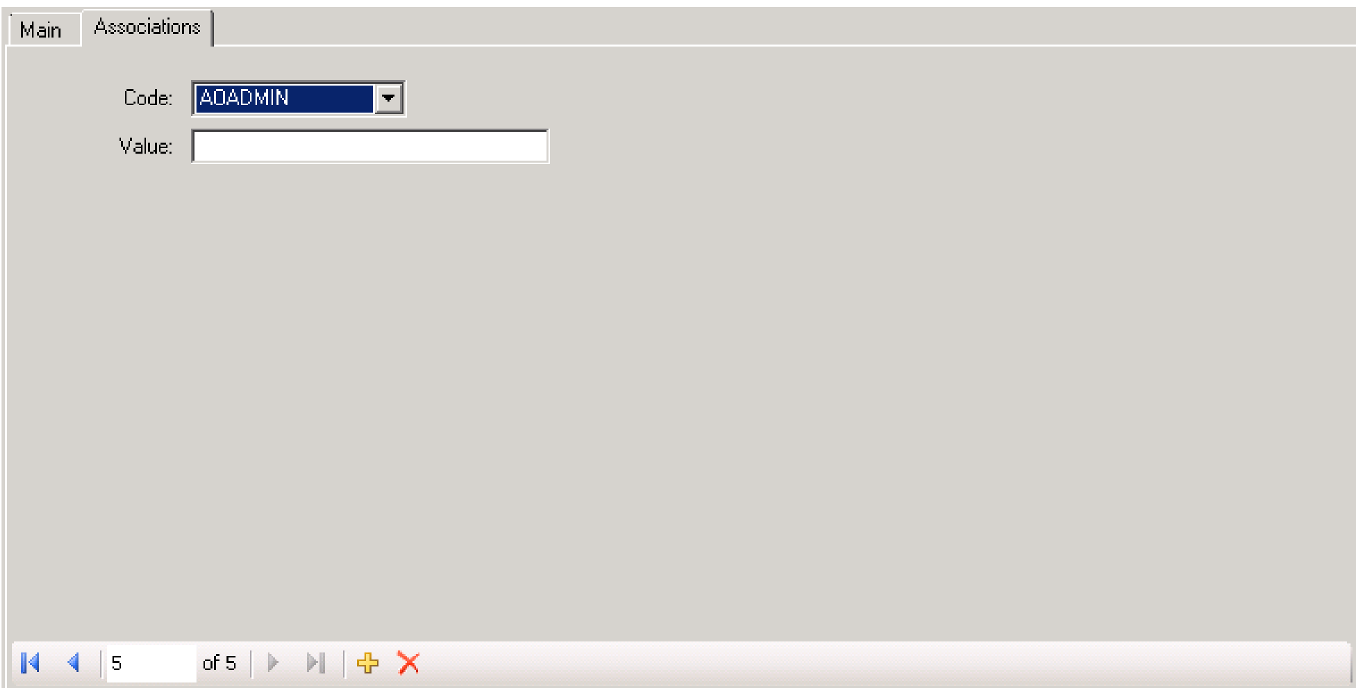


- Select the “+” (ADD) button at the bottom on the tab

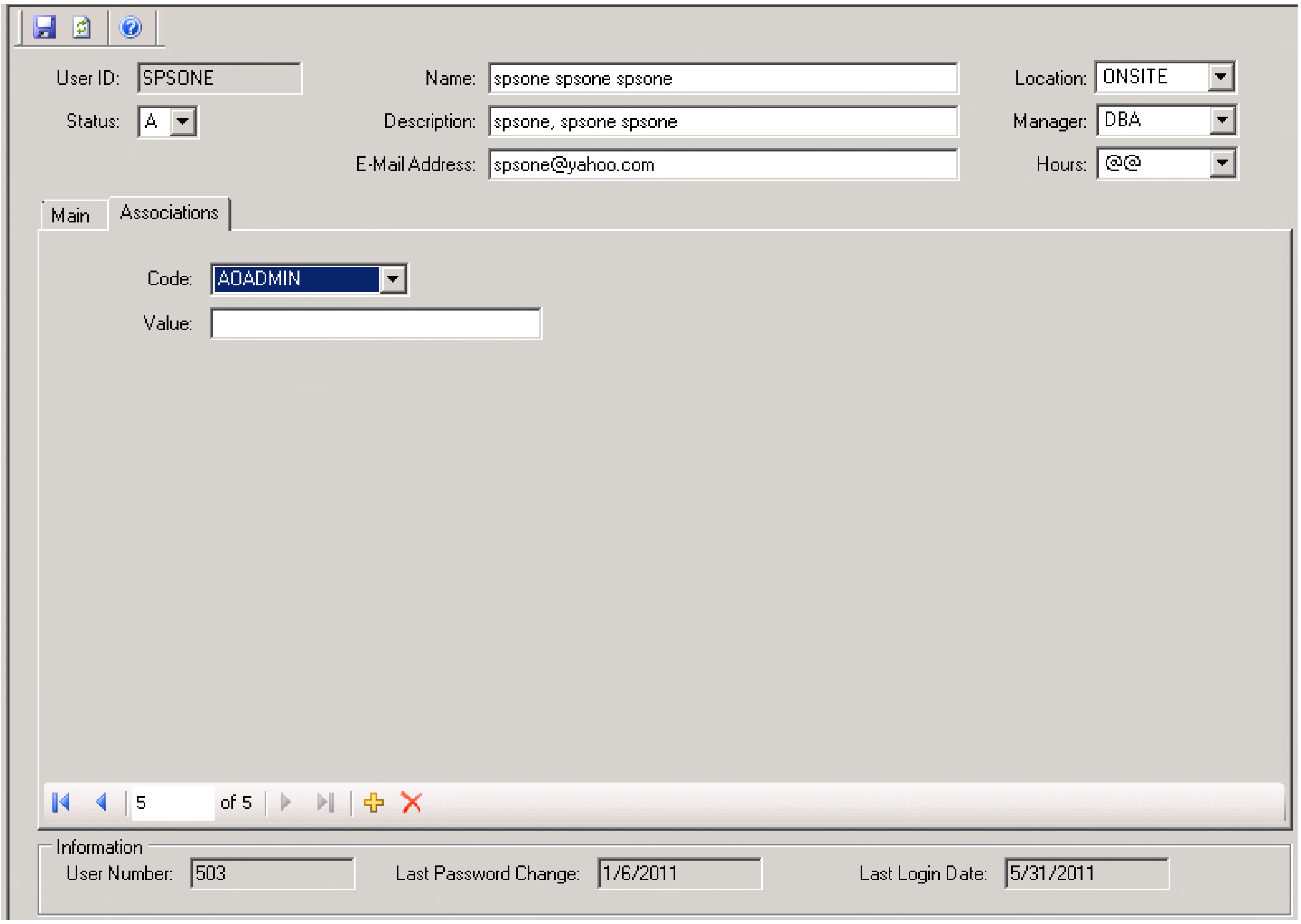




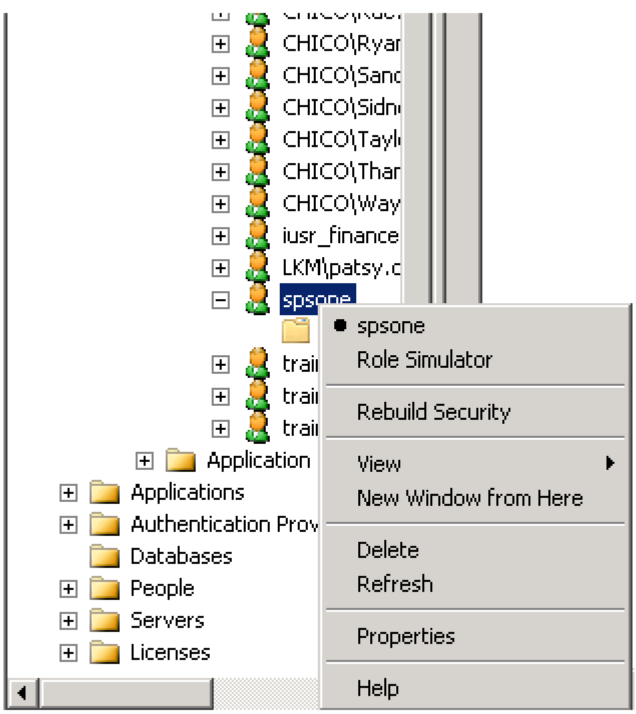
- Now in the code drop down, select AOADMIN



- Select Save (floppy disc icon) at the top of the screen to save this record



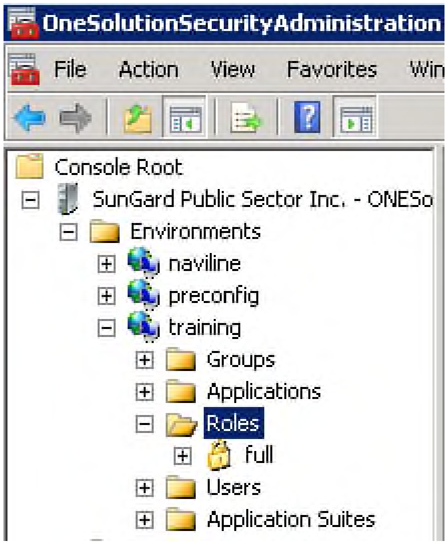
- Repeat the steps and this time select APPLY, in the code value, enter the User ID.
- Select the save option
- Now right click on the user name in the user folder



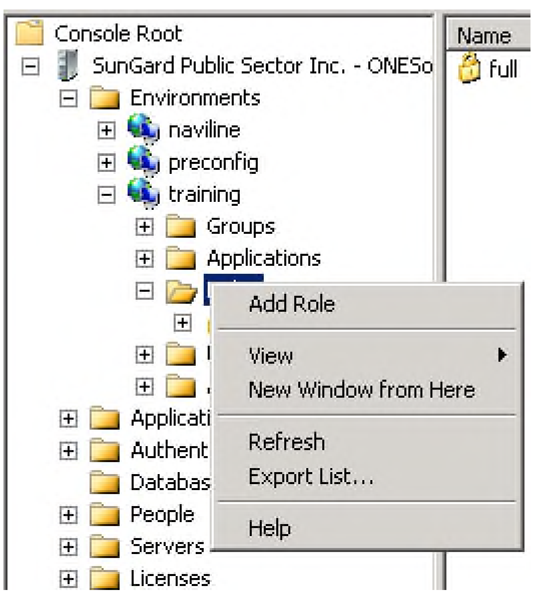
- Select Rebuild Security

2. **Administrator Security Role**

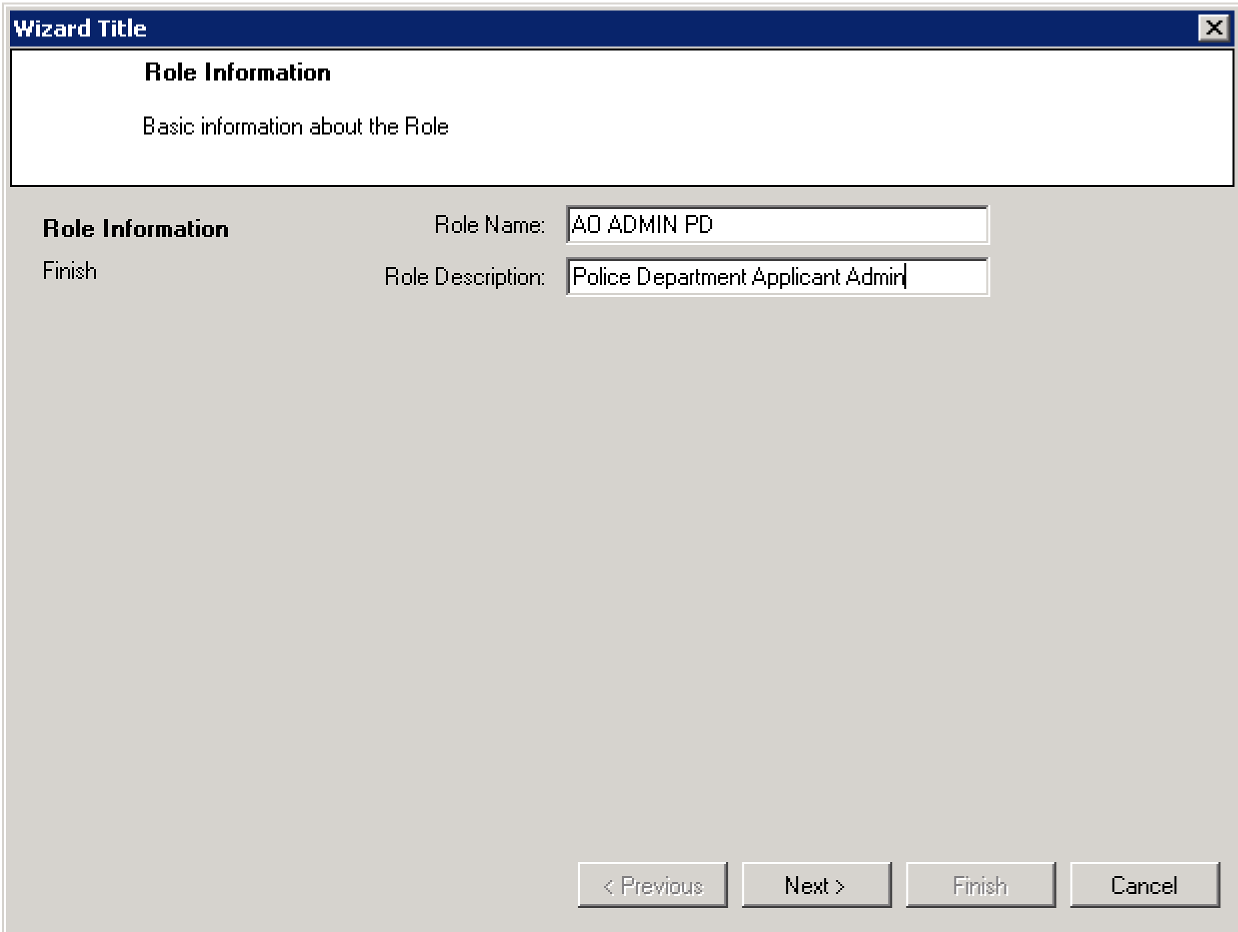
- Within the Security Console, select the correct account
- Select the Roles folder



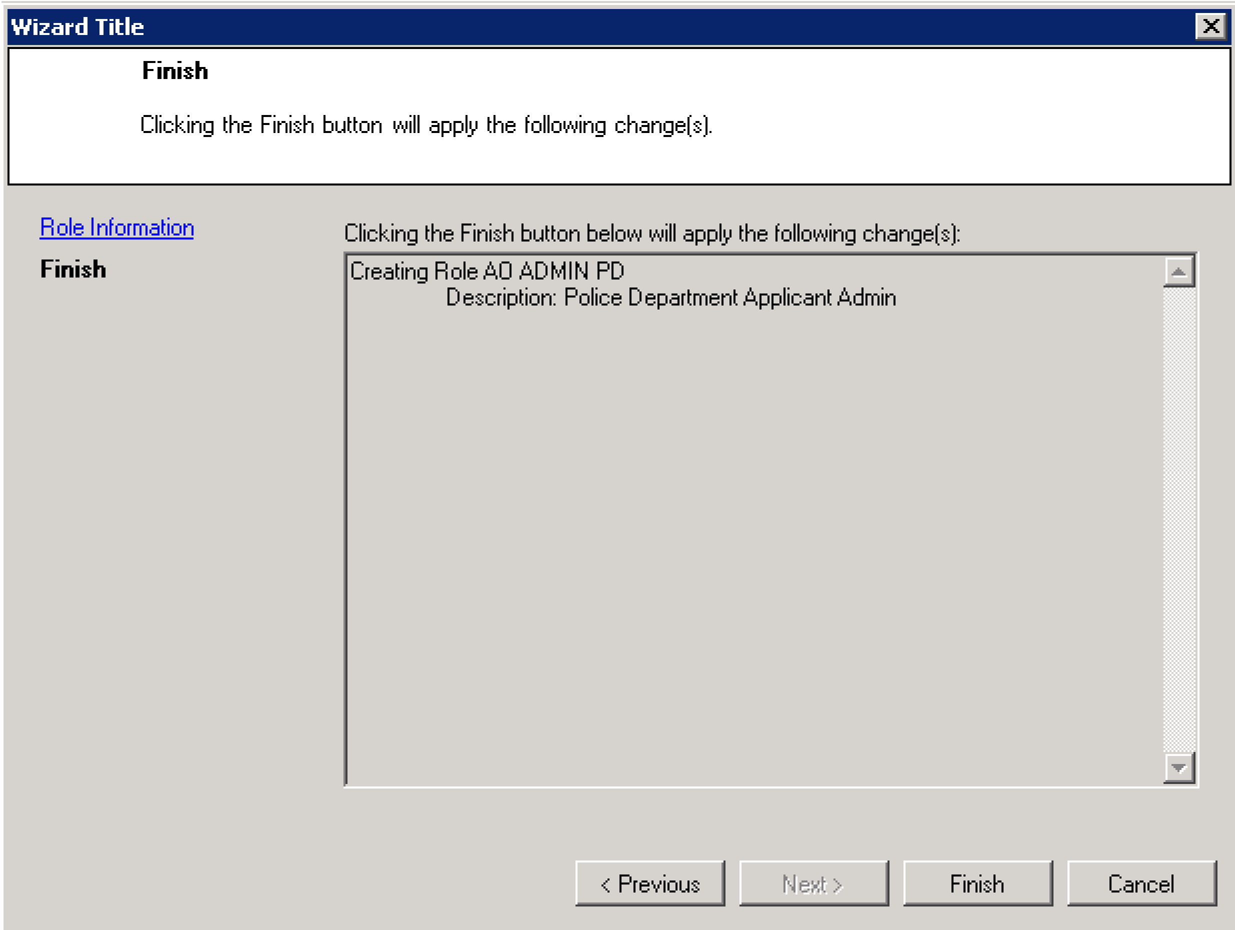
- Right click on Roles
- Select Add Role



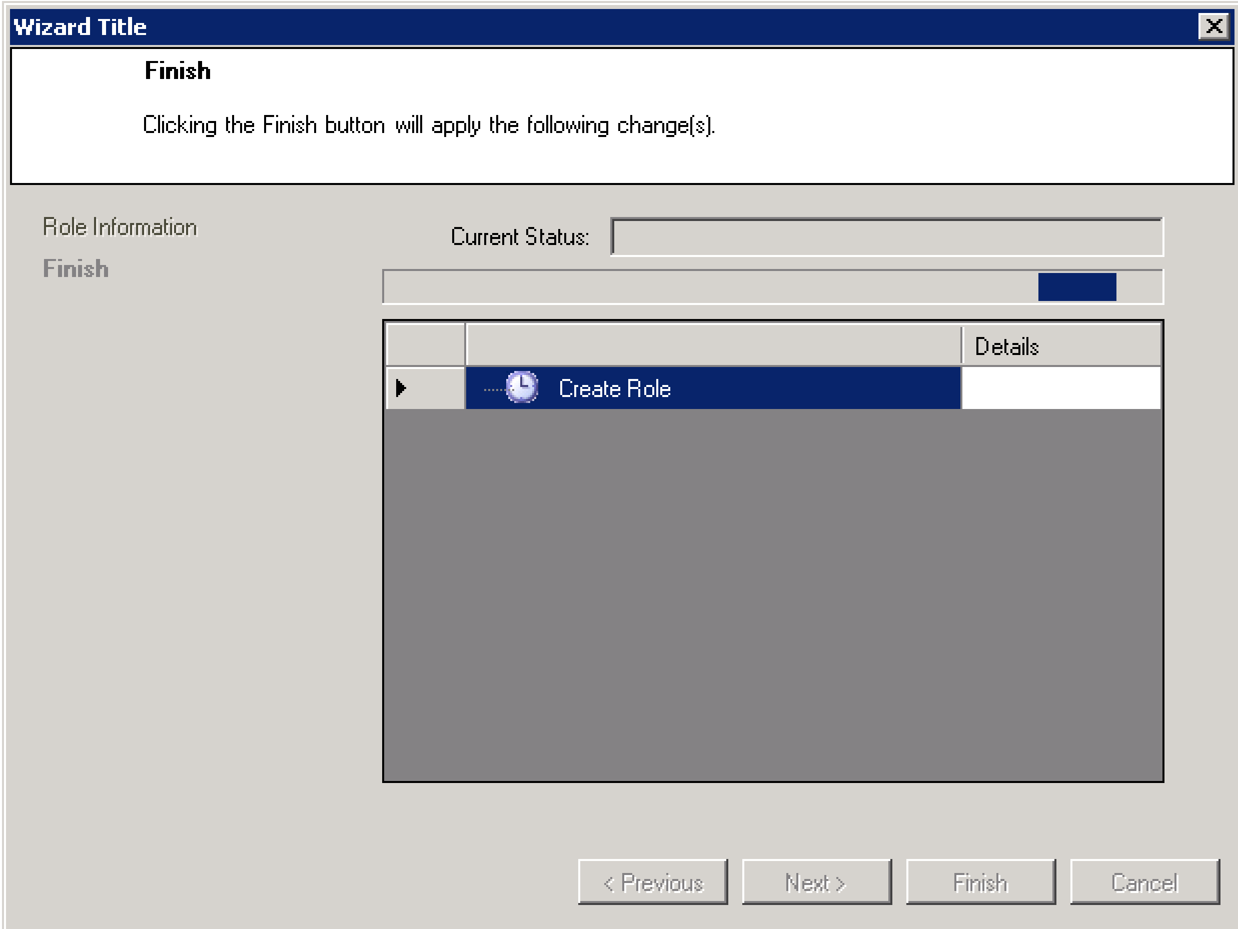
- Enter the Role Name and Role Description


Wizard Title
Role Information
Basic information about the Role
Role Information
Finish
Role Name:
AO ADMIN PD
Role Description:
Police Department Applicant Admin
< Previous
Next >
Finish
Cancel

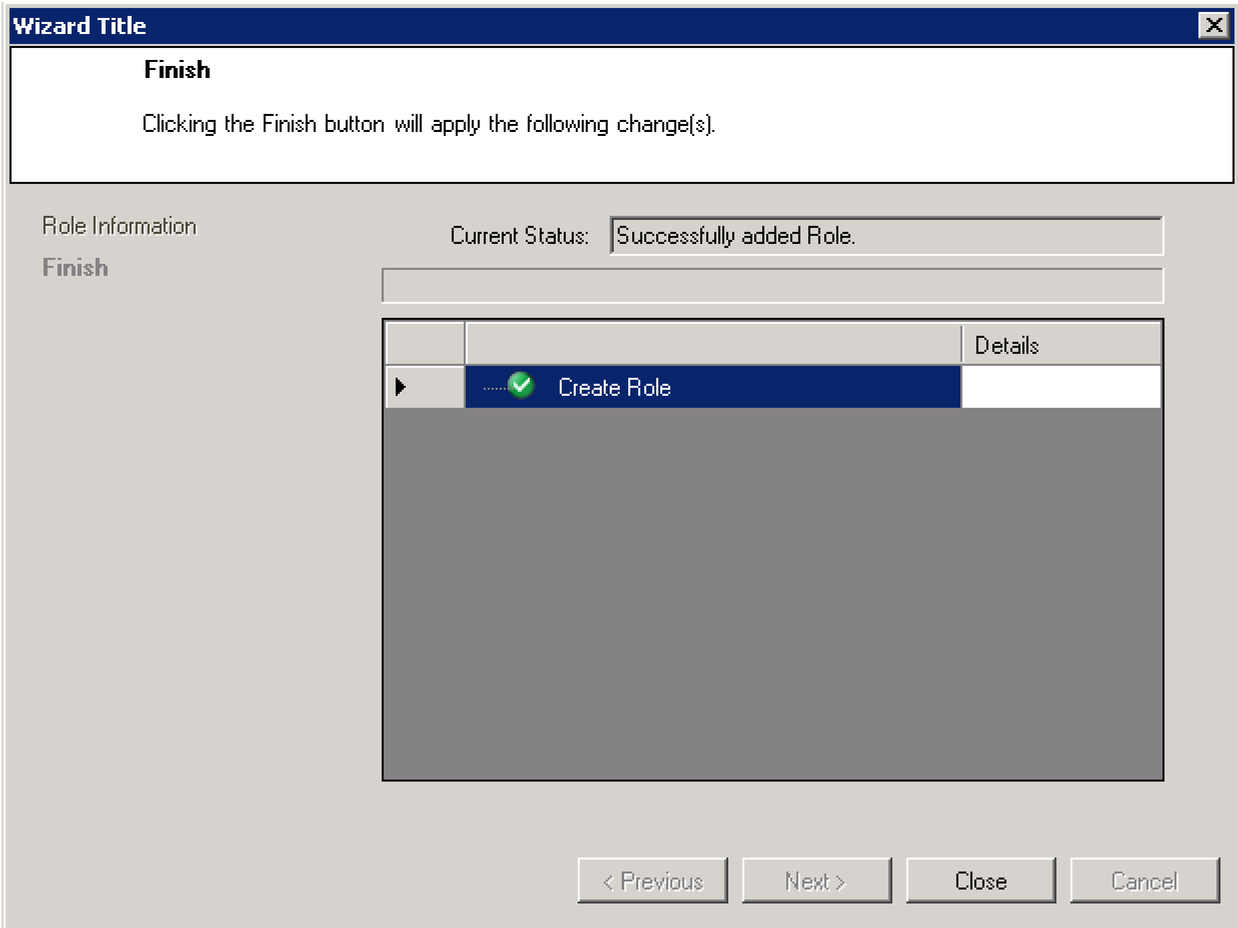
- Select Next



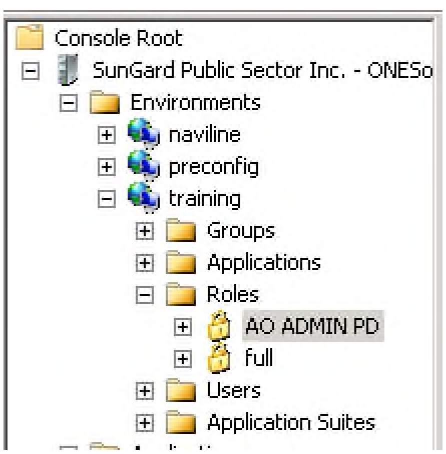
- Select Finish



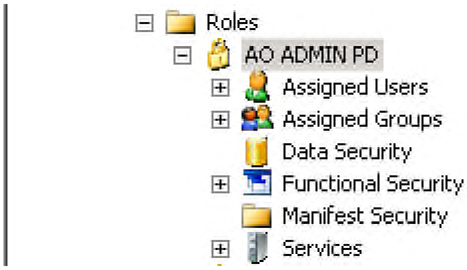
- Your role will begin to build



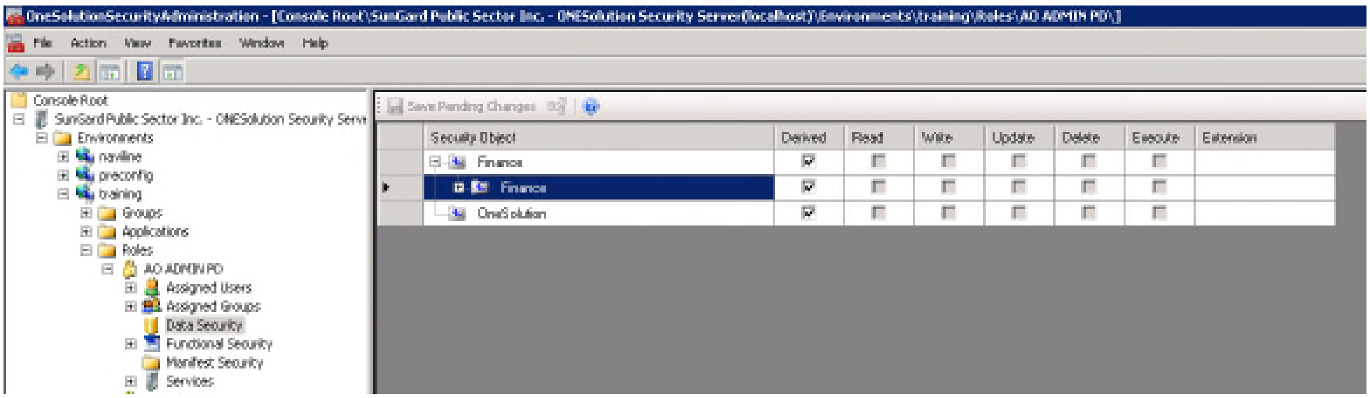
- Select Close
- Now in the Roles folder, you will see your AO ADMIN PD role



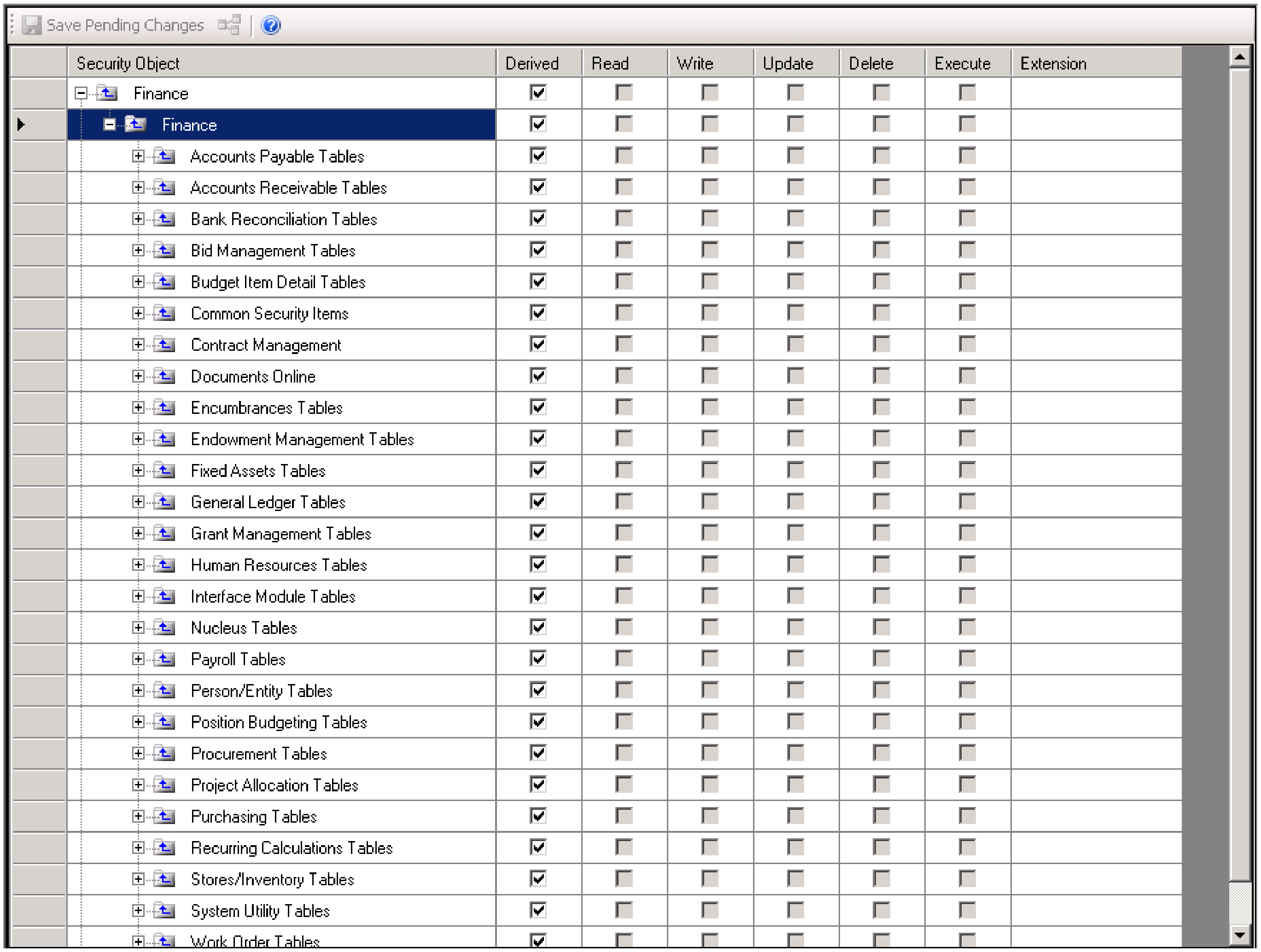
- Select the + option to expand your new role



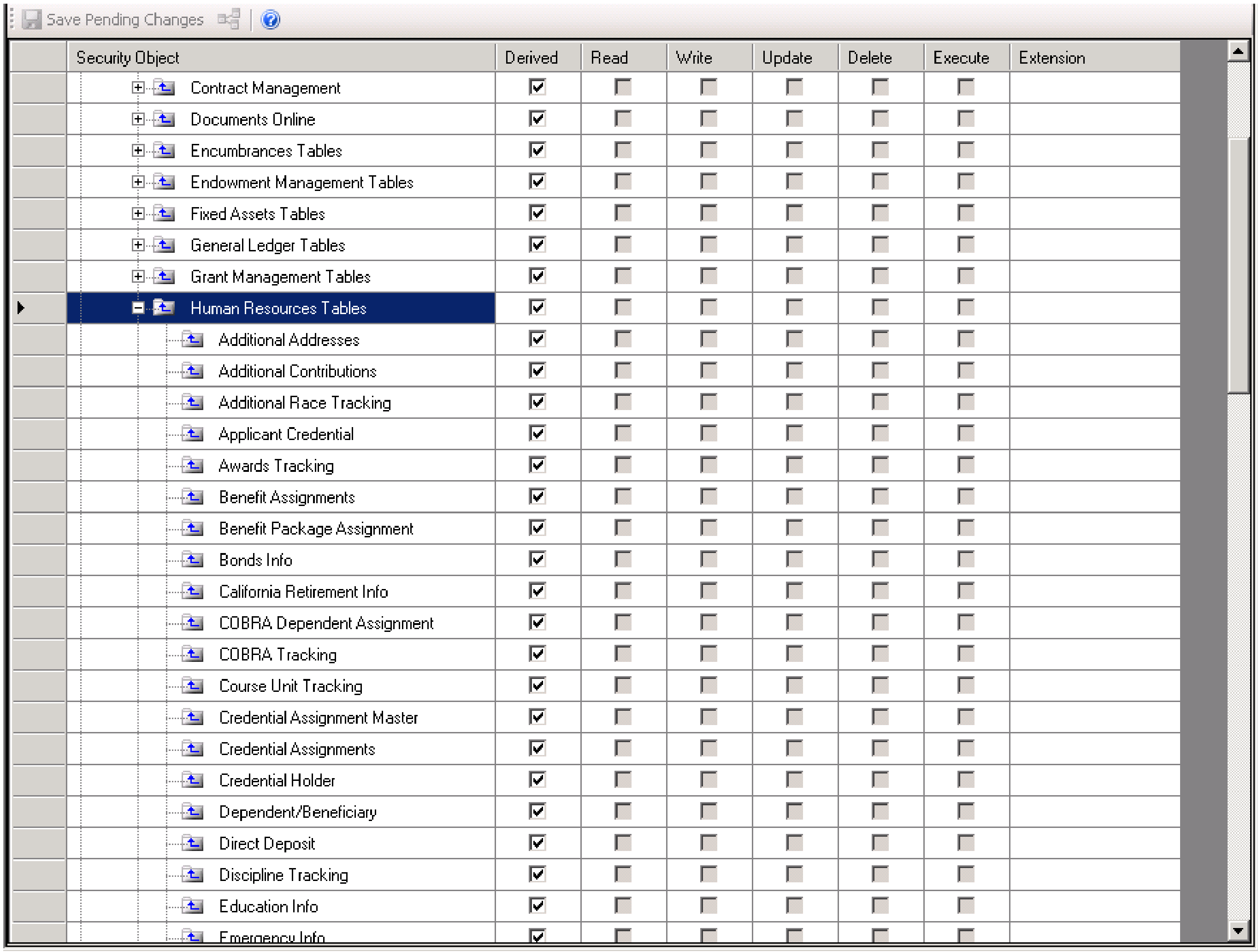
- Select Data Security
    - This will open up the security menu



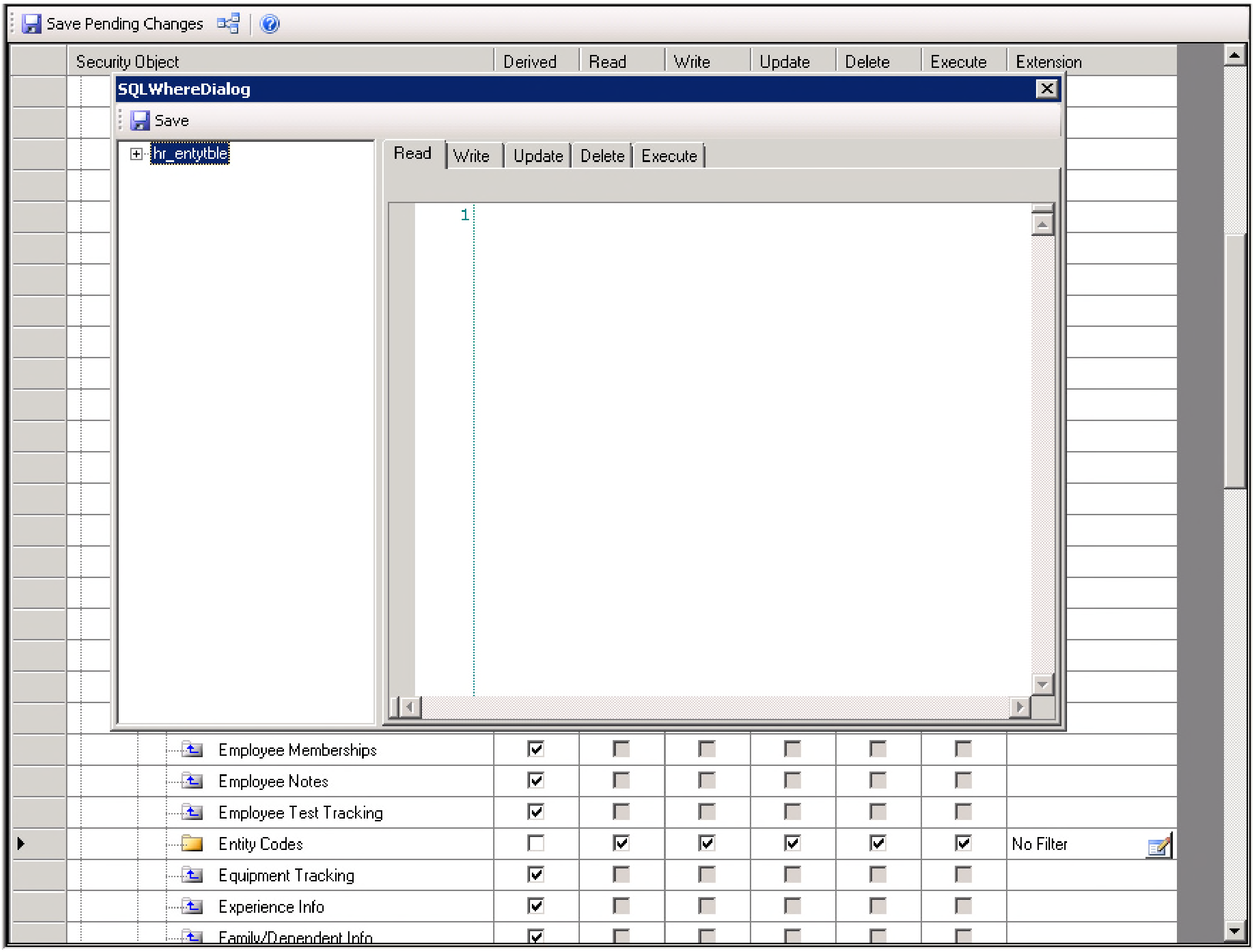
- Expand under Finance



- Select Human Resources Table



- Select Human Resources
- Select Entity Codes
- Uncheck ‘Derived’ and check all other boxes
- Select Filter



- Enter Location = '400' (location on HRAPRD that this posting was created for)
- Select all of the other tabs and select same as Read
- Be sure to SAVE!!!

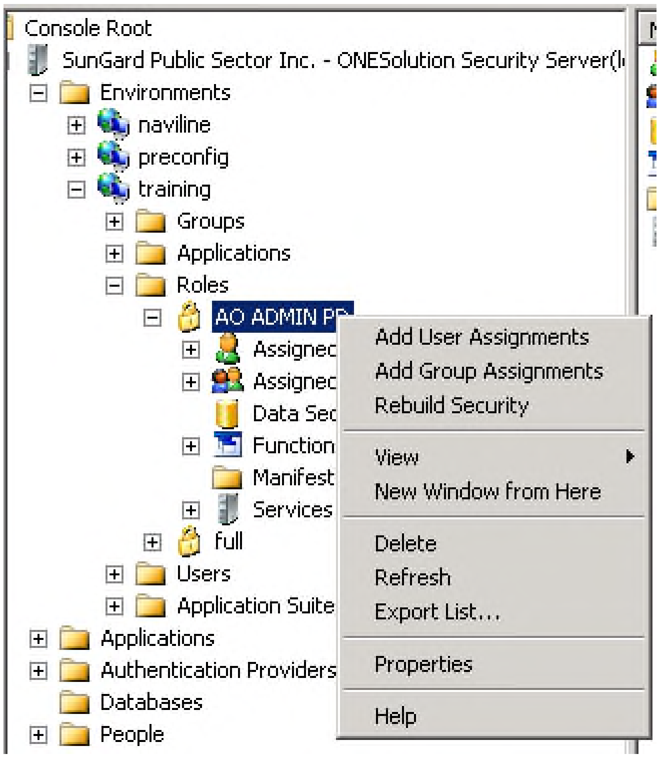
Setup a Class ID and Location for each location necessary.   For example, if the client has two locations, setup two class ID's with Location = '0006' and Location = '0007'

You can setup LOCATION to include multiple locations:

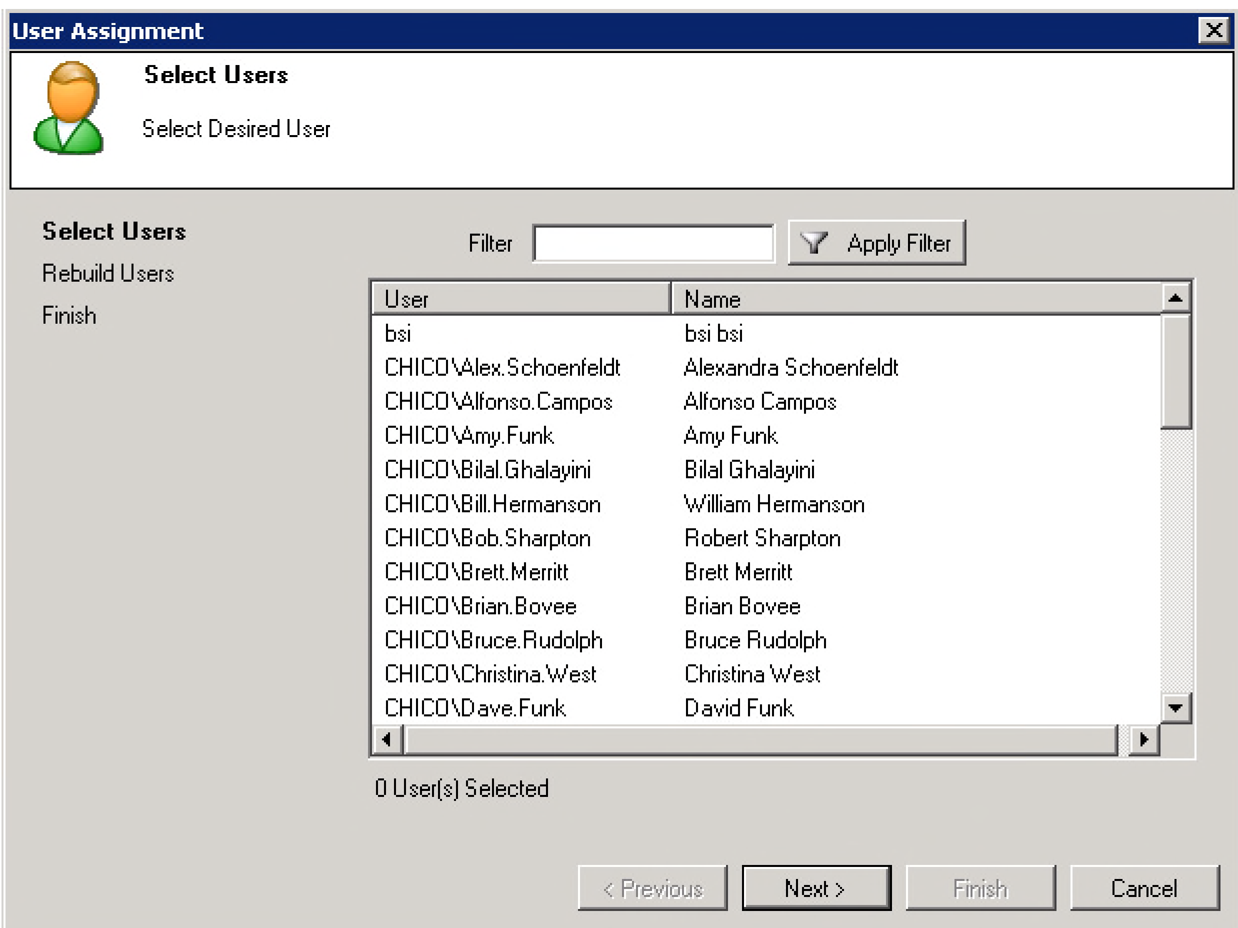
Location in ('0001','0002')

Assign each Role to the correct user

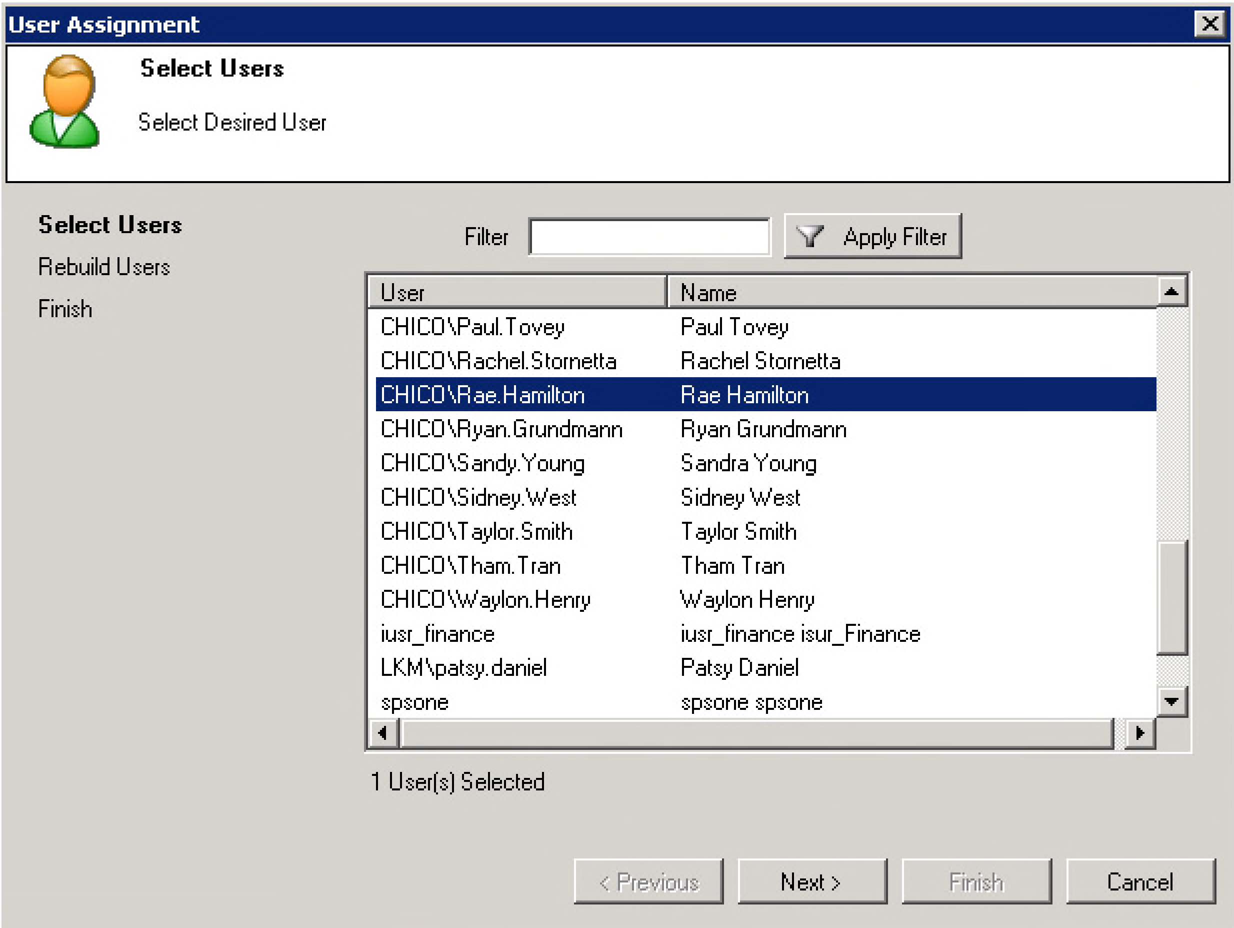
- Right click your role



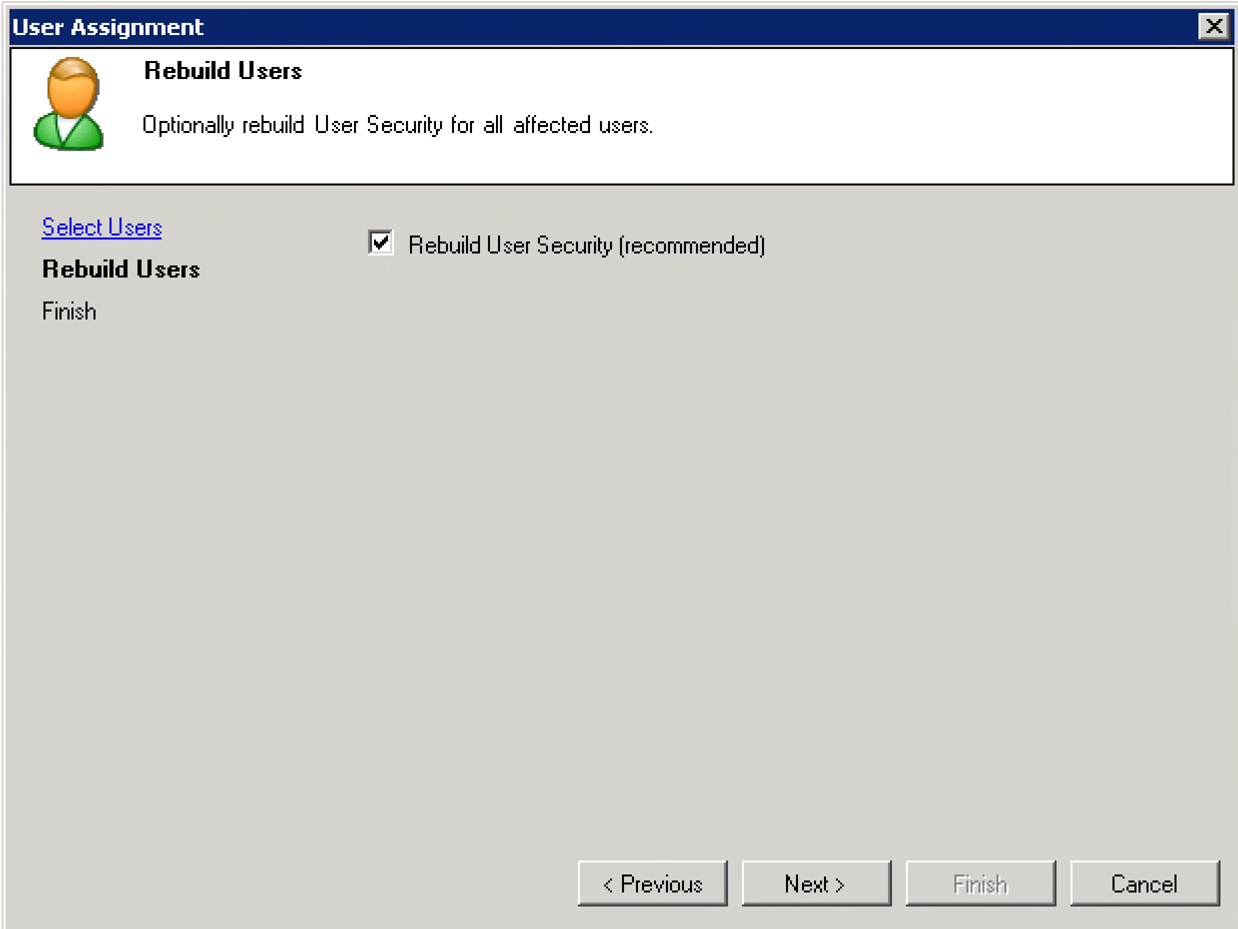
- Select Add User Assignments



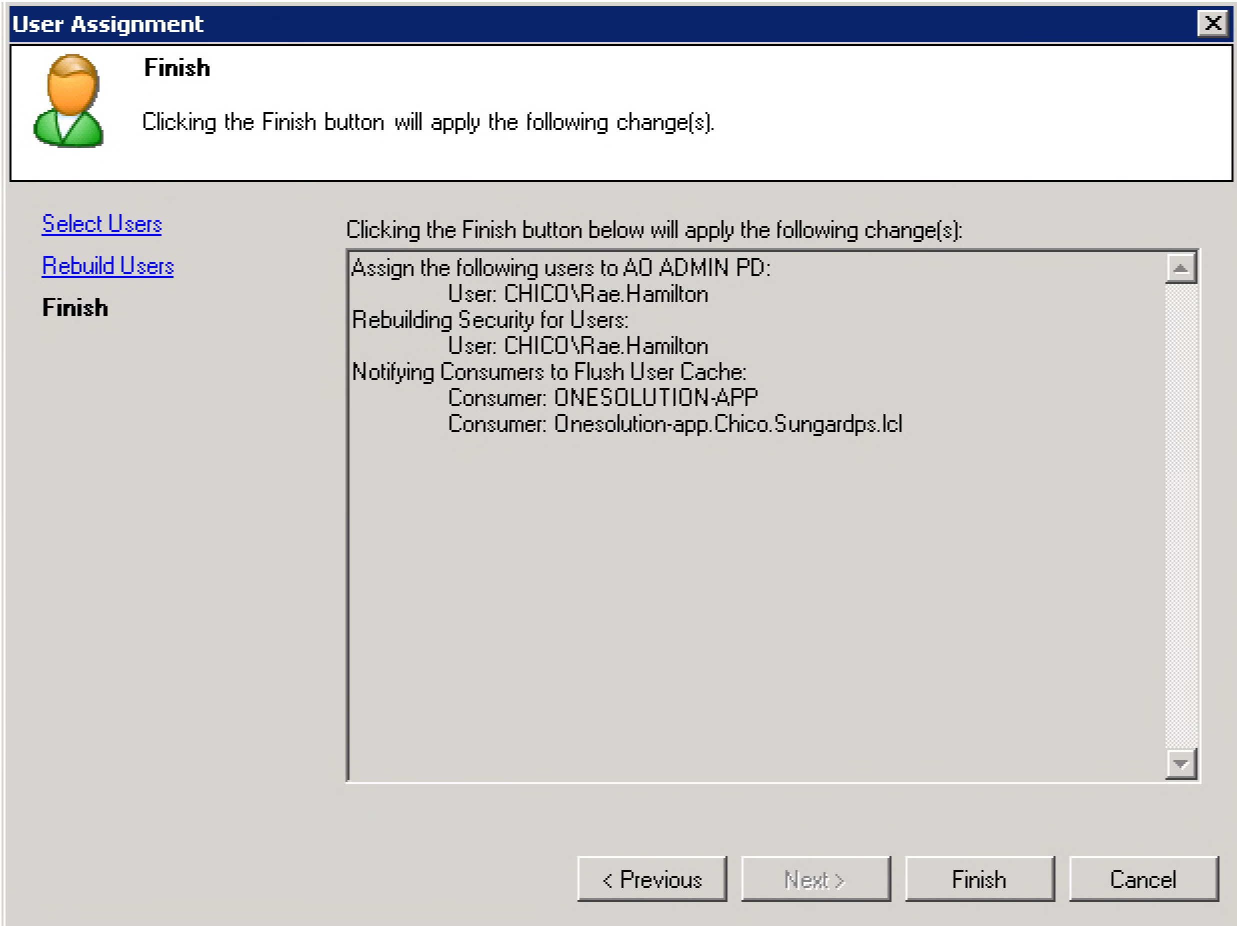
- Now select the correct user



- Select Next


User Assignment
Rebuild Users
Optionally rebuild User Security for all affected users.
Select Users
Rebuild Users
Finish
Rebuild User Security (recommended)
< Previous
Next >
Finish
Cancel

- Select Next



- Select Finish
- Repeat creating Roles and Adding them to Users until all roles are completed

2. Workflow Setup

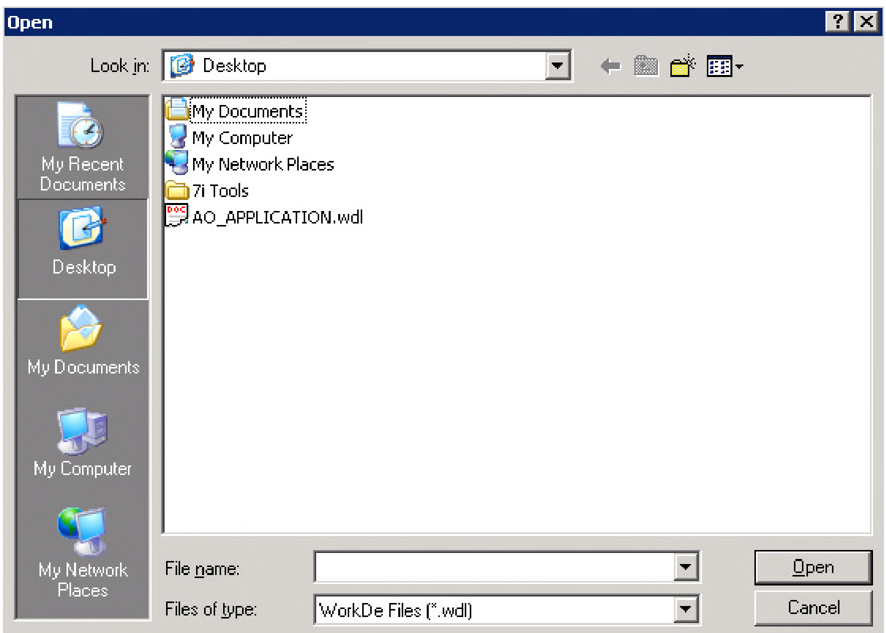
The exported workflow model is attached to the CRM ticket

Save attached workflow model to desktop

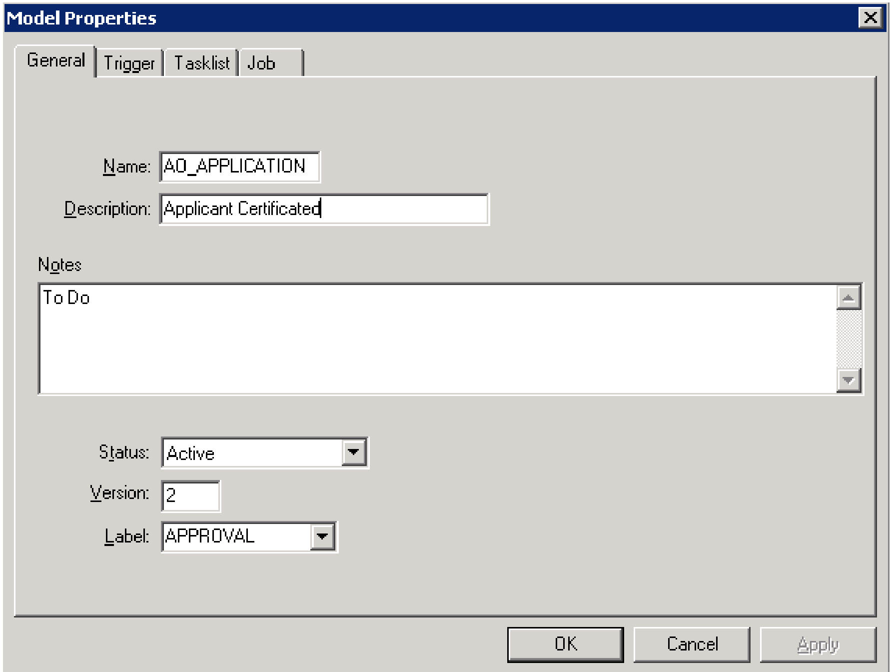
**When saving, remove the first numbers that CRM adds to the beginning of the file name.

Open Workflow Designer located on the server.

Select File/Import the workflow model, select the model and hit Open



Once the model is open, select Edit and change the status to Active and select Apply, then OK.



To set up email exception handler messages in the Workflow model:

Select “Edit” from the top menu bar

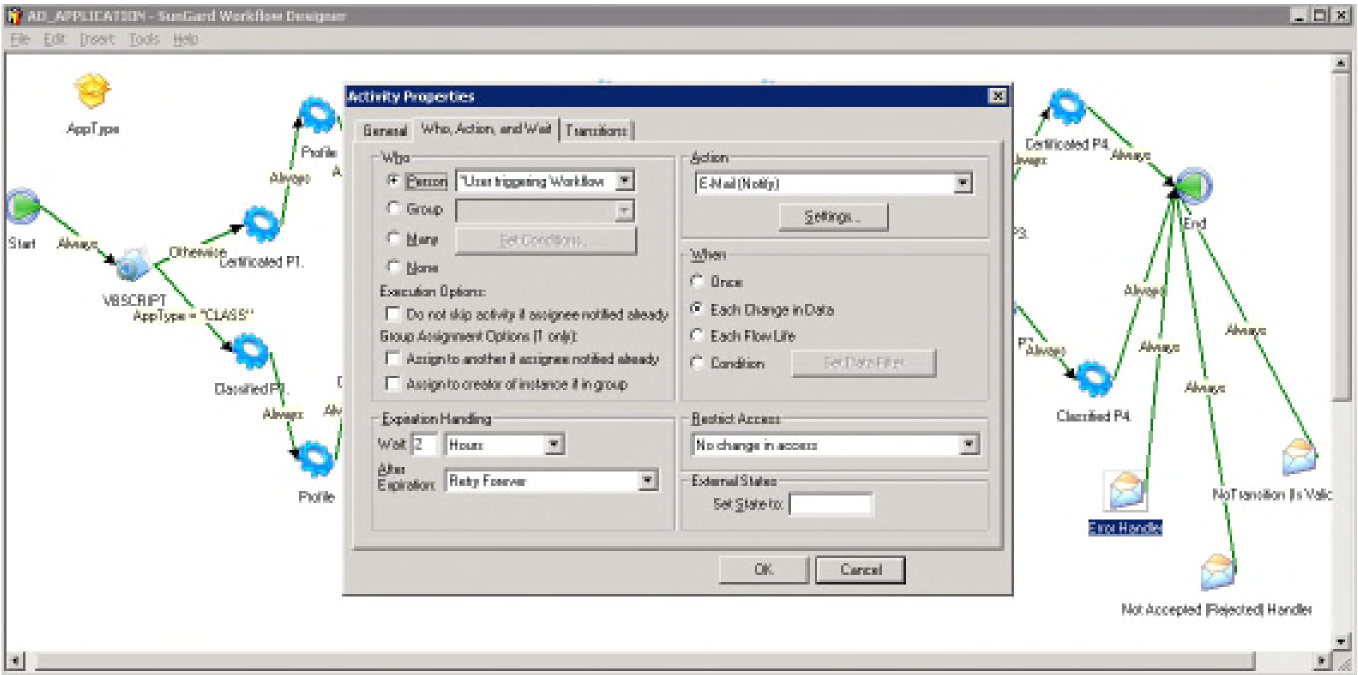
Click “View Activity Descriptions” so you can read the description labels of the nodes in the model.

There are three Handlers in the workflow model, represented as envelope icons (email activities), all pointing to the End arrow of the Workflow path.

1. “Not Accepted (rejected) handler” – this is if the user is rejected
2. “No Transition (is valid) handler” – there is no logical condition in model
3. “Error handler” – handles the error

For each of these handlers, email notification will be sent to one or more individuals in your organization responsible for monitoring the Applicant Online system. The email notification will provide specific relevant information regarding the event. The model is shipped with the default value being the User. ***You do not want to leave it this way!!!***

For each of the three selected handlers, double click on the envelope icon to open the “Activity Properties” window.



In the “Who” section at the top of the “Who, Action and Wait” tab, change the Person from “*User triggering Workflow” to the system/admin user you want to receive the email notification. The dropdown selector helps you find individuals defined in NUUPUS.

Note: The Person selected must have a valid email address in their NUUPUS record in order to receive notifications.

Click the “OK” button at the bottom. The window will close.

3. Web.Config Setup

Log onto the app server to find the web.config file. It should be stored in C:\inetpub\wwwroot\finance\home

Edit web.config and add the following red code to go with the existing blue code. Check the common codes (commented out next to the red code) and workflow model ID for the GREEN items and be sure to add those specific to the site you are doing the setup for:

```
<!--Applicant Online-->

<location path="Home/Applicant">

    <appSettings>

        <add key="UsnoDesc" value="7i Portal User"/>

        <add key="UsnoLocCd" value="ONSITE"/>          <!--(Common Code NULC)-->

        <add key="UsnoMgrCd" value="USER"/>            <!--(Common Code NUMG)-->

        <add key="UsnoHrsCd" value="@@"/>        <!--(Common Code NUHR)-->

        <add key="UsnoLpPrinters01" value="TERMINAL"/> <!--(Common Code NULP)-->

        <add key="UsnoFpPrinters01" value="TERMINAL"/> <!--(Common Code NULP)-->

        <add key="WFModelId" value="AO_CLIENTNAME"/>

        <add key="ProductName" value="SunGard Bi-Tech Applicant Online"/>

        <add key="AttachmentExtensions" value="doc, txt, rtf, jpg, pdf, tif, bmp"/>

        <add key="AttachmentFileLimit" value="4096"/> <!--4 Megs-->

        <!--<add key="SymantecScanServer" value="servername:1344"/>-->

    </appSettings>

    <system.web>

    </system.web>

</location>
```

Be sure that the Portal User information in SPSOne matches the web.config exactly otherwise Applicant Online will not work.

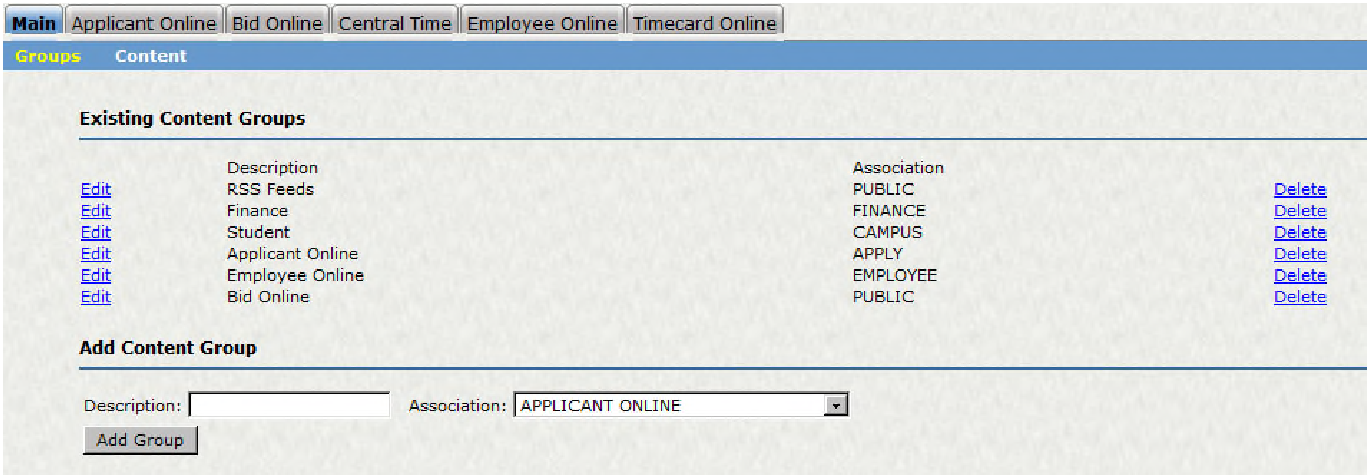
If a client is trying to attach an image that is not listed in “AttachmentExtensions” you may add the file here.

4. Desktop Setup

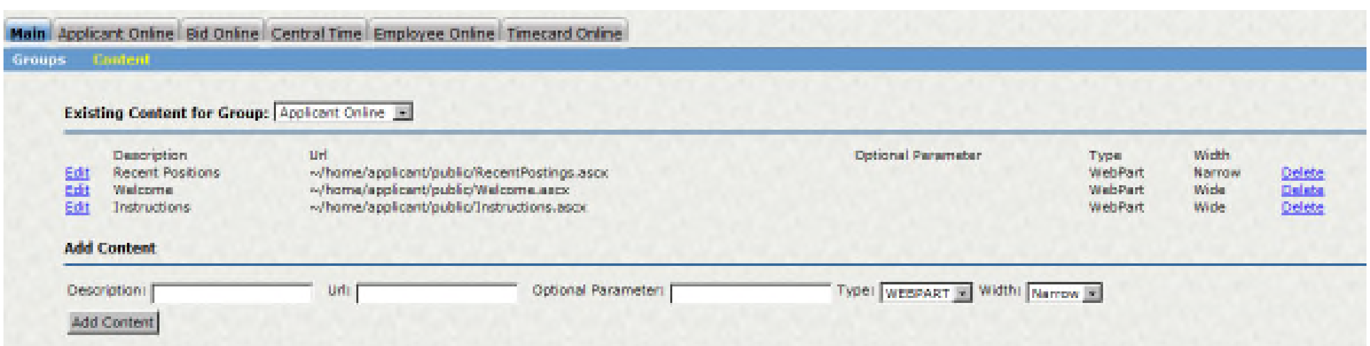
Customize Desktop

To get welcome page and Instructions to show up on Applicant Online you need to login to Portal Settings, NUUPPS.

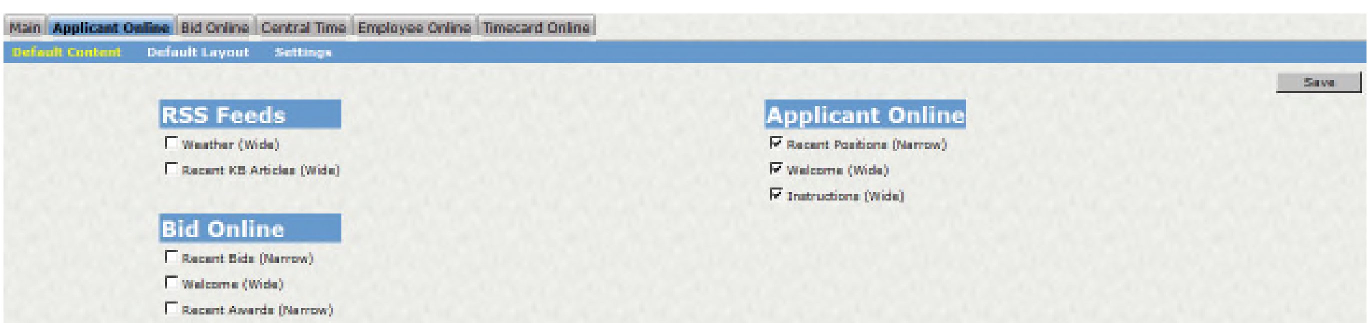
On the **Main** tab select **Groups** and make sure that for **Existing Content Groups** that Applicant Online has the Association set to APPLY.



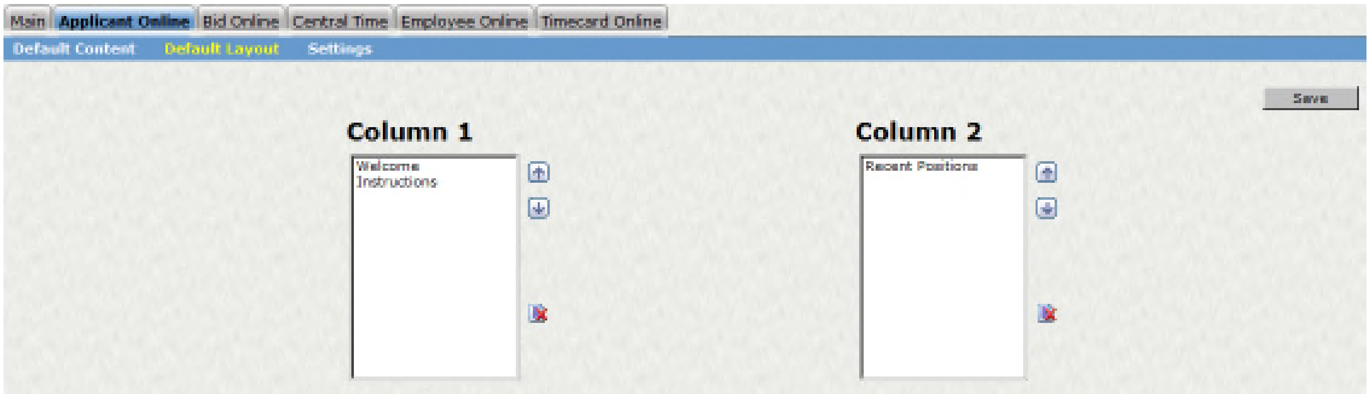
Then On the **Main** tab go to **Content** and make sure to add the pages and urls for Recent Positions, Welcome, and Instructions. Once the client's customized pages are created, be sure to reference their Welcome page – check which directory it's in on the server: It will generally be named with the following convention: **Welcome_(clientname).ascx**



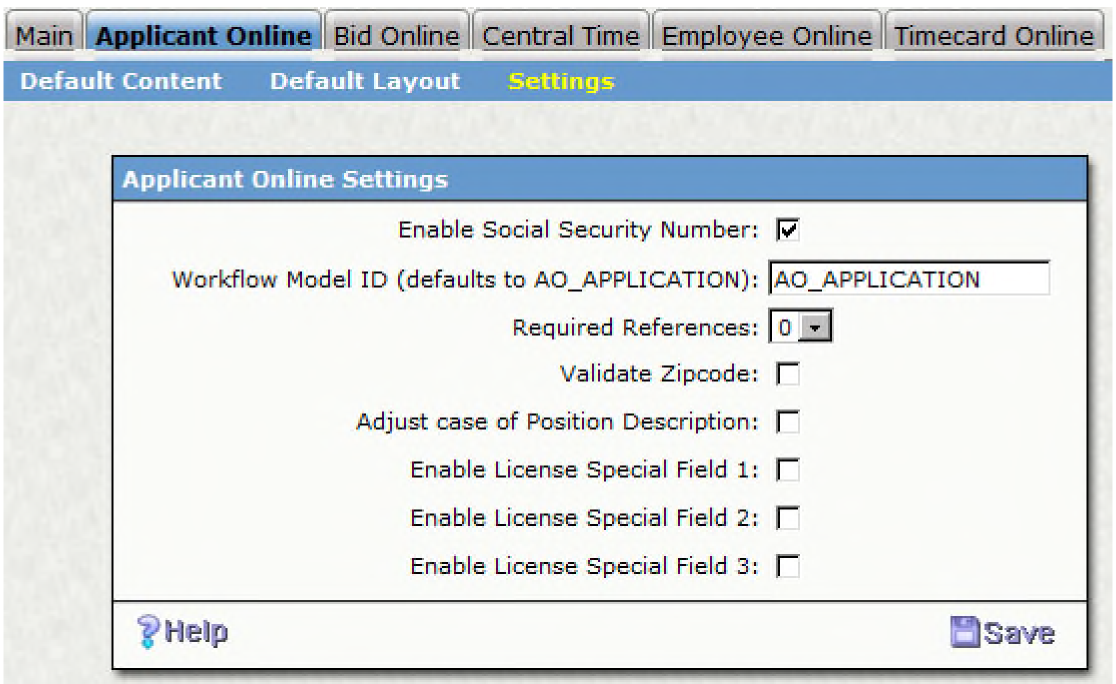
Then go to the **Applicant Online** Tab and select **Default Content**; put a check box in Recent Positions, Welcome and Instructions under Applicant Online. Make sure to **SAVE**.



Next select **Default Layout** and add Recent Positions, Welcome and Instructions into the columns. Make sure to **SAVE**.

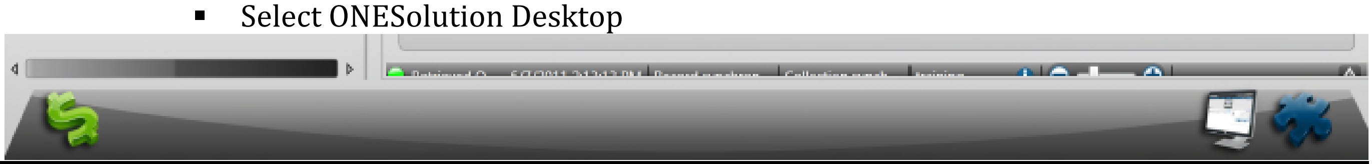


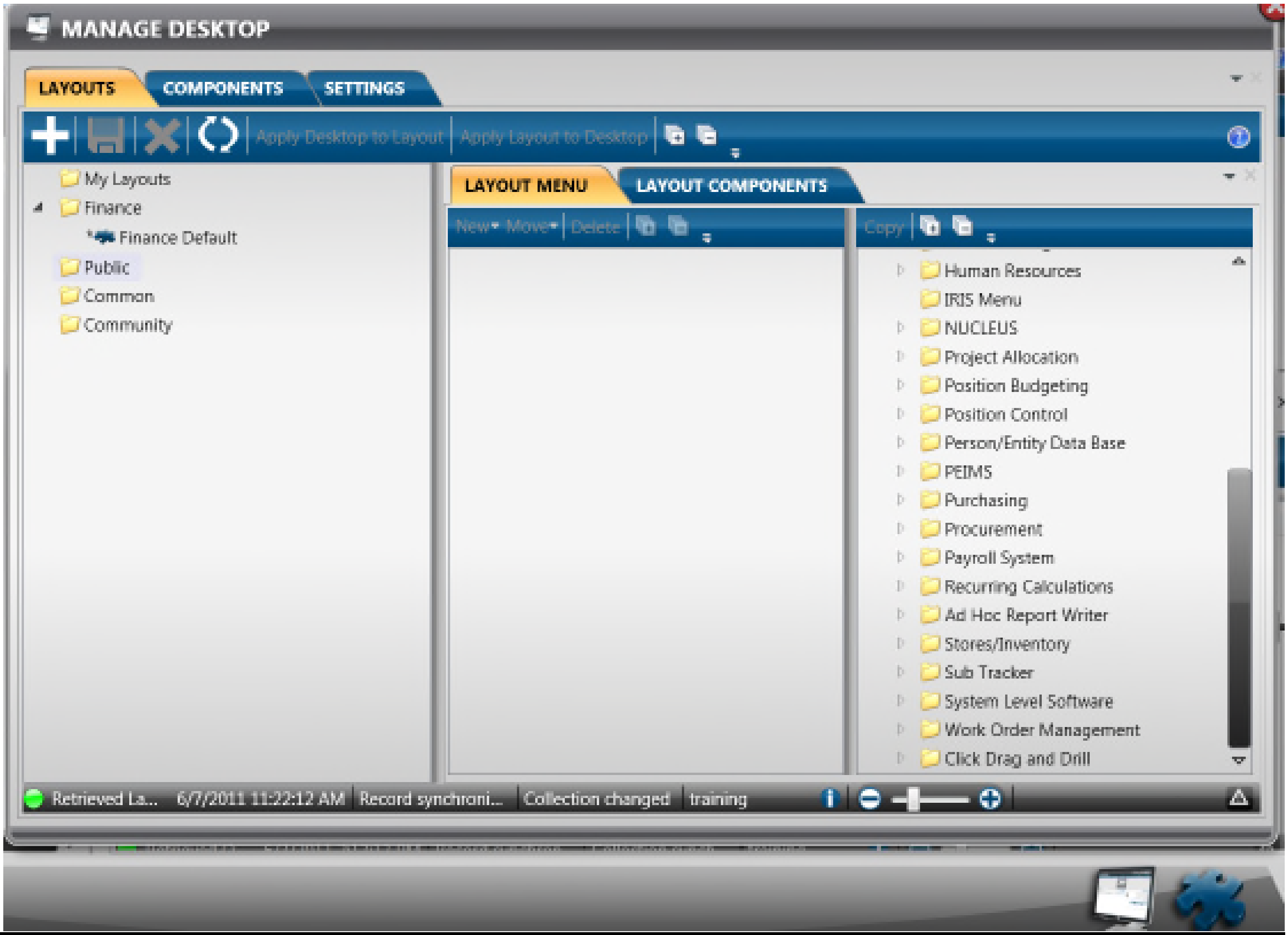
Next select **Settings** and enter the workflow model name and required references. The workflow model will generally be AO_CLIENTNAME. If none is entered, it will default to the AO_APPLICATION workflow model.



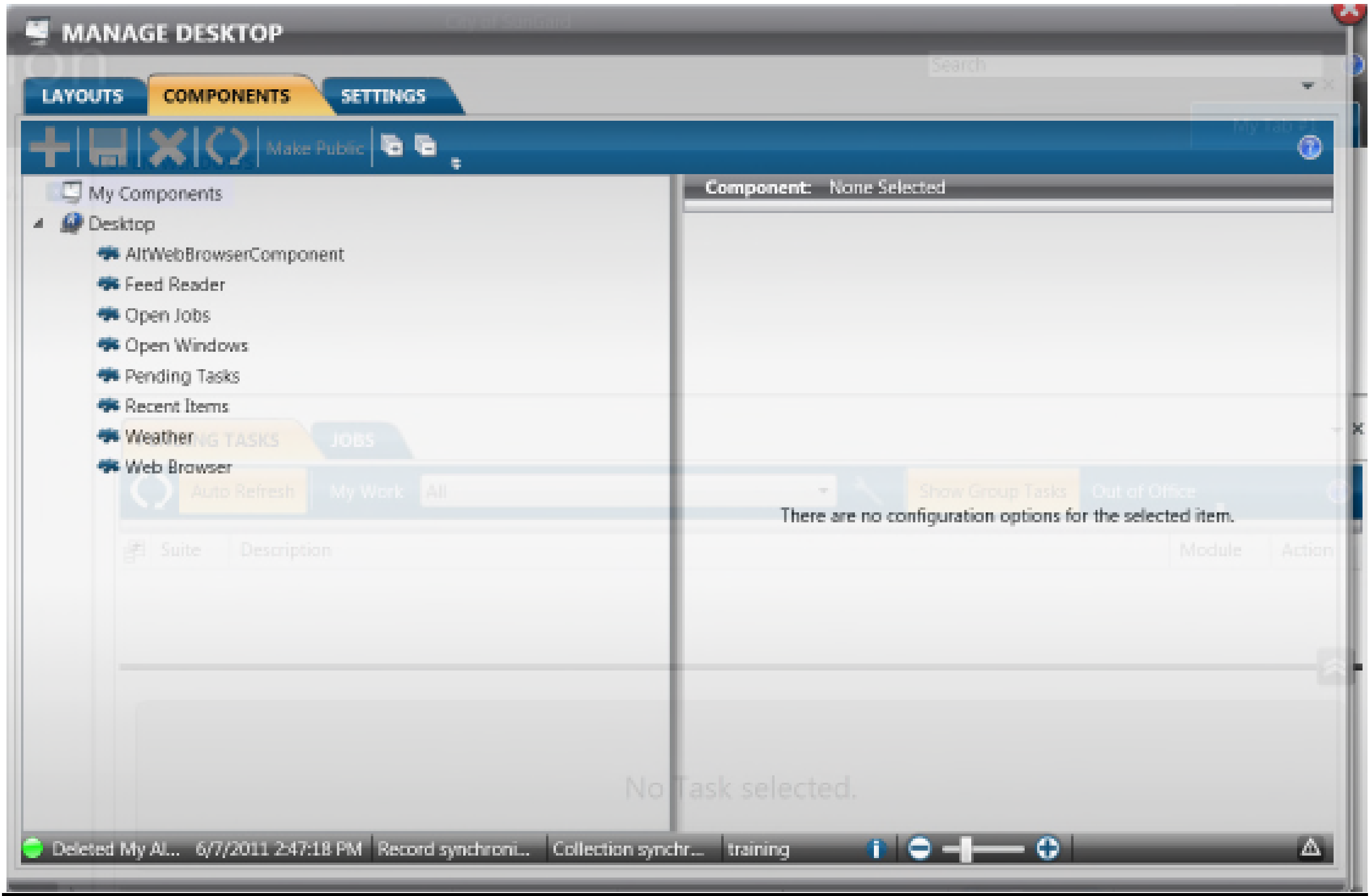
5. Add Administrator Site tab on Desktop

- Select ONESolution Desktop





- Select the Components tab

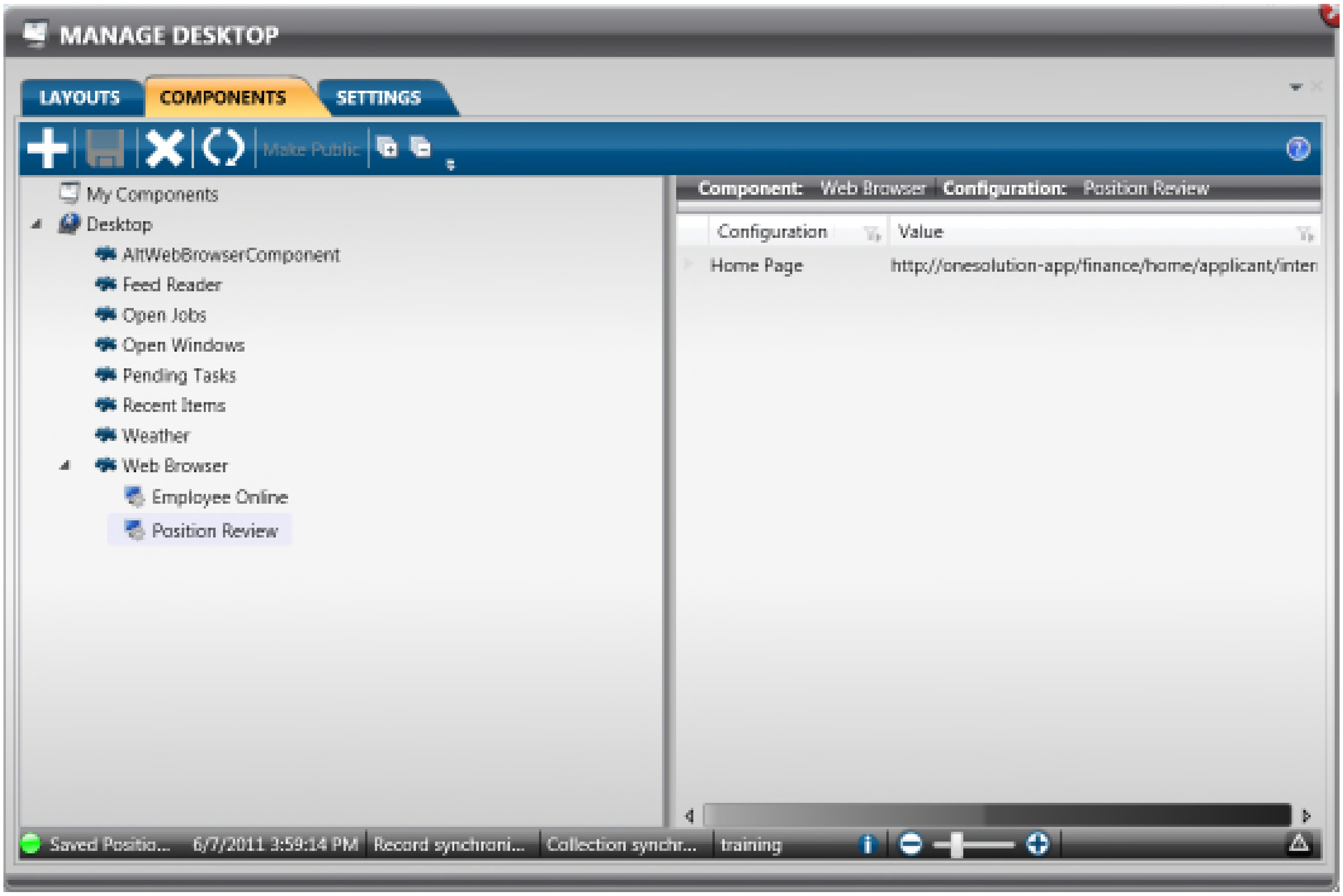


- Select Web Browser

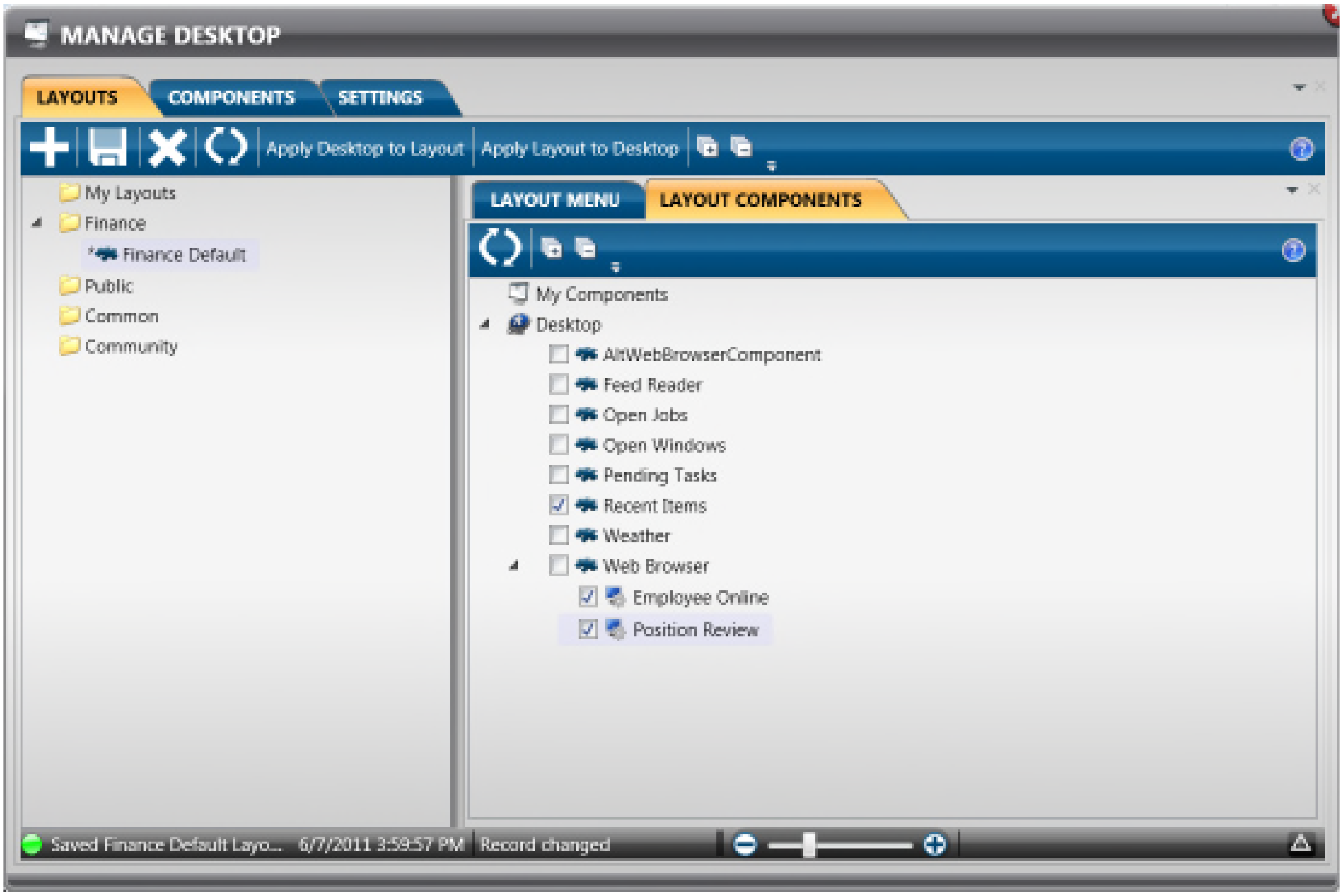
- Select the + Add option

  i. You'll now notice under My Components, an additional Web Browser
  ii. To the right, you'll notice a default of a google url.
  iii. Click in the value field and change this to:
    1. http://servername/finance/home/applicant/internal/posappstatus.aspx

- Select the Floppy Disk to Save your URL
- Select Make Public, this will move the link from My Components to Desktop
- Double Click your new Browser and change the title to Position Review
- Select Save to finalize

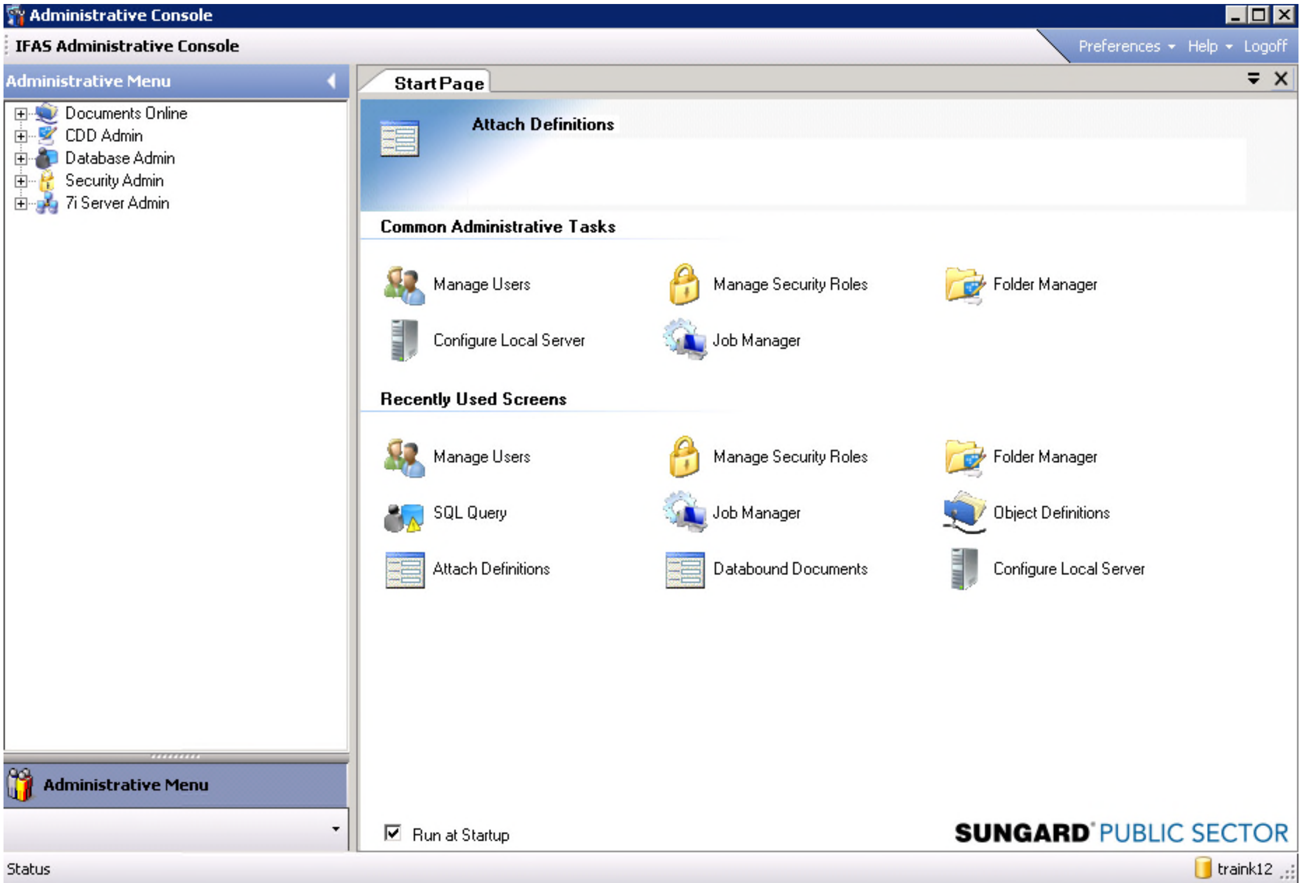


- Select the Layouts tab
- Select Layout Components
- Put a check in *Position Review*
- Select Save
- Select Apply Layout to Desktop



6. Documents Online Setup

- Open Admin Console
- Go to 'Attach Definitions'

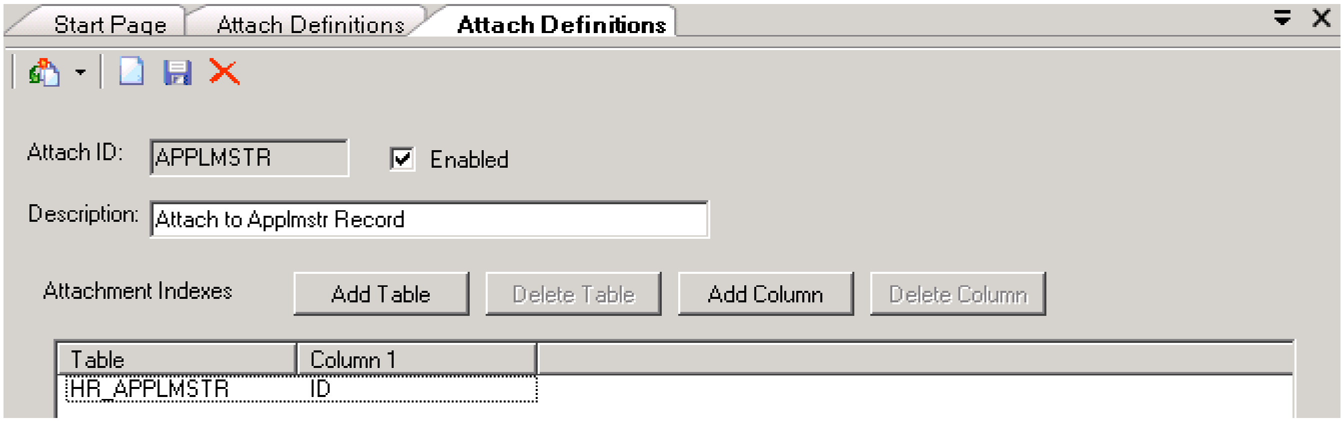


Note: Attach ID cannot have spaces or underscores!

- Create an entry for the Attach ID to be AOATTACH (generic) or RESUME, COVERLETTER, etc, that either link to:

Table	**Column 1**	**Column 2**
HR_APPLMSTR *(within AT screens)*	ID	
AO_APPLICATION *(within BLOB screen)*	ID	REQNUM

ID will attach the attachment to the applicant's user ID. The REQNUM will attach the attachment to the User's ID as well as to the specific application that they are on.



HR_APPLMSTR creates the attachment definition for the **My Information** tab when logged onto Applicant Online. Attaching a file here will send it to the Applicant Master (HRAPAM).

AO_APPLICATION creates the attachment within the application. This attachment will be accessible from the Internal Review Pages on the submit resume.

If the client would like to have all attachments attached in one area, they will want to note that in the application.

5. Table Setup

a. Required Setup

Many fields in Applicant Online and Applicant Tracking validated against tables found in the Human Resources Primary Tables Module and Nucleus Common Codes. Many of these codes are completed since they are being used in the Human Resource tracking screens.

Non-Entity Specific Codes (HRTBHR) and Entity Specific Codes (HRTBCE)

HRAPAM – APPLICANT MASTER

Screen	Code ID	Purpose
HRTBHR	APPLICANT_STAT	Active or Inactive applicant
HRTBHR	COUNTY	County of applicant

HRAPAD – APPLICANT INFORMATION

Screen	Code ID	Purpose
HRTBHR	ACTION CODE	AO, AONT
HRTBHR	LICN/CERT TYPE	License and Certification types
HRTBHR	LICNCERT_SPECFLD	User definable if more information about licn/ cert if needed
HRTBHR	LICNCERT_SPEC1	
HRTBHR	LICNCERT_SPECFLD	
HRTBHR	LICNCERT_SPEC2	
HRTBHR	LICNCERT_SPECFLD	
HRTBHR	LICNCERT_SPEC3	

HRTBHR	DEGREE_CODE	Education level
HRTBHR	MAJOR_CODE	Major
HRTBHR	MINOR_CODE	Minor
HRTBHR	INSTITUTION_CODE	Institution attended
HRTBHR	SKILL_CODE	Skills
HRTBHR	EXPERIENCE_CODE	Prior work experience
HRTBHR	APPLICANT_TEST	
HRTBHR	HURDLE_CODE	
HRTBHR	INTERVIEW_CODE	Interview rating

HRAPEO – APPLICANT DEMOGRAPHIC AND EEO

Screen	Code ID	Purpose
HRTBHR	DISABILITY_CODE	EEO Information for disabled workers
HRTBHR	MARITAL_STATUS	

HRAPPS – POSTING INFORMATION

Screen	Code ID	Purpose
HRTBCE	APPLICANT_TYPE	
HRTBHR	REFERENCE_CODE	Where the applicant heard of the position
HRTBHR	AVAILABILITY_CD	Full time, part time, etc
HRTBHR	LETTER_CD	Types of letters sent to applicant
HRTBHR	APPL_DISPOSITION	X for rejecting an application and HIxx for hiring an applicant

HRAPRD – REQUSITION DEFINITION

Screen	Code ID	Purpose
HRTBHR	REQ/POSTING TYPE	Internal/ External or Both
HRTBHR	POSTING STAT	Inactive or Active
HRTBCE	LOCATION TAB	Where the position is located
HRTBHR	POS/JOB_TYPE	Must match on PCN and Job Tables

19. Applicant and Tracking Screen Required Common Codes (NUUPCD)

Code Category	Code Value	Purpose
PYAA	XX	Ethnicity and Ledger @@
PEAD	PM	Primary Address Code and Ledger @@
PEST	XX	State
PECO	XX	County
HRPY	SSNCHECK	Validates against duplicating SSN’s when hiring applicant

20. Setup Required Common Codes (NUUPCD)

Code Category	Code Value	Purpose
SYNO	POSTROOT	Auto generate requisition numbers

NUAS	AOALL	Receive e-mails for new postings
NUAS	APPLY	Association in NUUPUS

Important Note:

You need to include OTHER as a drop down selection in tables like INSTITUTION, MAJOR, SKILL, etc. When that is selected it prompts the user to key in the 'Other' box with their information that is not listed in the drop down. Also be sure to add the ACTION CODES of AO and AONT. A disposition of X must be entered in order for an applicant's resume to be rejected and a disposition starting with HIxx must be entered in order to hire.

It is important to note that in order for any of these drops down list to work you must have information setup in your database.

6. Appendix

a. Eligibility Lists

In some scenarios there is not an actual job opening but, rather, the need to simply enter applicants interested in a general area (i.e. applicant who submits resume for any future openings in computer services). In this case an **eligibility list number** is entered **in lieu of** the **posting / requisition number**. The applicants assigned to this eligibility list number are said to be on an "eligibility list". This eligibility list can be useful when a job opening actually occurs in the area associated with the eligibility list. The system can then take all applicants on the eligibility list and automatically assign them to the newly created posting / requisition number; eliminating entering all applicant data twice.

Before posting a job opening determine the extent to which this module will be used by answering the following questions. Consider the following questions to determine if you intend to use eligibility lists in the system.

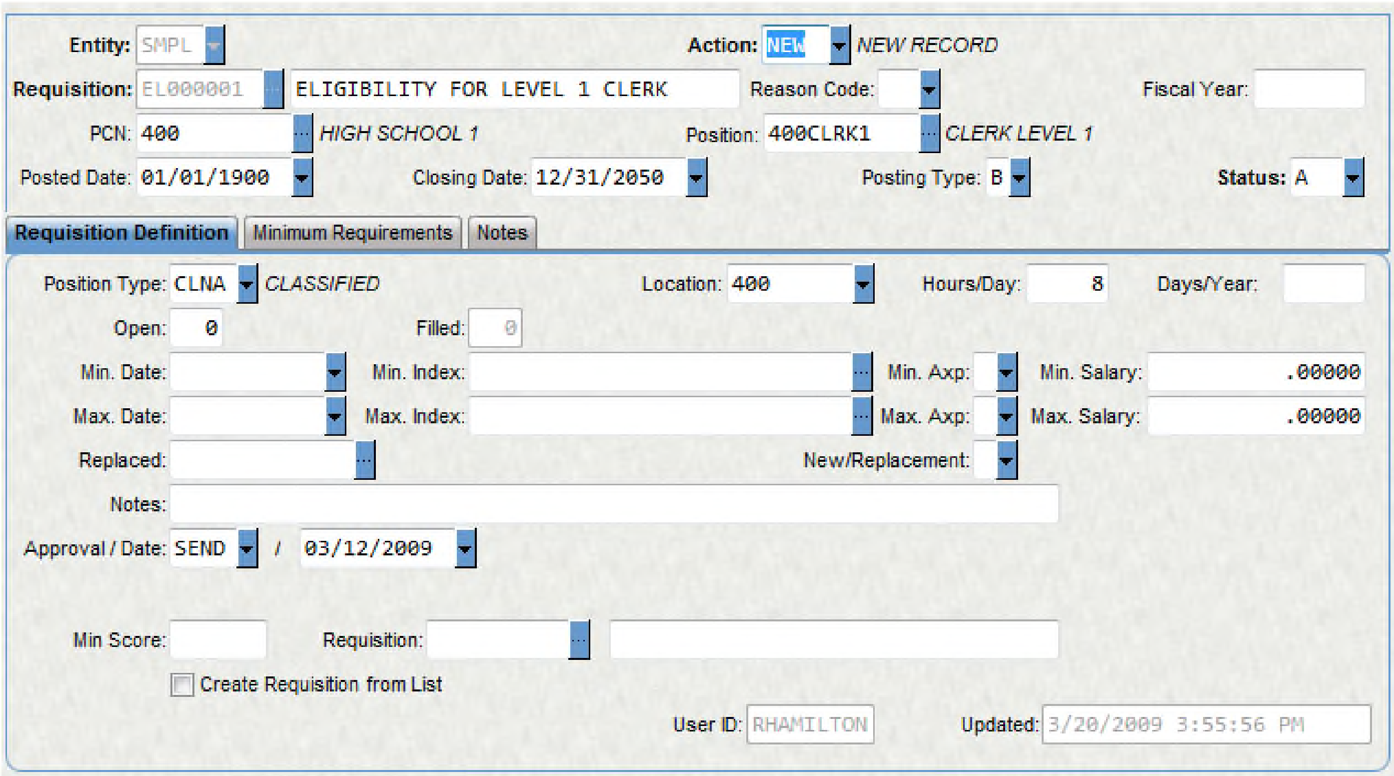
- Do you currently accept applications that are not tied to a specific job opening?
- If no, then there probably will be no need to create an eligibility list.
- If yes, do you see the need to create eligibility lists in the system?
- If yes, then what types of categories do you assign applicants to when there is no job opening (i.e. clerical, administrative, technical, etc.)? These will become the basis for your eligibility list #s.

b. Setup

- Access HRAPRD – Requisition Definition

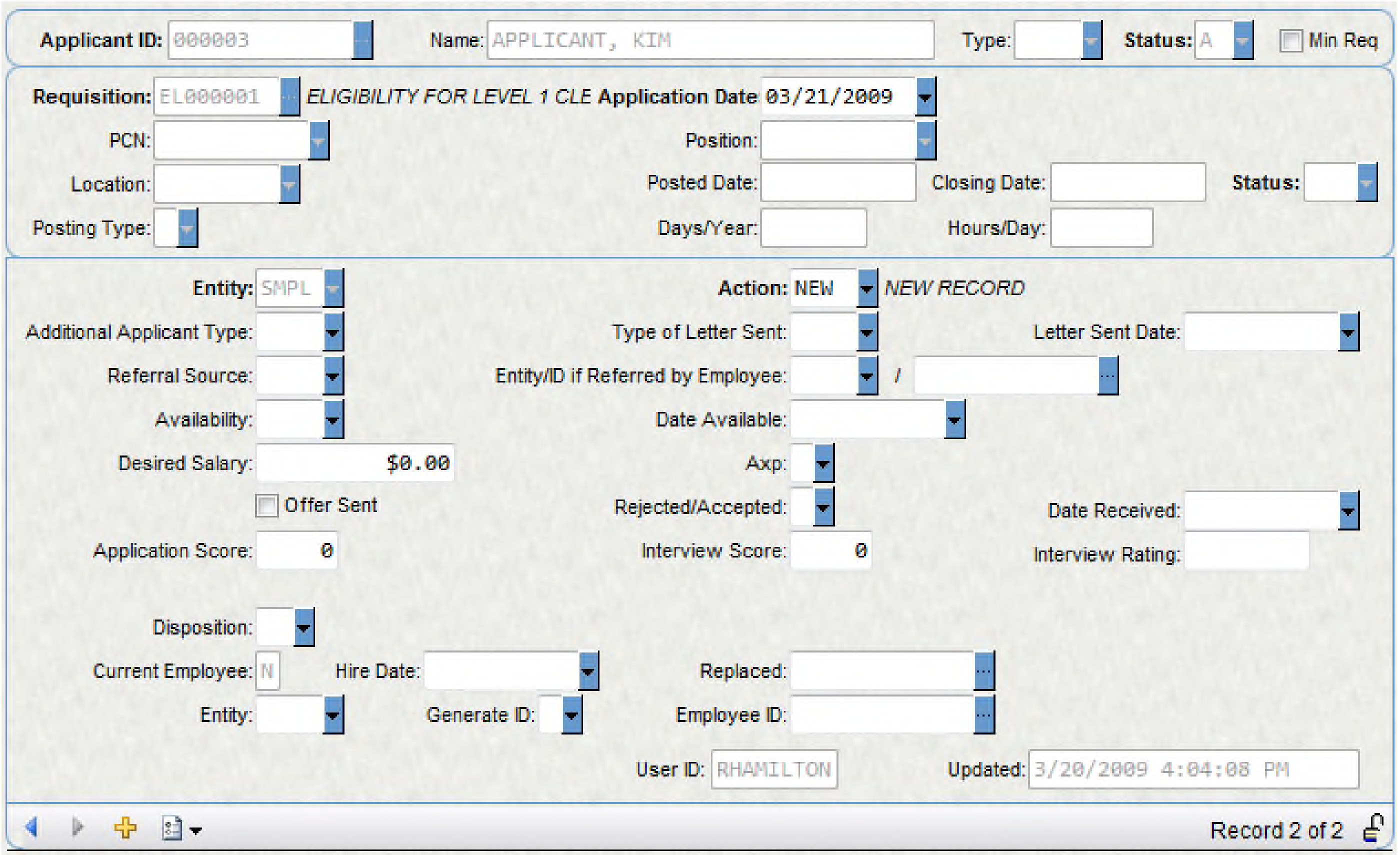
Required Entries included the **Entity.** Enter **ELIG** for the **Requisition**, this will create a unique eligibility list number. Enter a description for this eligibility list. Set the **Status** to A – Active and the **Approval** code to SEND.

Enter all other optional fields. Typically very few other fields are entered for eligibility lists because the position, salary, etc are unknown until the time a position comes available.



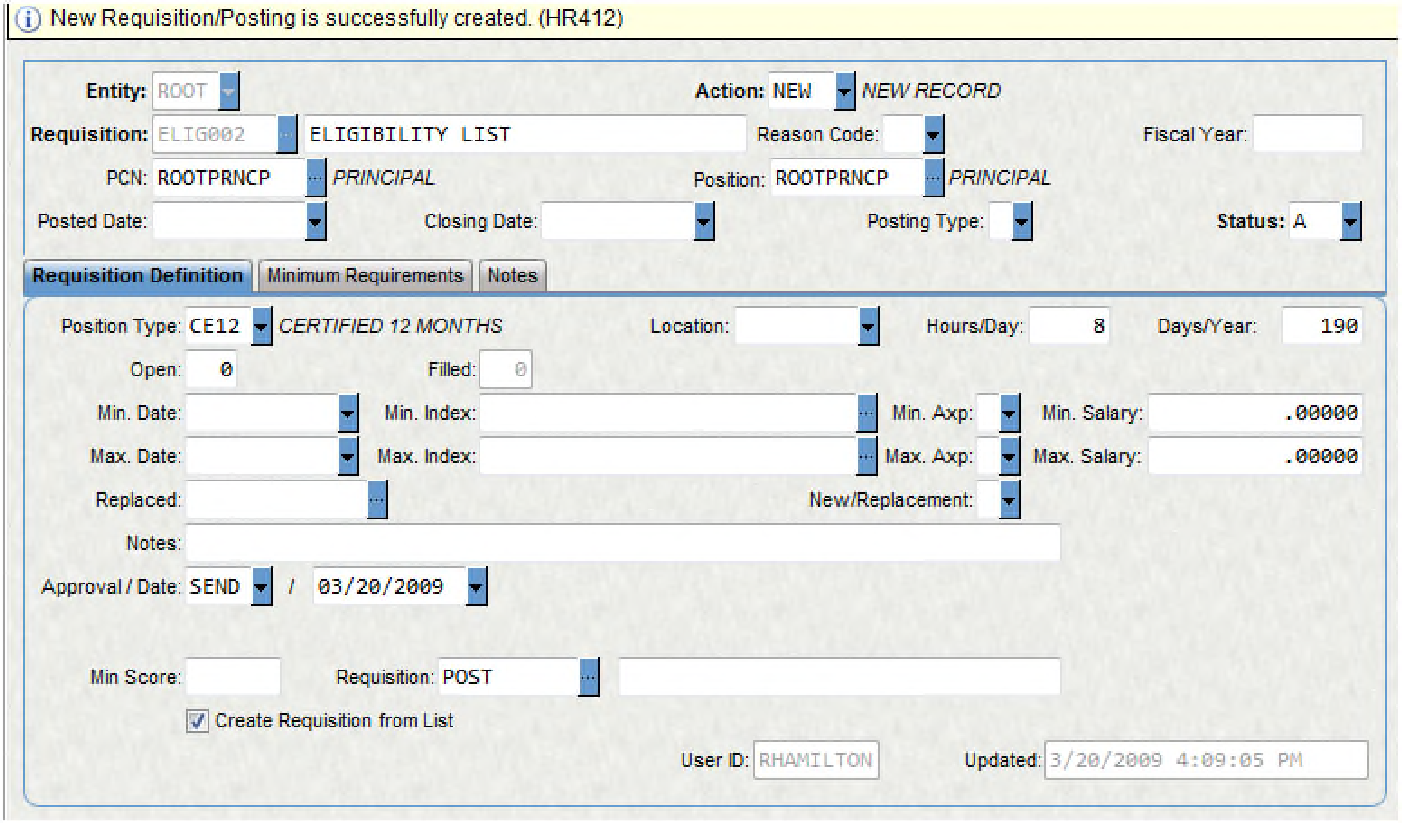
- Access HRAPPS – Posting Information

Enter all applicants associated with the eligibility list. Select the applicant from the entity list or navigate to the applicant, select '+' in the lower left corner to create another record. Select the lookup next to **Requisition** and select the Eligibility requisition that you just created. Enter the **Application Date** and the **Entity.** Hit **Enter** to save the new record.



- Access HRAPRD – Requisition Definition to assign all applicants on the created eligibility list to a new posting

  Find the eligibility list that you had created. **Check** Create Requisition from List. Enter POST in **Requisition** to create a new posting number along with a description for the posting. Hit **Enter** to save.



- Access HRAPPS – Posting Information to verify that all applicants on eligibility list now have the new posting number.

c. Steps for Processing an Application

1. HR creates posting requisition or eligibility list

HRAPRD	Requisition Definition

2. Applicants apply for the open position

Applicant Online	Public Pages

3. HR evaluates qualified applicants

Applicant Online	Internal Pages
HRAPAM	Applicant Master
HRAPAD	Applicant Information
HRAPEO	Applicant Demographic and EEO Information

4. HR hires an applicant by changing Disposition -> HI (Hired)

HRAPPS	Posting Information

When the applicant is hired, the information is updated in

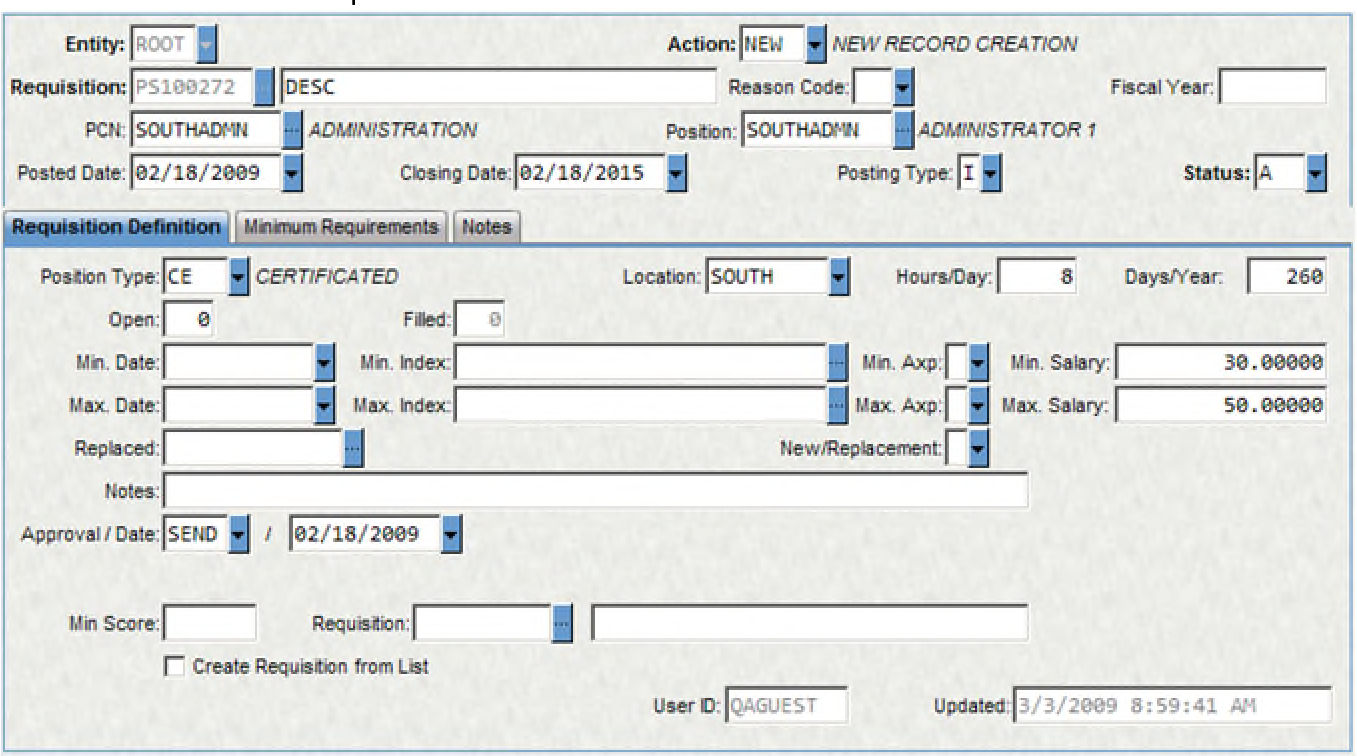
HREMEN	Employee Master
HREMES	Education & Skills

d. Internal Postings

1. Public postings are marked as either an E or B for external or both.

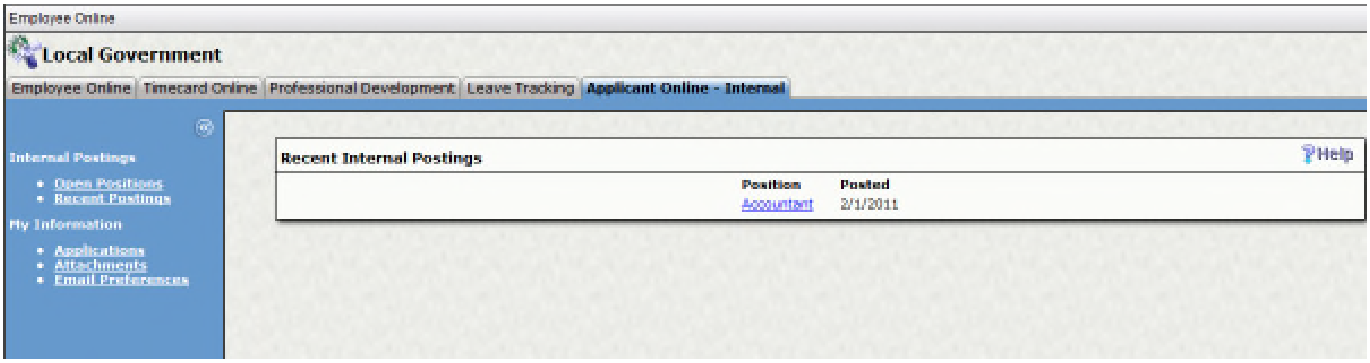
Position	Type	Posted	Closing
City Attorney	City Attorney	2/1/2009	2/1/2010
Maintenance I	Maintenance I		
Test	Test		
Qa Test	Qa Test	1/1/2008	12/31/2050
Administrator 1	Administrator 1	2/18/2009	2/18/2015
City Clerk	City Clerk	2/18/2009	2/18/2015
Paralegal	Paralegal	2/2/2009	2/2/2015
City Attorney	Entered By Smi	1/1/2002	1/1/2010

2. Mark the Requisition Definition as 'I' for Internal



   a. This will remove the posting from the public pages.

3. An employee can now log in through Employee Online to get to Applicant Online to view the Internal Postings


Employee Online
Local Government
Employee Online
Timecard Online
Professional Development
Leave Tracking
Applicant Online - Internal
Internal Postings
Open Positions
Recent Postings
My Information
Applications
Attachments
Email Preferences
Recent Internal Postings
Help
Position
Posted
Accountant
2/1/2011

Section 6: Timecard Online User Manual

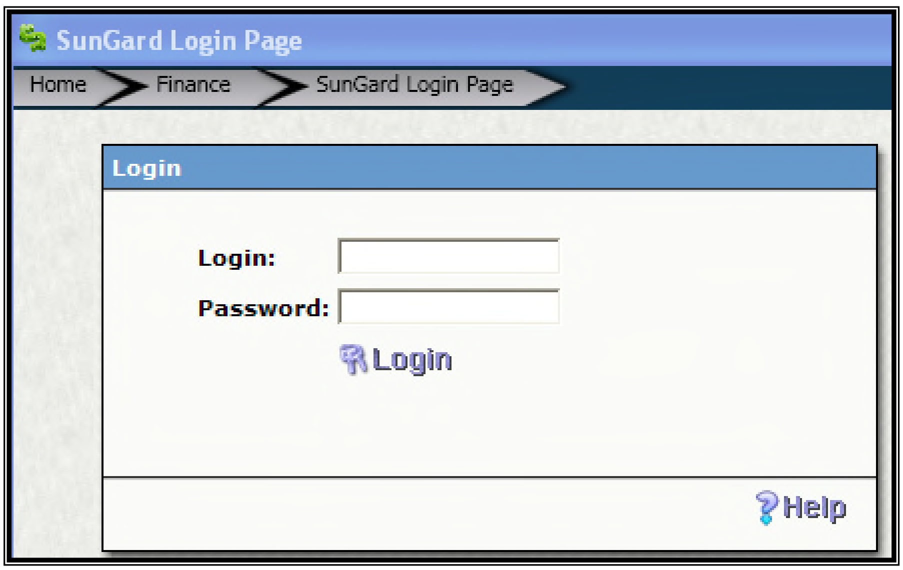
Purpose

Timecard Online is a web-based system that enables you, the timekeeper, to easily access your own timesheet as well as a group of timecards based upon your security. The interactive nature of Timecard Online enables end users to have better access to their timesheets, accrual balances and electronically submit time for payroll to process.

OVERVIEW

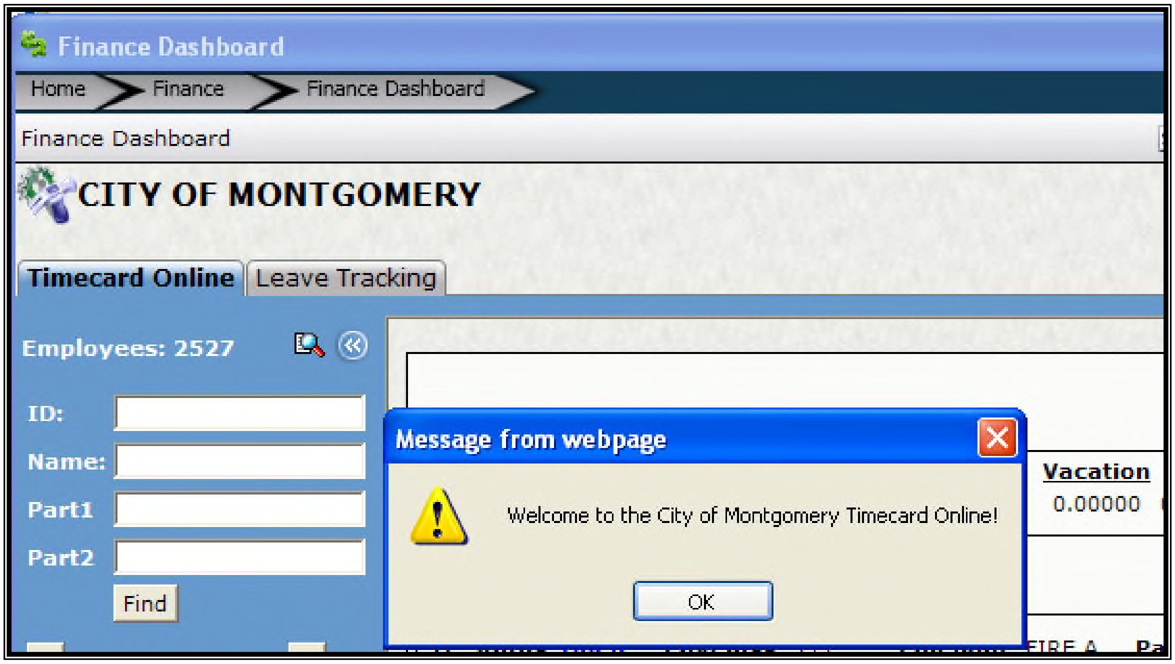
Access Timecard Online through a url given to you by your IT department.

You will be prompted with the following screen:



1. Enter your user name and password

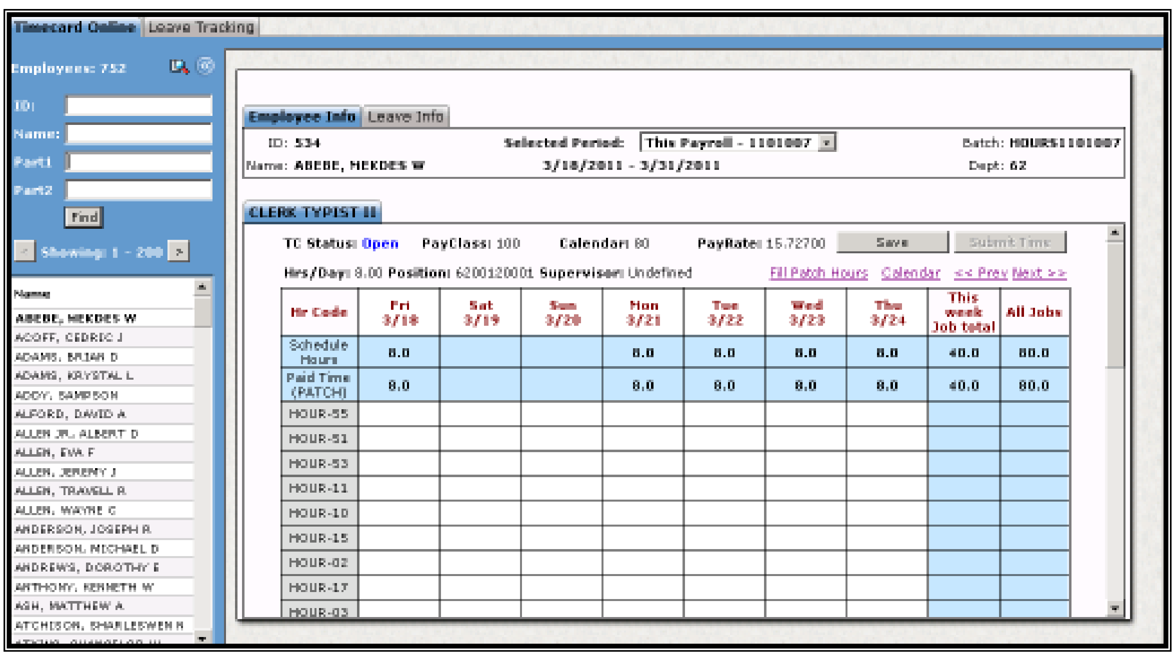
2. Select **Login**.



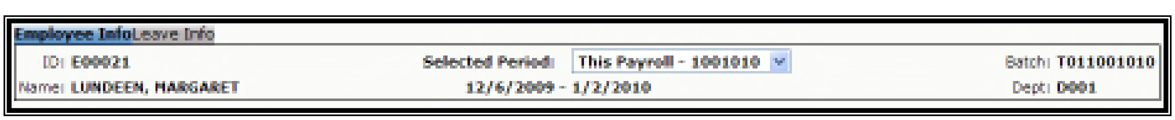
You are now logged into to your timesheet as well as a group of employee's timesheets that you have security to view.

This data is secure to you and Payroll.

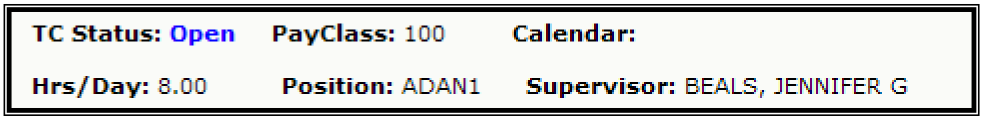
The first timesheet that opens when you log in as a "timekeeper" is your own.



The top section has the employee's ID, the active pay period (used in Payroll), the batch name which is also used for payroll, the employee's name, and dates of the pay period and the department of that employee.



The section below will have the employee's position, TC Status which refers to where the timecard is in approval process for the active pay period.



If you choose to use approval processes later on, there are four possible TC Statuses.

Open = Able to update the timecard

Submitted = Submitted, waiting for approval from the timecard approver

Rejected = Approver reject an entry on the timecard. Time will need to be modified and re submitted.

Approved = Time has been submitted and approved

For now, the will say OPEN since you are entering the time and Payroll is directly importing that time.

The **Pay Class** refers to the hours this employee is able to put time against. It's a grouping of accrual plans and hours subject to have time put against. Think of this as your Traditional and PTO groups.

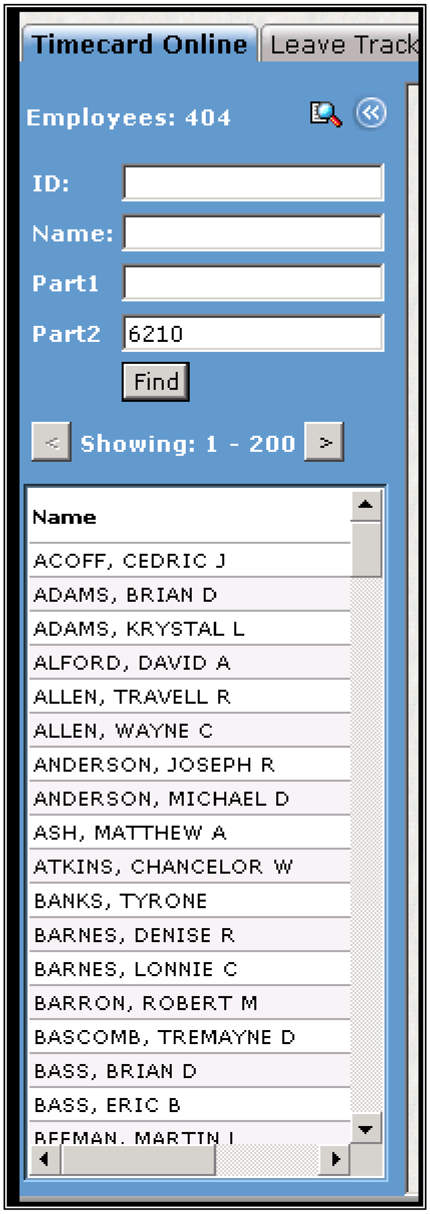
Hrs/Day refers to how many hours a day this position would be if it were full time.

Position is the employee's position within ONESolution.

As a Timekeeper, you will have a menu item on the left which holds all of the employee's timesheets that you have security to access.

You have the ability to scroll through the employee's names using the scroll bar in the menu as well as the ability to directly search for the employee using either their name (last name first), Employee ID, Part 1 = Department and Part 2 = Division.

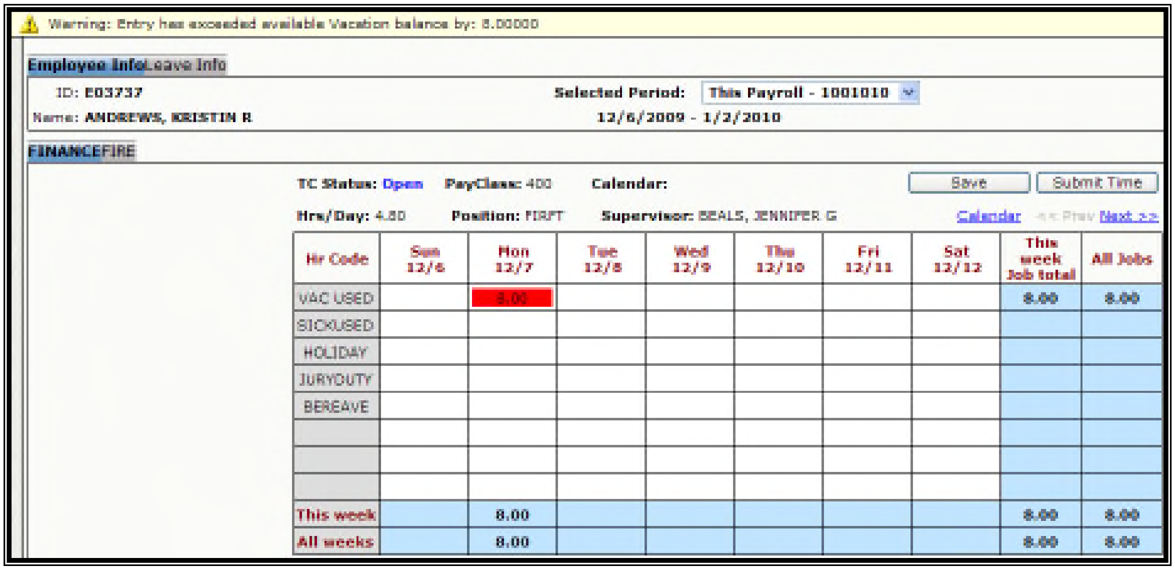
Hitting enter will filter to the employee's within the division that you entered.



You now have the ability to enter the time for this group of employees.

BALANCE CHECKING OVERVIEW:

When entering time, if the employee does not have the available balance to take a specific type of leave, the system will prompt with a block stating no available balance.



Warning: Entry has exceeded available Vacation balance by: 8.00000

Employee Info | Leave Info

ID: E03737 Selected Period: This Payroll - 1001010

Name: ANDREWS, KRISTIN R 12/6/2009 - 1/2/2010

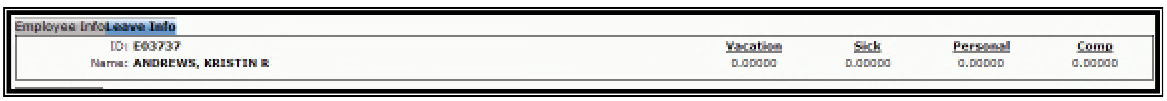
FINANCE | FIRE

TC Status: Open PayClass: 400 Calendar: Save Submit Time

Hrs/Day: 4.00 Position: FIRFT Supervisor: BEALS, JENNIFER G Calendar << Prev Next >>

Hr Code	Sun 12/6	Mon 12/7	Tue 12/8	Wed 12/9	Thu 12/10	Fri 12/11	Sat 12/12	This week Job total	All Jobs
VAC USED		8.00						8.00	8.00
SICKUSED									
HOLIDAY									
JURYDUTY									
BEREAVE									
This week		8.00						8.00	8.00
All weeks		8.00						8.00	8.00

To view the employee's available balance, select the Leave Info tab. The hours shown are the employee's available hours to take per specified leave as of the last payroll.



Employee Info | Leave Info

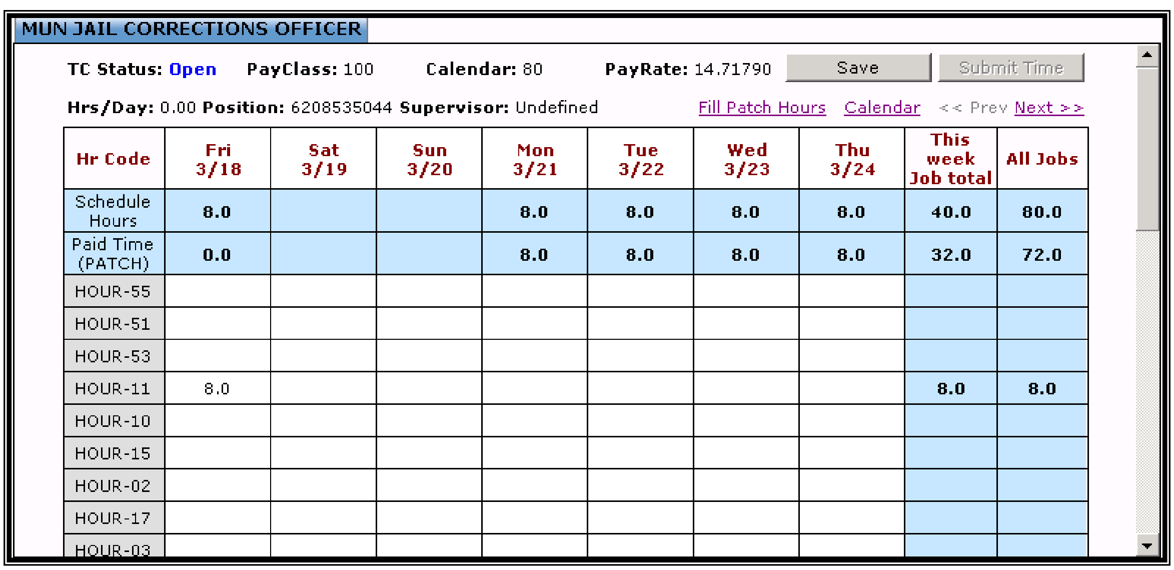
ID: E03737

Name: ANDREWS, KRISTIN R

Vacation	Sick	Personal	Comp
0.00000	0.00000	0.00000	0.00000

ENTERING TIME:

1. Select the day you want to enter the time for. Click in the box on the day and the hour code and enter the appropriate time. If it is an exception hour, you will notice the patched hours will reduce to the correct number of hours. If it is an additional hours, the patch will stay the same and the total on the bottom will increase.



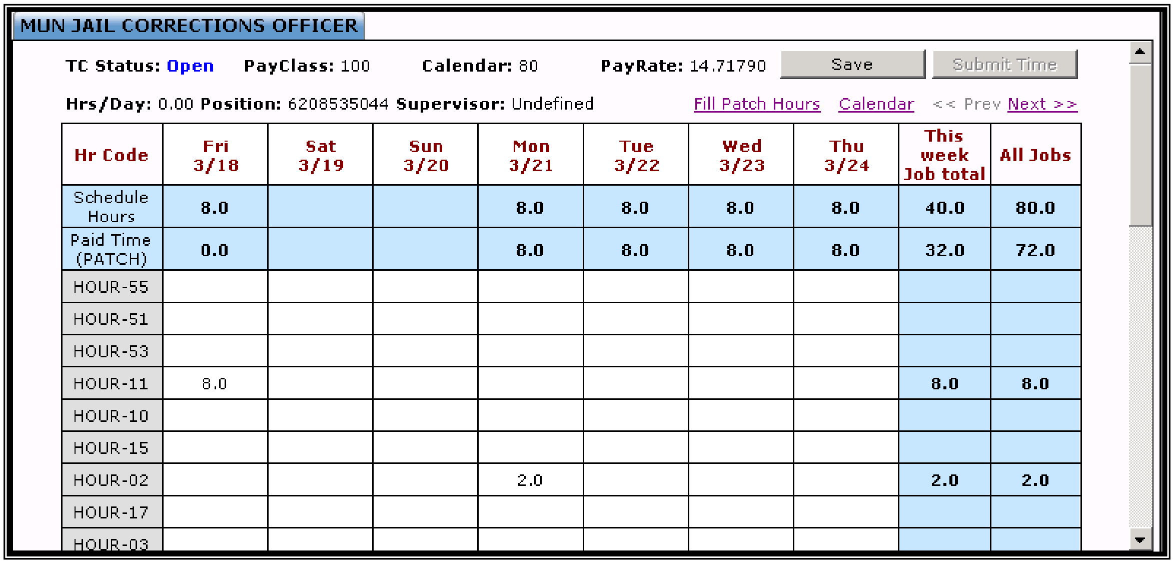
MUN JAIL CORRECTIONS OFFICER

TC Status: Open PayClass: 100 Calendar: 80 PayRate: 14.71790 Save Submit Time

Hrs/Day: 0.00 Position: 6208535044 Supervisor: Undefined Fill Patch Hours Calendar << Prev Next >>

Hr Code	Fri 3/18	Sat 3/19	Sun 3/20	Mon 3/21	Tue 3/22	Wed 3/23	Thu 3/24	This week Job total	All Jobs
Schedule Hours	8.0			8.0	8.0	8.0	8.0	40.0	80.0
Paid Time (PATCH)	0.0			8.0	8.0	8.0	8.0	32.0	72.0
HOUR-55									
HOUR-51									
HOUR-53									
HOUR-11	8.0							8.0	8.0
HOUR-10									
HOUR-15									
HOUR-02									
HOUR-17									
HOUR-03									

2. Continue with the first week of time you are entering.



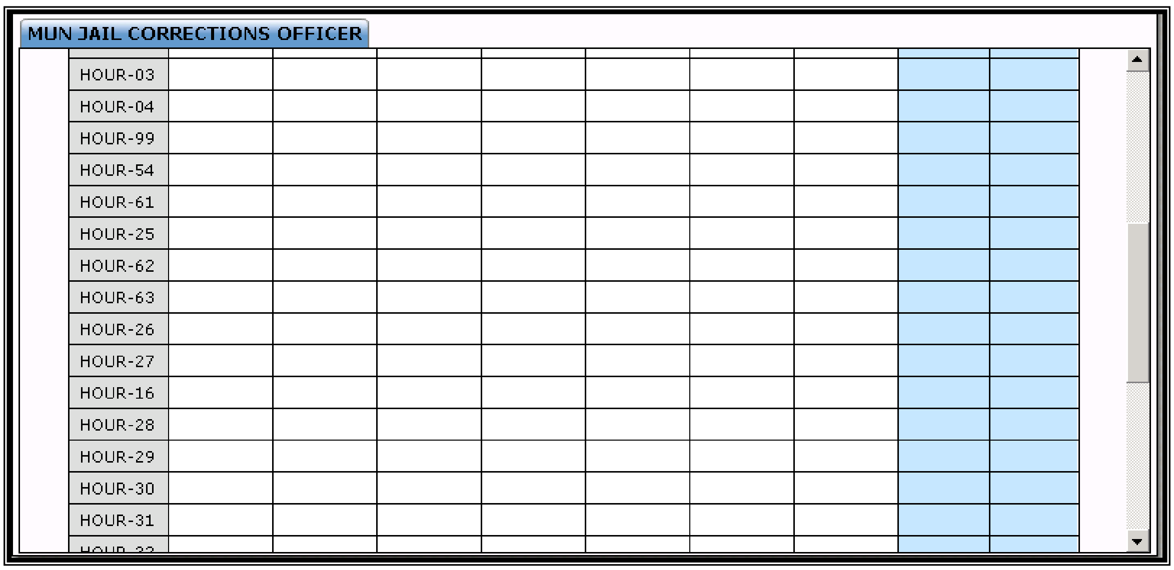
MUN JAIL CORRECTIONS OFFICER

TC Status: Open PayClass: 100 Calendar: 80 PayRate: 14.71790 Save Submit Time

Hrs/Day: 0.00 Position: 6208535044 Supervisor: Undefined Fill Patch Hours Calendar << Prev Next >>

Hr Code	Fri 3/18	Sat 3/19	Sun 3/20	Mon 3/21	Tue 3/22	Wed 3/23	Thu 3/24	This week Job total	All Jobs
Schedule Hours	8.0			8.0	8.0	8.0	8.0	40.0	80.0
Paid Time (PATCH)	0.0			8.0	8.0	8.0	8.0	32.0	72.0
HOUR-55									
HOUR-51									
HOUR-53									
HOUR-11	8.0							8.0	8.0
HOUR-10									
HOUR-15									
HOUR-02				2.0				2.0	2.0
HOUR-17									
HOUR-03									

3. Due to the large number of hour codes available, you may have to scroll down to get to the rest of the codes.

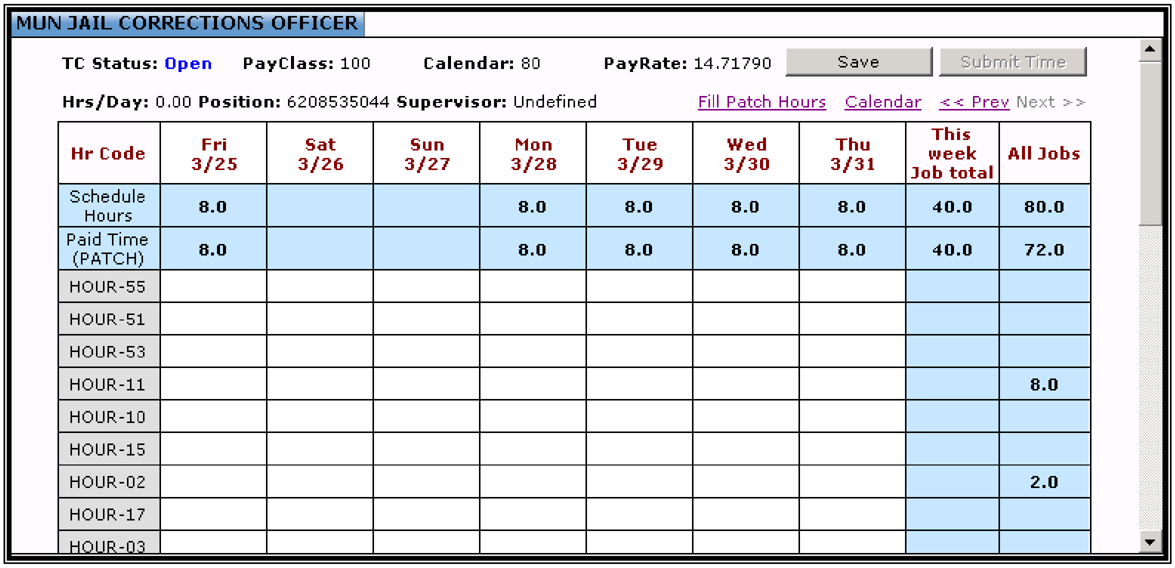


MUN JAIL CORRECTIONS OFFICER

HOUR-03									
HOUR-04									
HOUR-99									
HOUR-54									
HOUR-61									
HOUR-25									
HOUR-62									
HOUR-63									
HOUR-26									
HOUR-27									
HOUR-16									
HOUR-28									
HOUR-29									
HOUR-30									
HOUR-31									

4. Once the first week is completed, select the Next >>

This will take you to the second week in the pay period. Notice that the time you entered in the first week will show as totals in the second week.



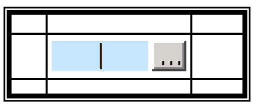
MUN JAIL CORRECTIONS OFFICER

TC Status: Open PayClass: 100 Calendar: 80 PayRate: 14.71790 Save Submit Time

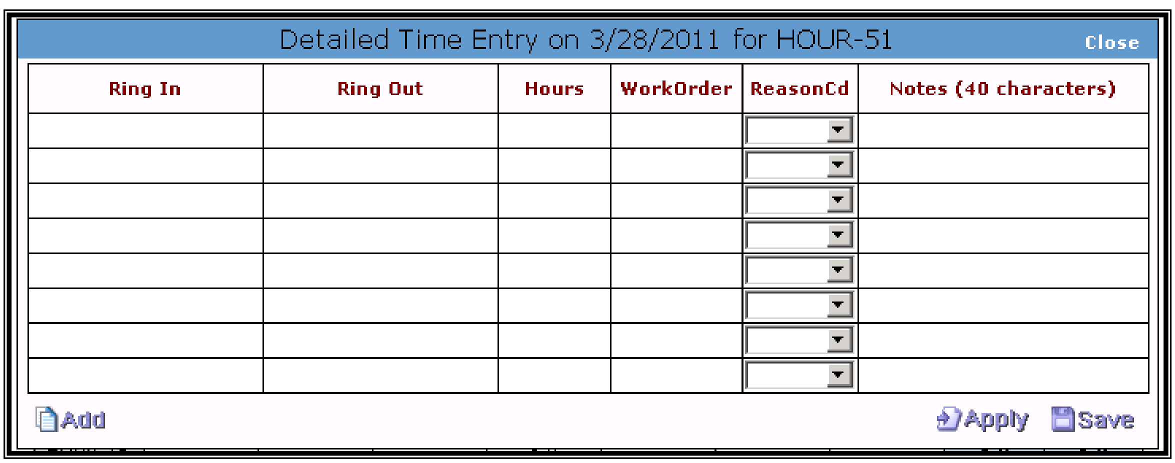
Hrs/Day: 0.00 Position: 6208535044 Supervisor: Undefined Fill Patch Hours Calendar << Prev Next >>

Hr Code	Fri 3/25	Sat 3/26	Sun 3/27	Mon 3/28	Tue 3/29	Wed 3/30	Thu 3/31	This week Job total	All Jobs
Schedule Hours	8.0			8.0	8.0	8.0	8.0	40.0	80.0
Paid Time (PATCH)	8.0			8.0	8.0	8.0	8.0	40.0	72.0
HOUR-55									
HOUR-51									
HOUR-53									
HOUR-11									8.0
HOUR-10									
HOUR-15									
HOUR-02									2.0
HOUR-17									
HOUR-03									

If your department needs more information that the standard hours entered, you may select the detail panel on the day and hour code needed.



The … will open up a detail screen.



Detailed Time Entry on 3/28/2011 for HOUR-51 Close

Ring In	Ring Out	Hours	WorkOrder	ReasonCd	Notes (40 characters)

Add Apply Save

Here you may enter ring in and ring out time or a lump sum of hours and a reason for these hours.

Detailed Time Entry on 3/28/2011 for HOUR-51 Close

Ring In	Ring Out	Hours	WorkOrder	ReasonCd	Notes (40 characters)
		8		1	

Add Apply Save

Hit Save to return to the time sheet or select close to cancel this entry.

1. Enter the time as needed for the second week and select **Save.**

MUN JAIL CORRECTIONS OFFICER

TC Status: Open **PayClass:** 100 **Calendar:** 80 **PayRate:** 14.71790 Save Submit Time

Hrs/Day: 0.00 **Position:** 6208535044 **Supervisor:** Undefined Fill Patch Hours Calendar << Prev Next >>

Hr Code	Fri 3/25	Sat 3/26	Sun 3/27	Mon 3/28	Tue 3/29	Wed 3/30	Thu 3/31	This week Job total	All Jobs
Schedule Hours	8.0			8.0	8.0	8.0	8.0	40.0	80.0
Paid Time (PATCH)	8.0			0.0	8.0	8.0	8.0	32.0	64.0
HOUR-55									
HOUR-51									
HOUR-53									
HOUR-11									8.0
HOUR-10									
HOUR-15				8.0				8.0	8.0
HOUR-02						2.0		2.0	4.0
HOUR-17									
HOUR-03									

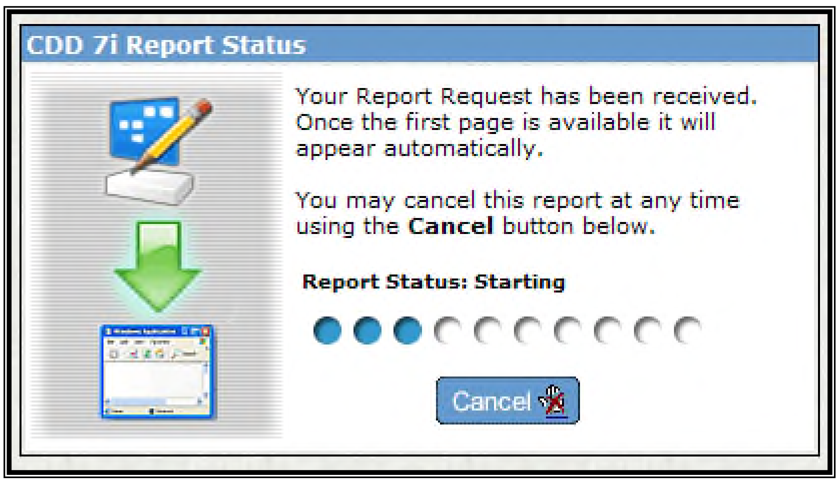
2. Scroll to the very bottom of the timesheet to verify that your hours are in balance.

This week	8.0			8.0	8.0	10.0	8.0	42.0	42.0
All weeks	16.0			18.0	16.0	18.0	16.0	84.0	84.0

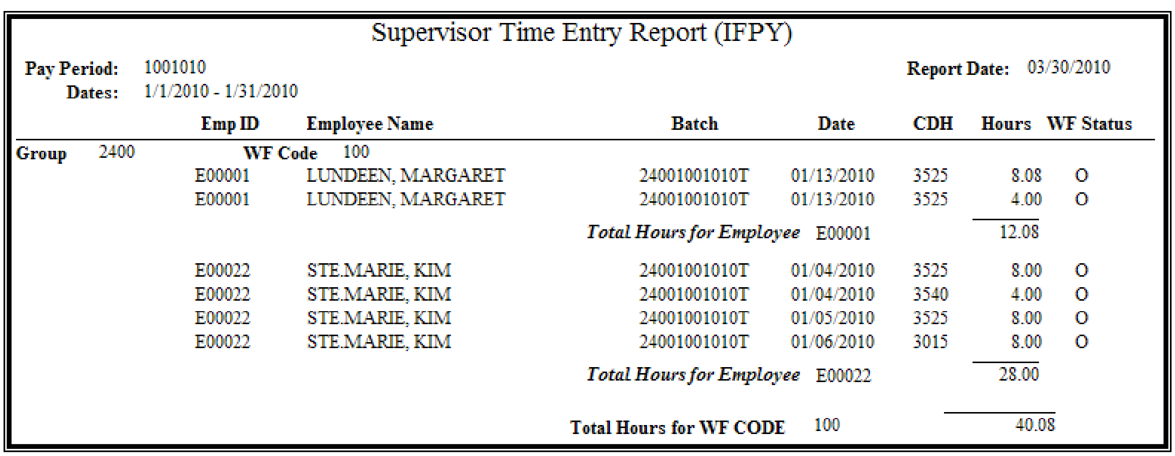
3. My balance is 84 because I had entered exception hours that reduced my regular hours back to 80 and I also entered 4 hours of overtime.
4. Once you have completed time for one employee, select the next employee from your list of employees and repeat until all time has been entered. To get the entire list of names to appear again, remove the employee's name or ID (search criteria) and hit enter. This will populate the menu with all employees in your timekeeping group.
5. Once you have completed entering all time for your employee's, you may run your balance report or some additional time entry reports.
6. Select Supervisor Report from your dashboard (we will need to have this part of their dashboard setup)

7. Enter the pay period that you are working with (this is the value at the top of the employee's timecard)

8. Select **Submit**



9. Once the report is complete, you will get a list of all of your employee's timecards for that pay period.



Supervisor Time Entry Report (IFPY)

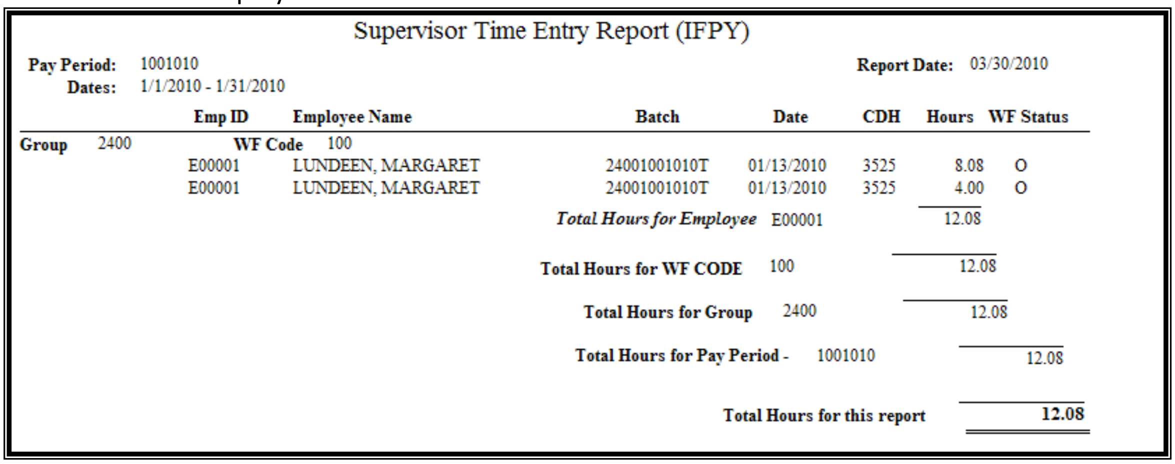
Pay Period: 1001010 **Report Date:** 03/30/2010
Dates: 1/1/2010 - 1/31/2010

	Emp ID	Employee Name	Batch	Date	CDH	Hours	WF Status
Group 2400	WF Code 100						
	E00001	LUNDEEN, MARGARET	24001001010T	01/13/2010	3525	8.08	O
	E00001	LUNDEEN, MARGARET	24001001010T	01/13/2010	3525	4.00	O
			Total Hours for Employee	E00001		12.08	
	E00022	STE.MARIE, KIM	24001001010T	01/04/2010	3525	8.00	O
	E00022	STE.MARIE, KIM	24001001010T	01/04/2010	3540	4.00	O
	E00022	STE.MARIE, KIM	24001001010T	01/05/2010	3525	8.00	O
	E00022	STE.MARIE, KIM	24001001010T	01/06/2010	3015	8.00	O
			Total Hours for Employee	E00022		28.00	
			Total Hours for WF CODE	100		40.08	

10. The report will also show you the date and hours the employee has entered on their timesheet.

11. To run this report for a specific person, enter the pay period and then enter either their name or ID number.

12. If you choose to use the name criteria, enter the last name and a * if you are not sure what the legal name is of the employee.



Supervisor Time Entry Report (IFPY)

Pay Period: 1001010 **Report Date:** 03/30/2010
Dates: 1/1/2010 - 1/31/2010

		Emp ID	Employee Name	Batch	Date	CDH	Hours	WF Status
Group	2400	**WF Code** 100						
		E00001	LUNDEEN, MARGARET	24001001010T	01/13/2010	3525	8.08	O
		E00001	LUNDEEN, MARGARET	24001001010T	01/13/2010	3525	4.00	O

Total Hours for Employee E00001 12.08

Total Hours for WF CODE 100 12.08

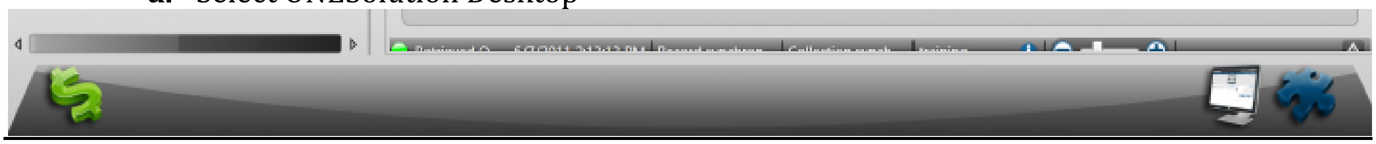
Total Hours for Group 2400 12.08

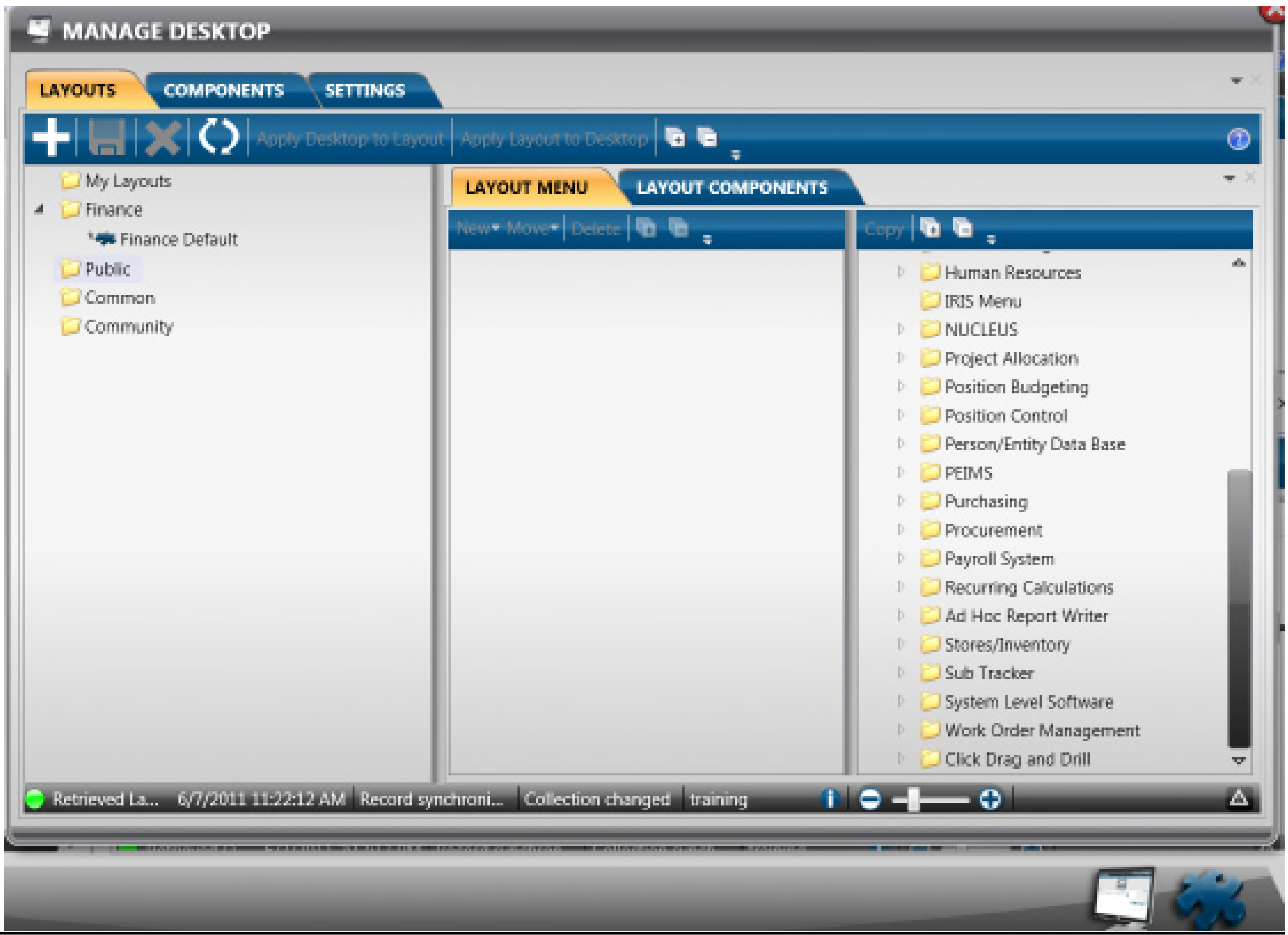
Total Hours for Pay Period - 1001010 12.08

Total Hours for this report **12.08**

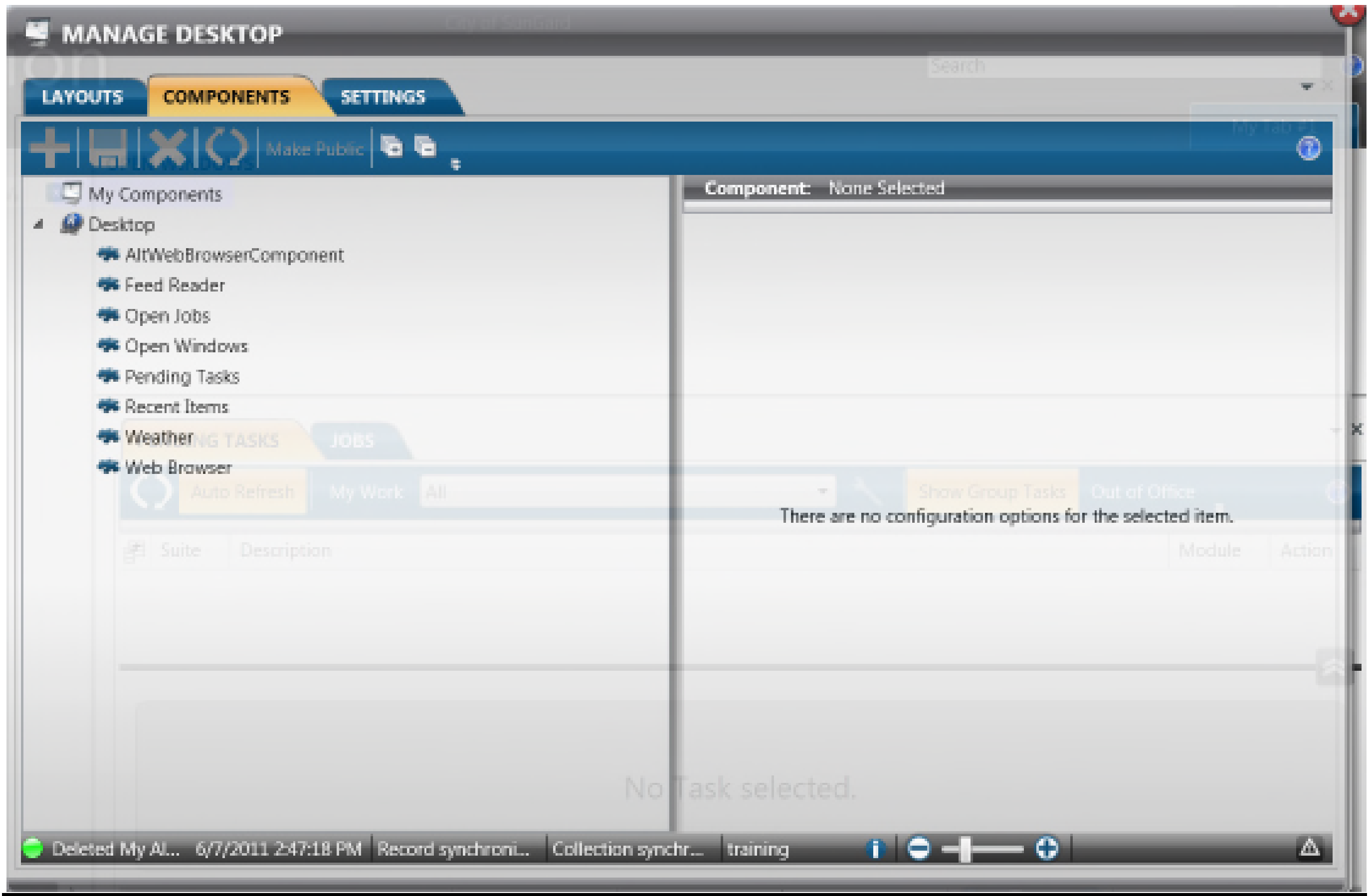
Section 7: Timecard Online Set Up

1. **Setup a new Public Folder for Timecard Online**
    a. Select ONESolution Desktop





    b. Select the Components tab

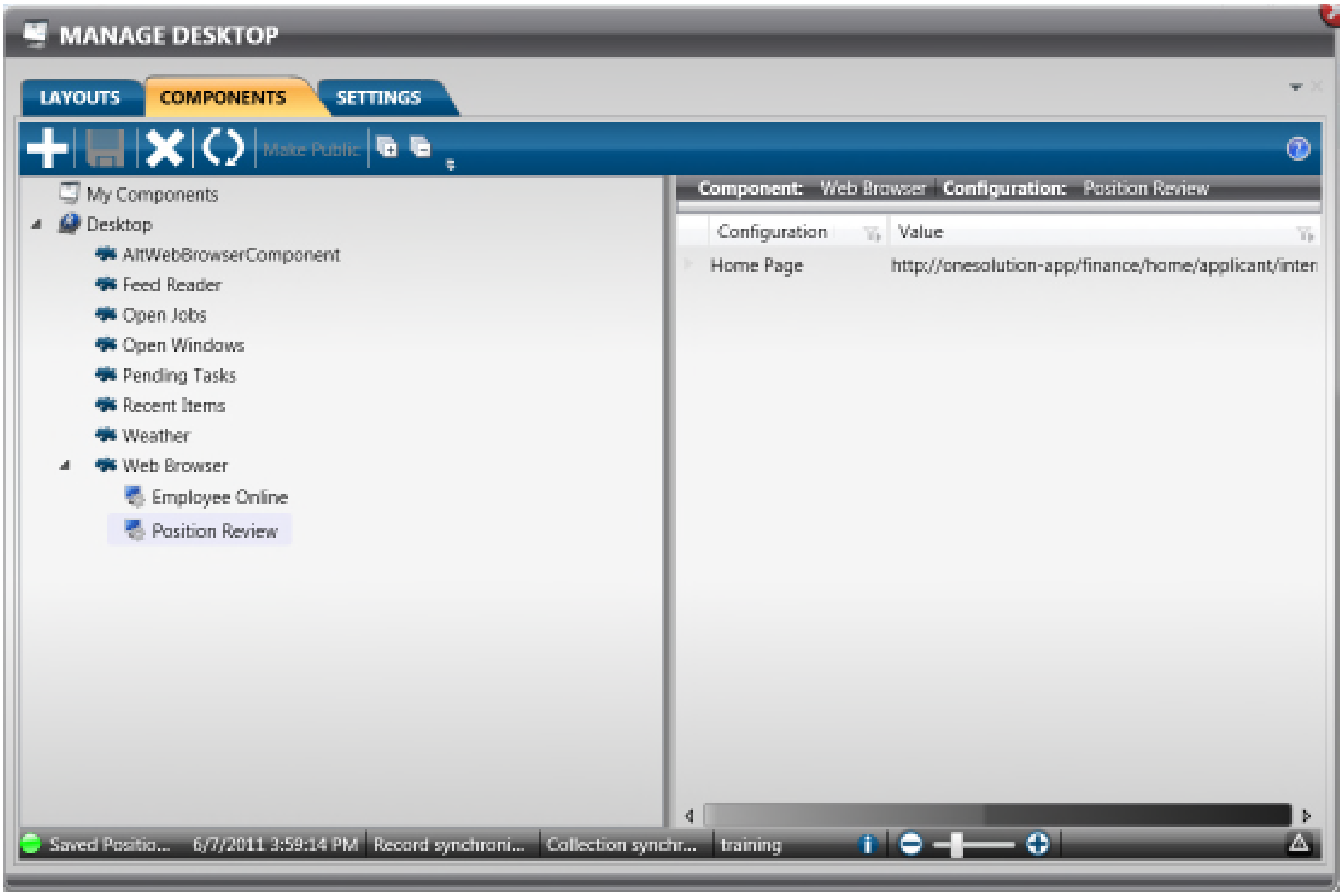


c. Select Web Browser

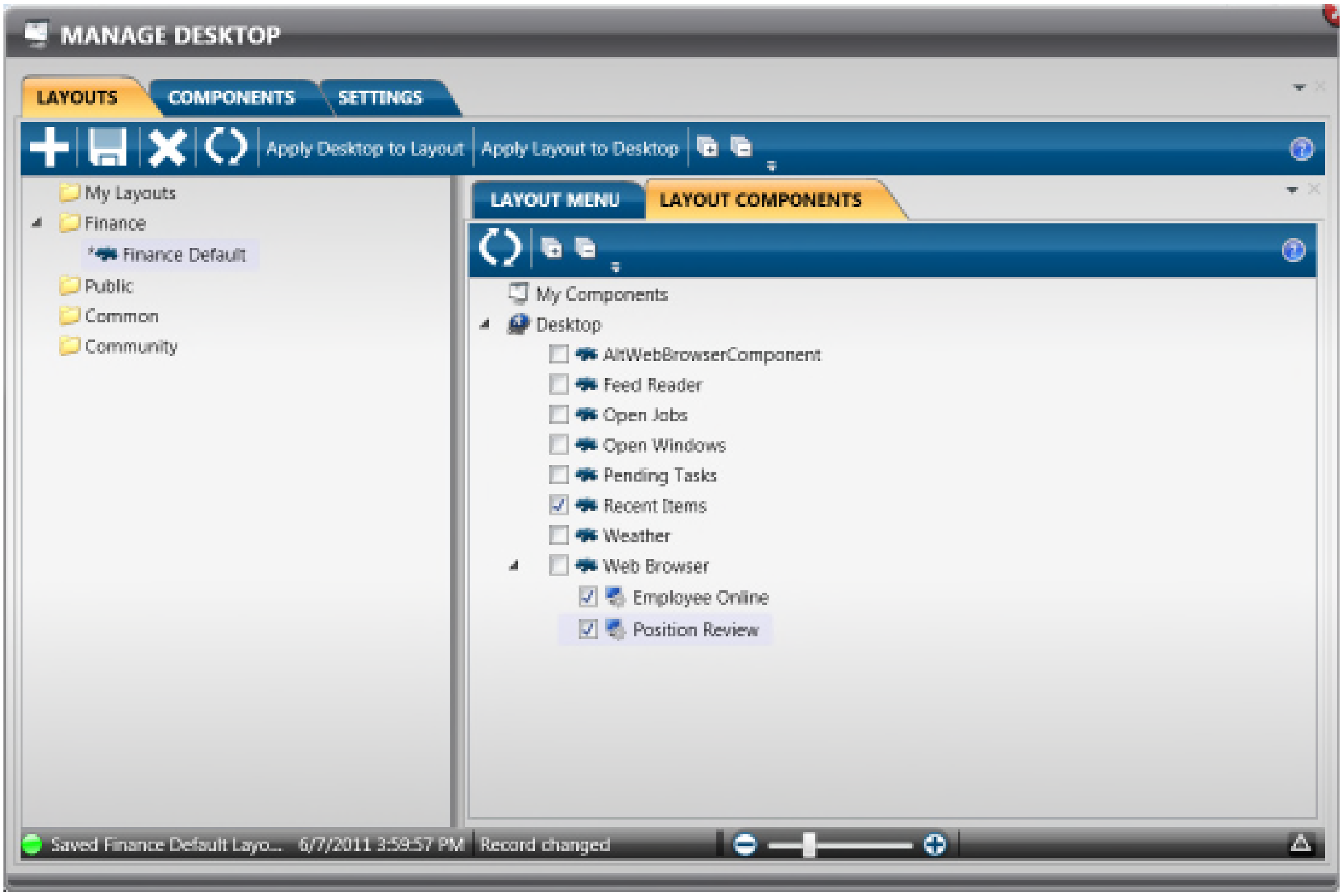
d. Select the + Add option

  i. You'll now notice under My Components, an additional Web Browser
  ii. To the right, you'll notice a default of a google url.
  iii. Click in the value field and change this to:
    1. http://servername/finance/timecard

2. Select the Floppy Disk to Save your URL
3. Select Make Public, this will move the link from My Components to Desktop
4. Double Click your new Browser and change the title to Timecard
5. Select Save to finalize



6. Select the Layouts tab
7. Select Layout Components
8. Put a check in Timecard
9. Select Save
10. Select Apply Layout to Desktop



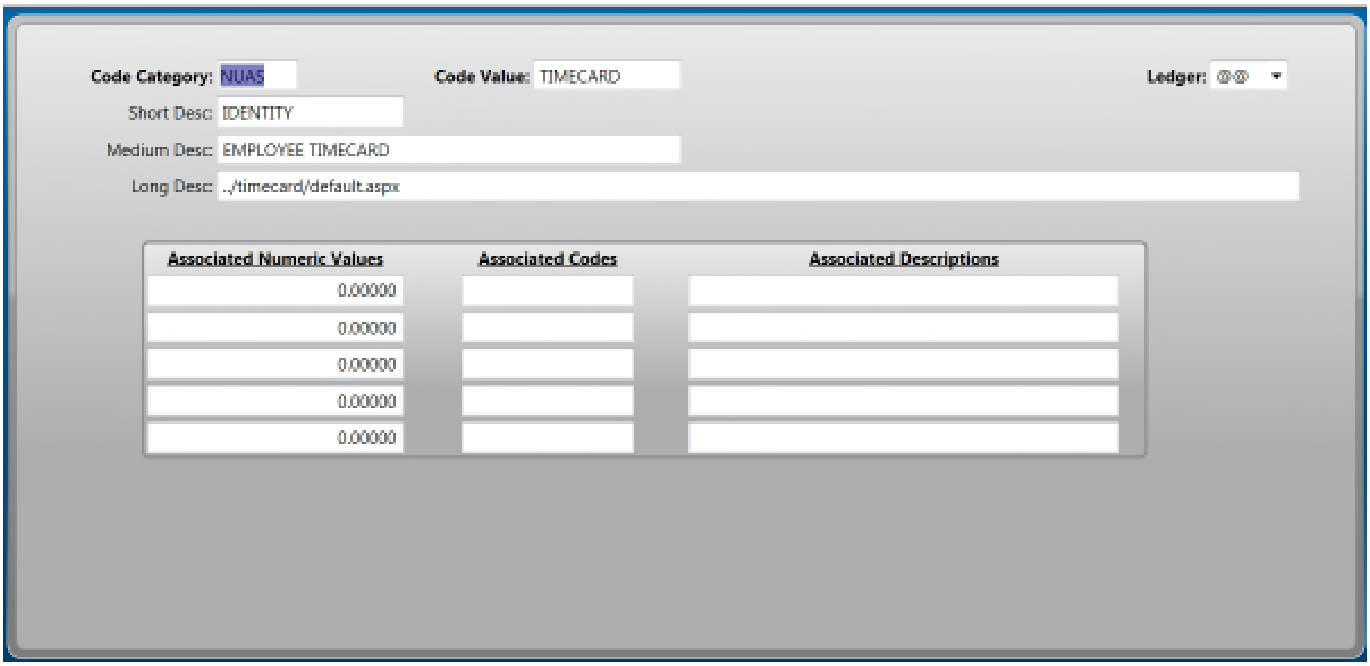
11. Security Set Up

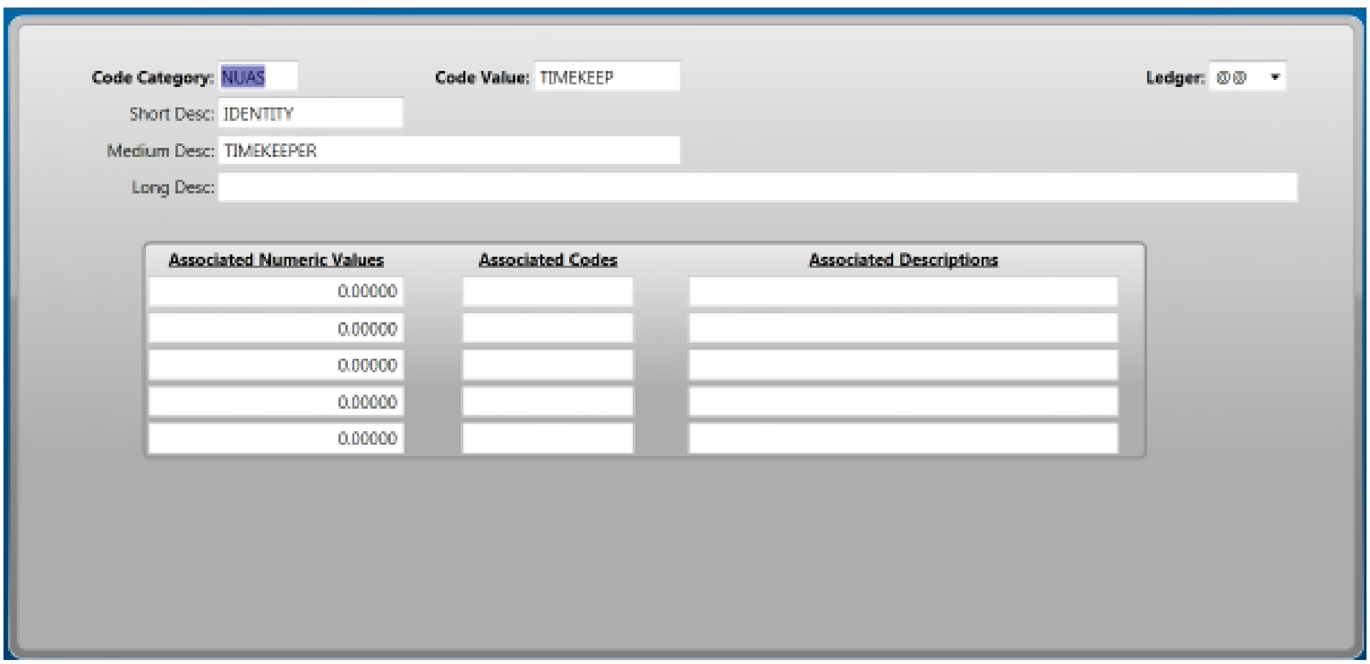
Common Codes

The following common codes are required to set up employees and timekeepers with the appropriate associations for security.

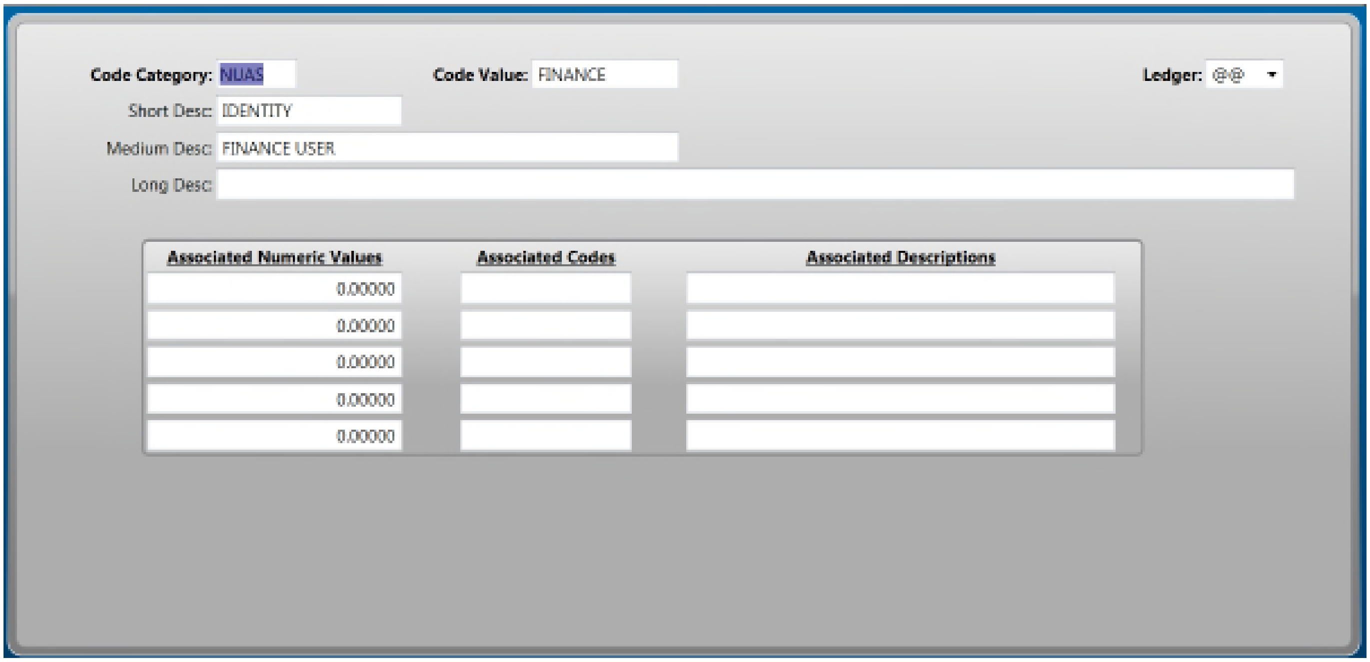
Timekeepers must be set up in the SPSOne console with a security role and the TIMEKEEP association.

Employees should be set up in NUUPPU, Portal Users with TIMECARD association.



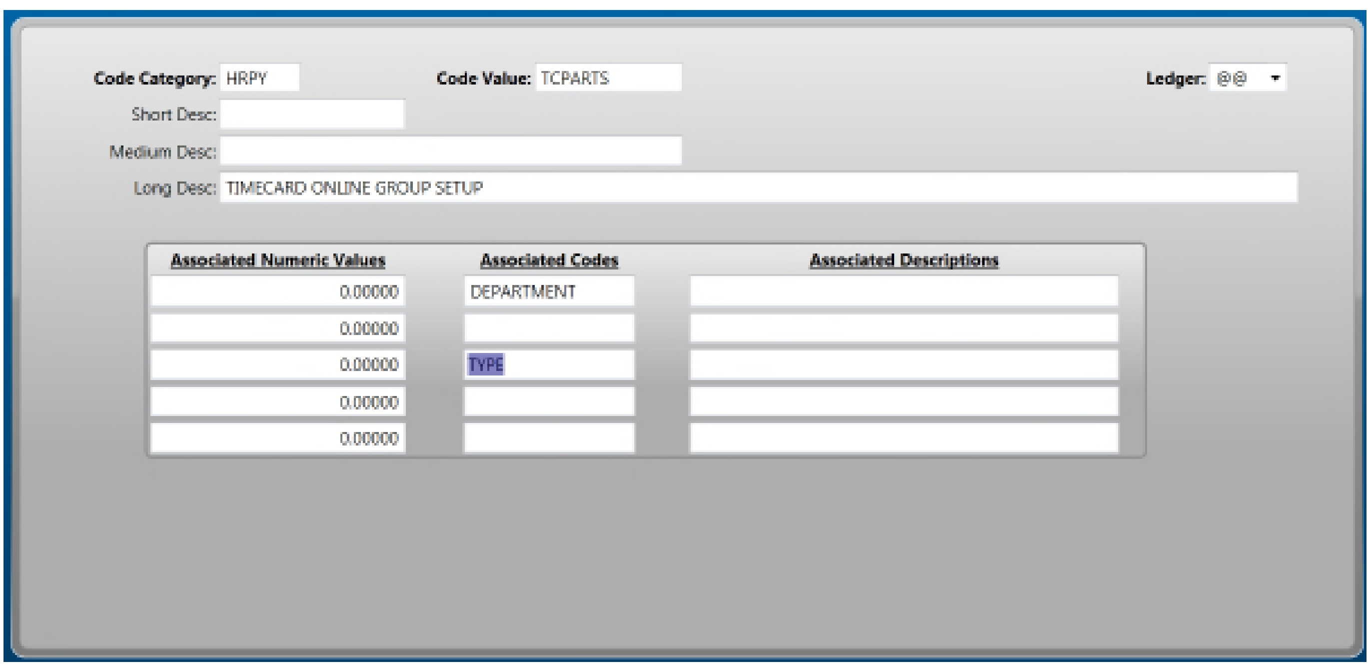


If an employee is a Finance user in the SPSOne console and they will also be a TIMEKEEPER, the following common code is created and must be assigned to the employee so they don't not lose access to ONESolution. By default, when an employee is set up in SPSOne and does not have any associations, by default, they have access to ONESolution. Once they are given an association, that default no longer stands true and FINANCE must also be assigned.



12. DEFINE THE TIMECARD GROUPS

Timecard Group definition is defined in common code (**NUUPCD**) with **Code Category** = **HRPY** and **Code Value** = **TCPARTS**



Associated Code (1) and **Associated Code (2)** are used for **PART1** (primary timekeeping group)

Associated Code (3) and **Associated Code (4)** are used for **PART2** (sub-group)

In the example above:

PART1 = **DEPARTMENT**

PART2 = **TYPE**

You may concatenate two attributes for each PART. You may also substring each attribute by putting (for example) **1,4** in the **Associated Description**. The value **1,4** means start in position 1 for a length of 4 characters.

In the example below, **PART1** = **Employee Type** & **first 4 characters of Department** and **PART2** = **Education Code 1**

Associated Code (1) = **TYPE**

Associated Code (1) = **DEPARTMENT 1,4**

Associated Code (1) = **EDUC_CD01**

Associated Code (1) = **blank**

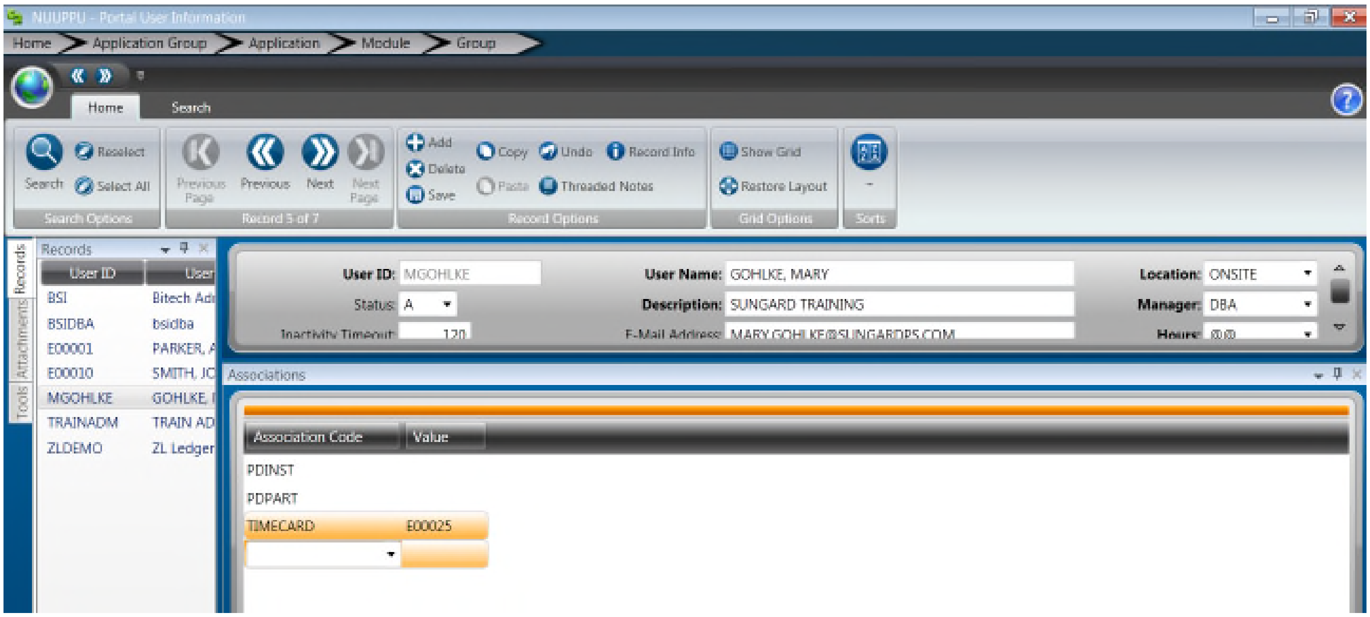
The following list of attributes may be used for **PART1** and/or **PART2**

Attribute	Description
TYPE	Employee type
BARGUNIT	Bargaining Unit
DEPARTMENT	Department
ENTITY_ID	Entity
STAT	PY Status
HR_STATUS	HR Status
CALENDAR	Pay Calendar
CKDIST	Check Distribution
CYCLE	Pay cycle
WORKSITE	Location
DIVISION	Division
EDUC_CD01	Education Code 1
EDUC_CD02	Education Code 2
SKILL_CD05	Skill code 5
SEL_CD02	Selection code 2
MISC_CD01	Miscellaneous code 1
SUPERID	Supervisor ID (from PCNTBLE via primary pay assignment)
HR1 ➔ HR28	Misc 1 – 28

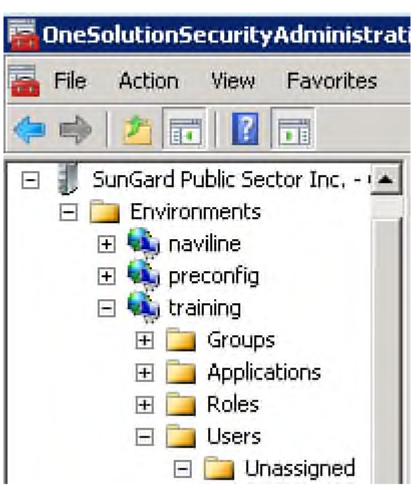
13. User Definition

User Security is setup in the SPSOne Console for TIMEKEEPERs and NUUPPS for TIMECARD employees

1. Access NUUPPU from ONESolution (If employee only and has no other function in OS)
2. Select TIMECARD for the Association Code.
3. Enter the employee ID number in Value.



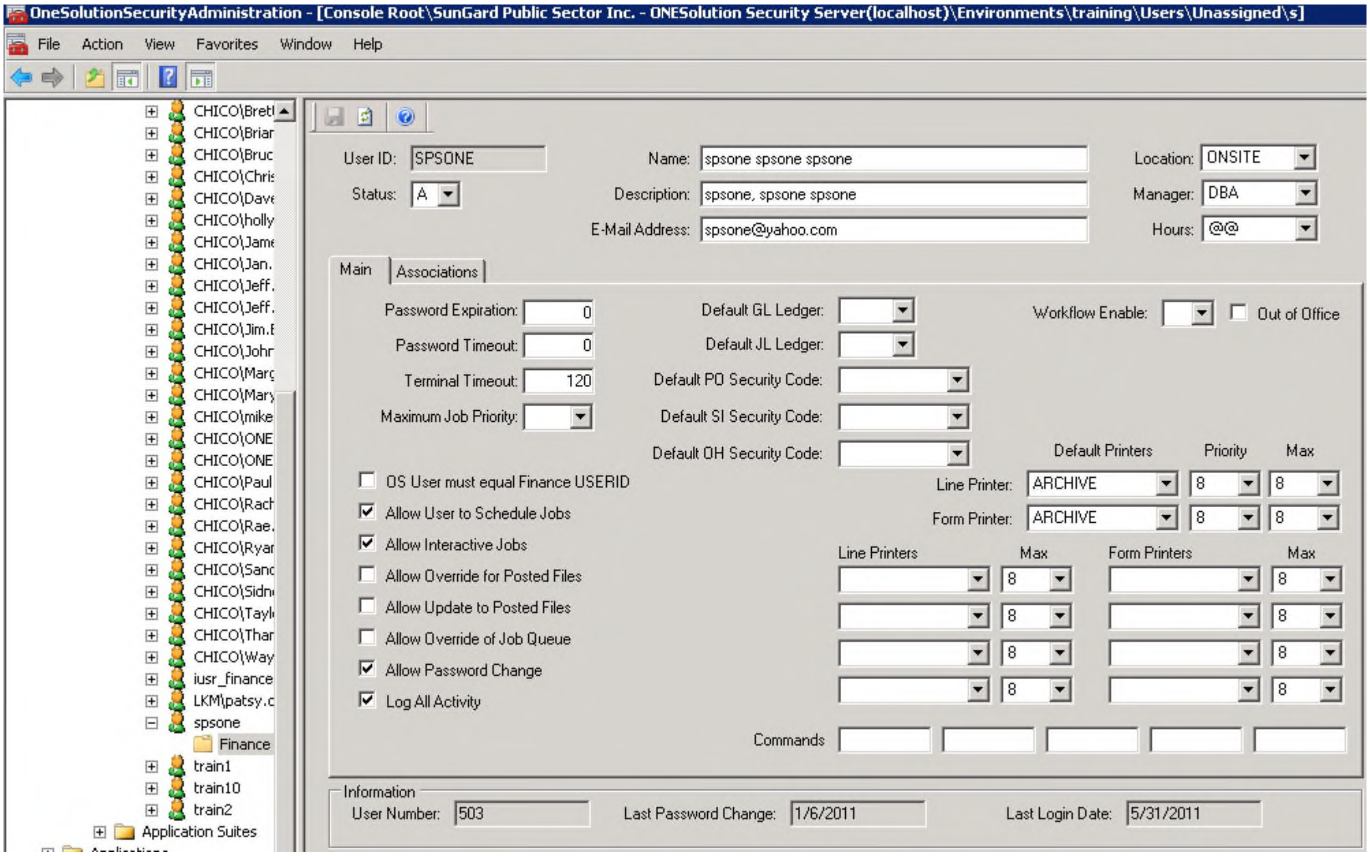
4. Timekeeper Security – Restricting by timekeeping group must be set up in SPSONE Console with a limited security role.
5. Logon to SPSONE Console
   - Now select your user in the list of users.
     - Select the correct Environment
     - Select the folder for Users
     - Select the next folder that your portal user resides in, in this example, we are selecting Unassigned



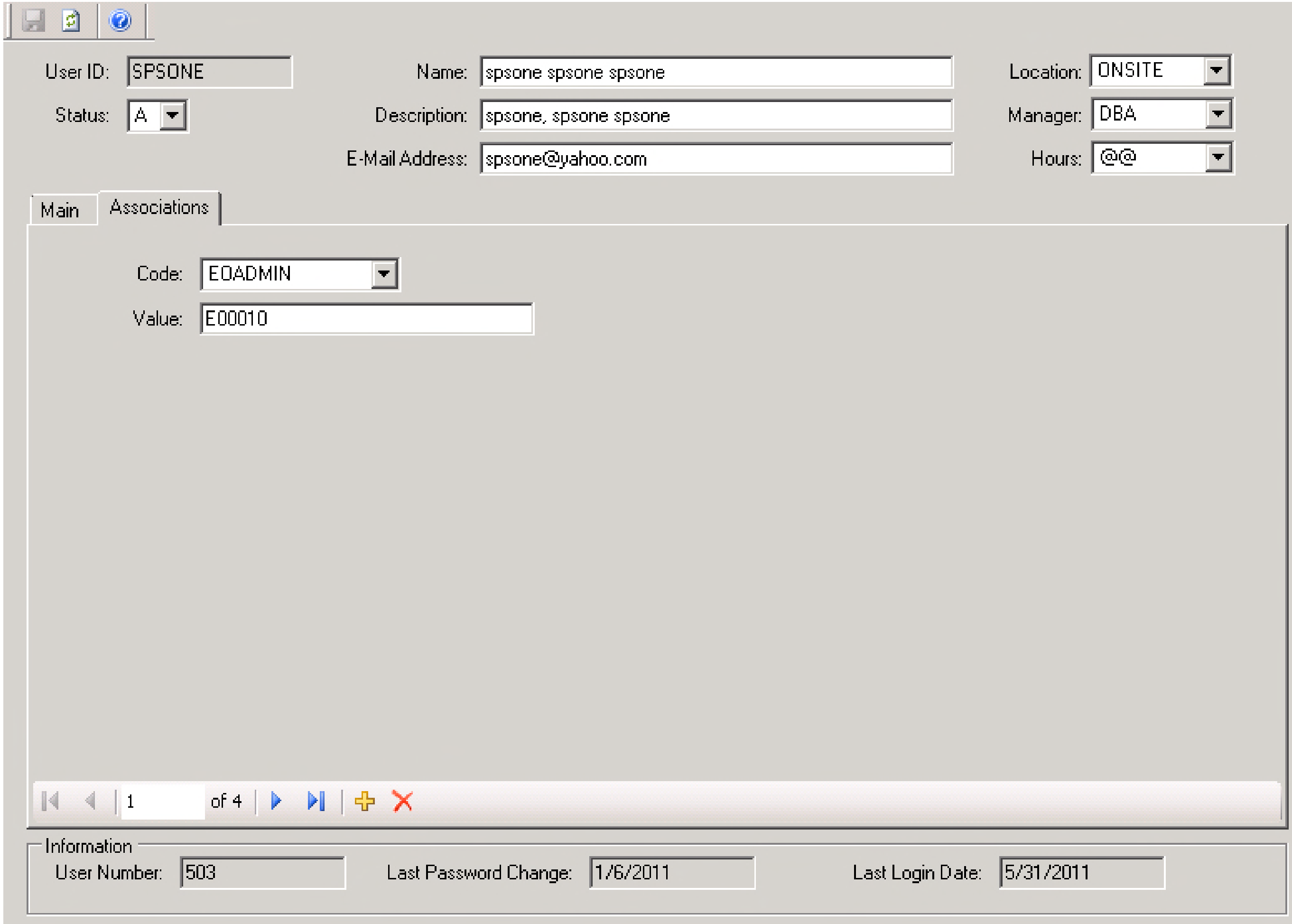
     - Select the User (SPSONE)

- Select the + next to the user so you will see a Finance User Settings folder

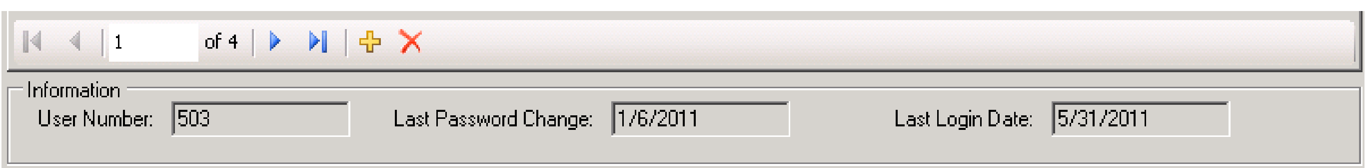
- By selecting this folder, the user definition will appear

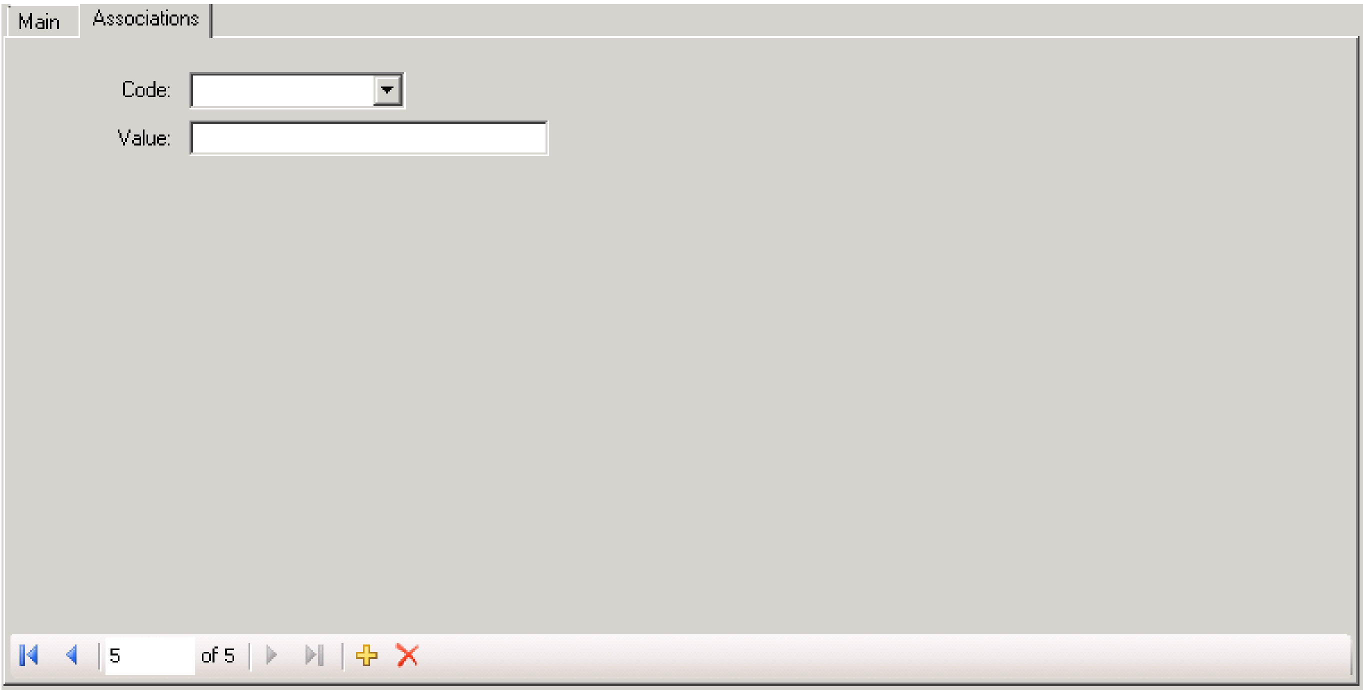


- Select the Associations tab

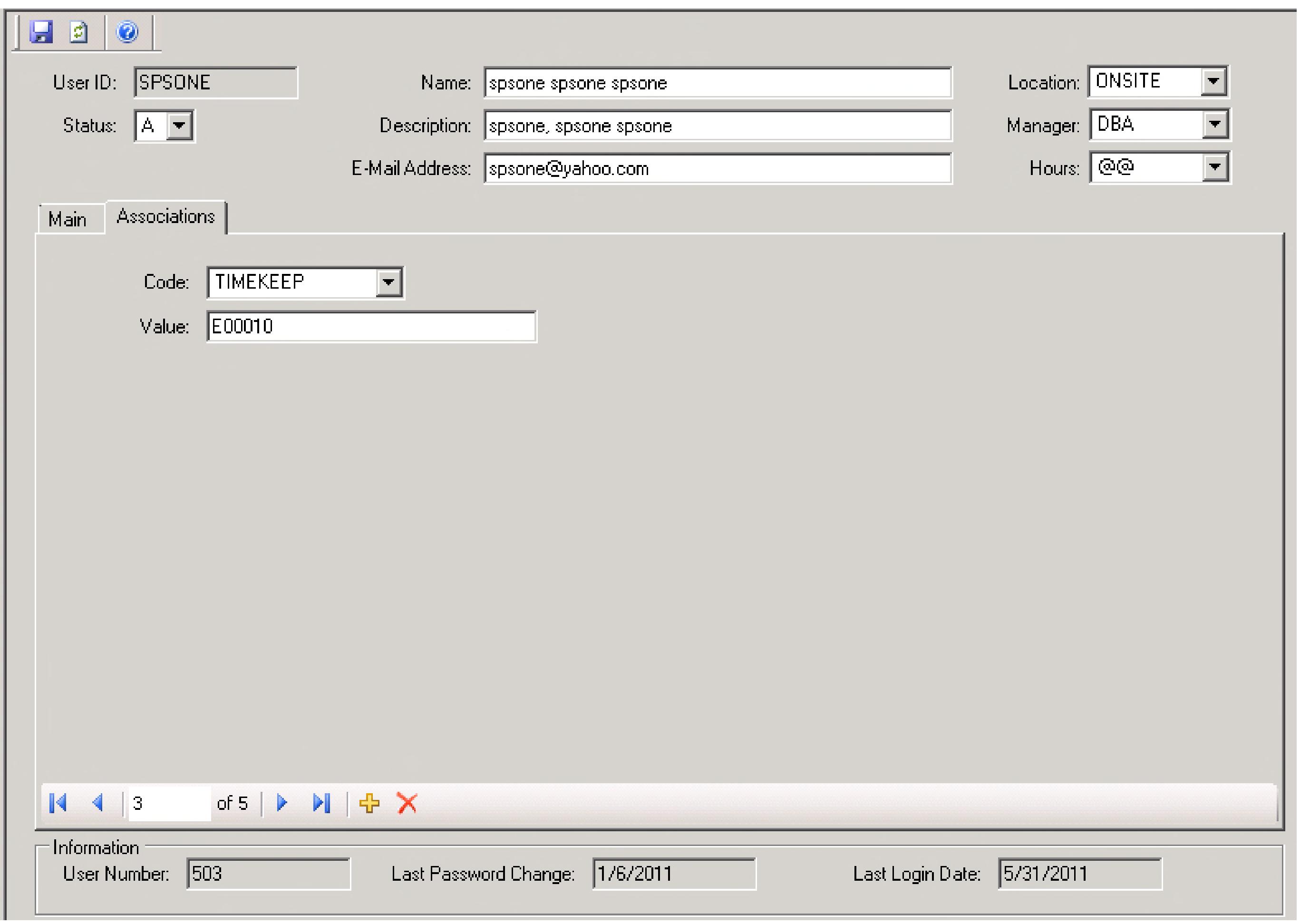


- Select the "+" (ADD) button at the bottom on the tab





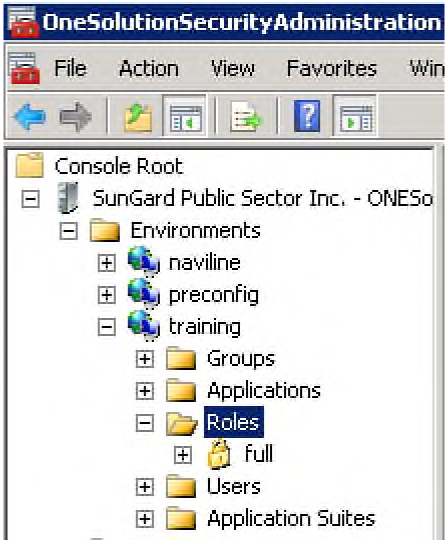
- Now in the code drop down, select TIMEKEEP
- Enter the Employee ID in the Value field



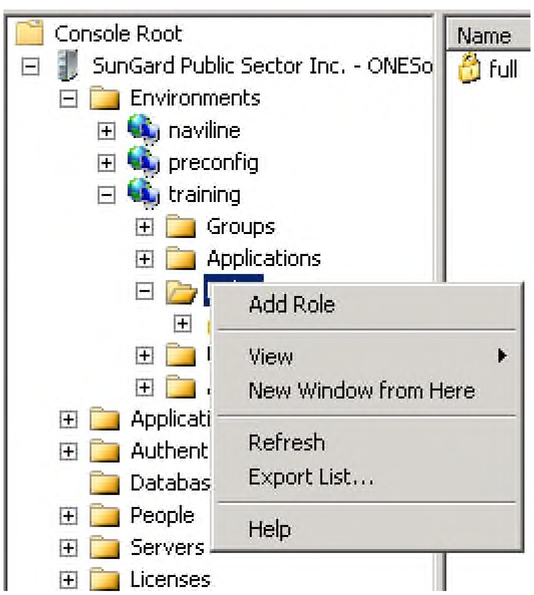
- Select Save (floppy disc icon) at the top of the screen to save this record

- Creating and Assigning a Timekeeper security role

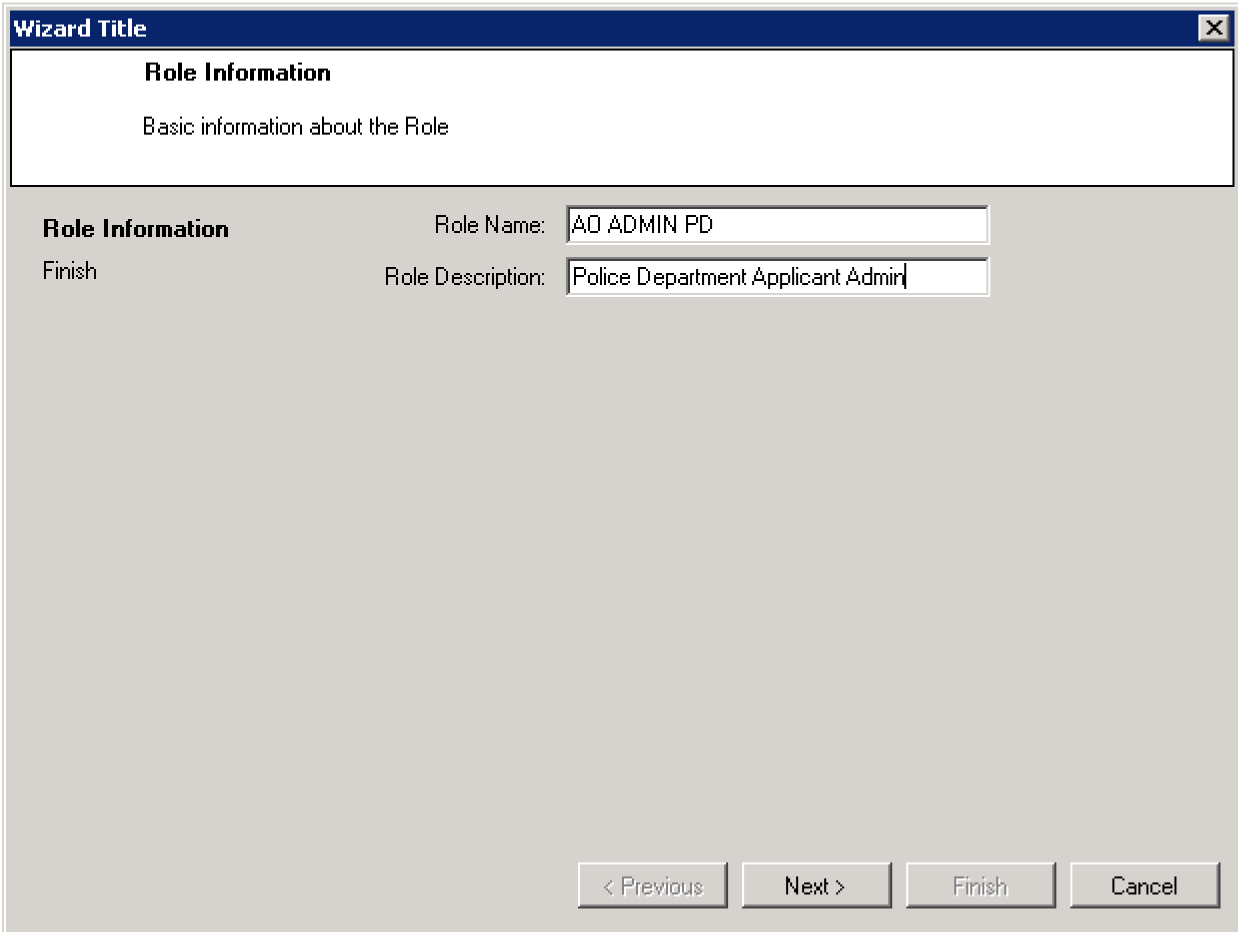
- Within the Security Console, select the correct account
- Select the Roles folder



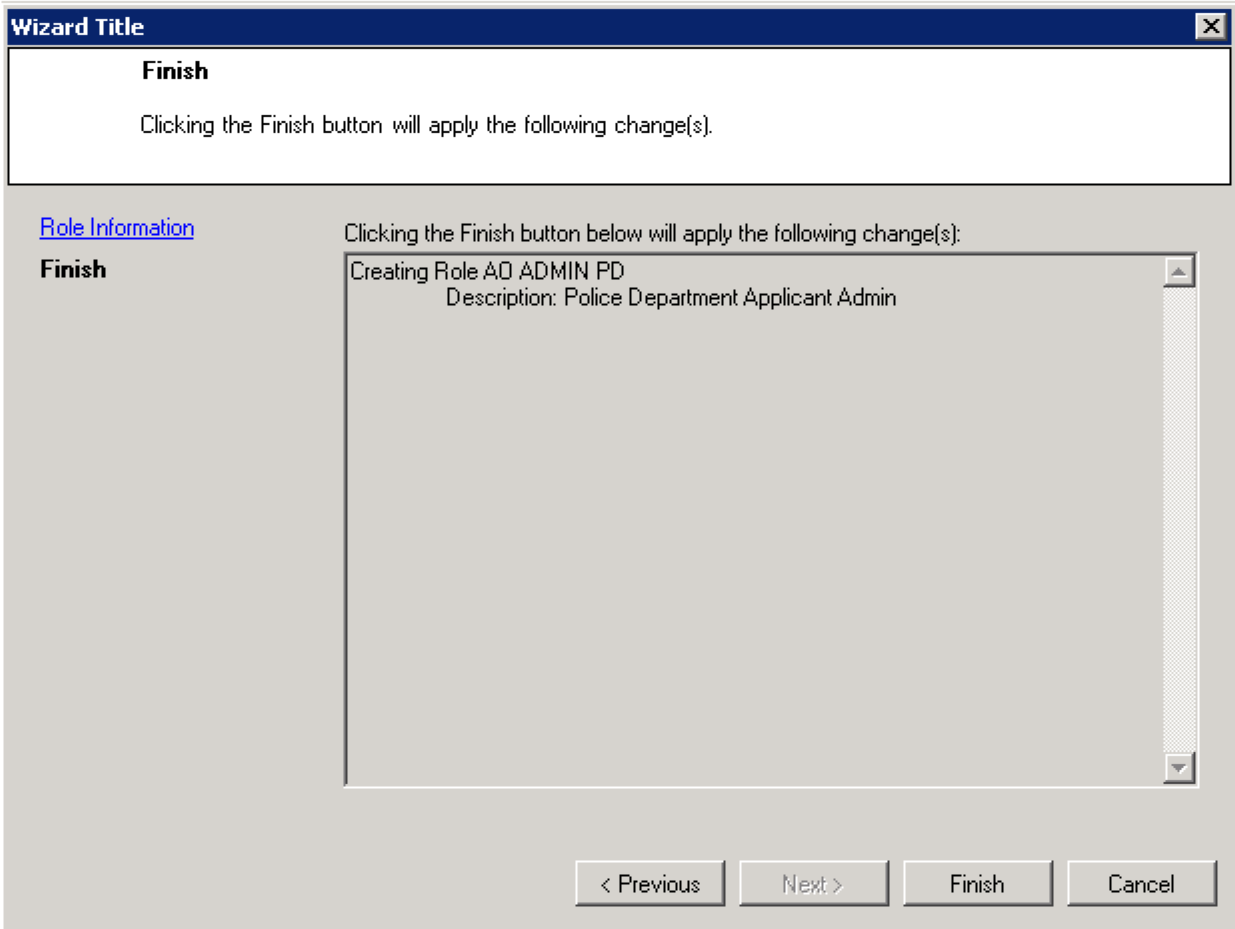
- Right click on Roles
- Select Add Role



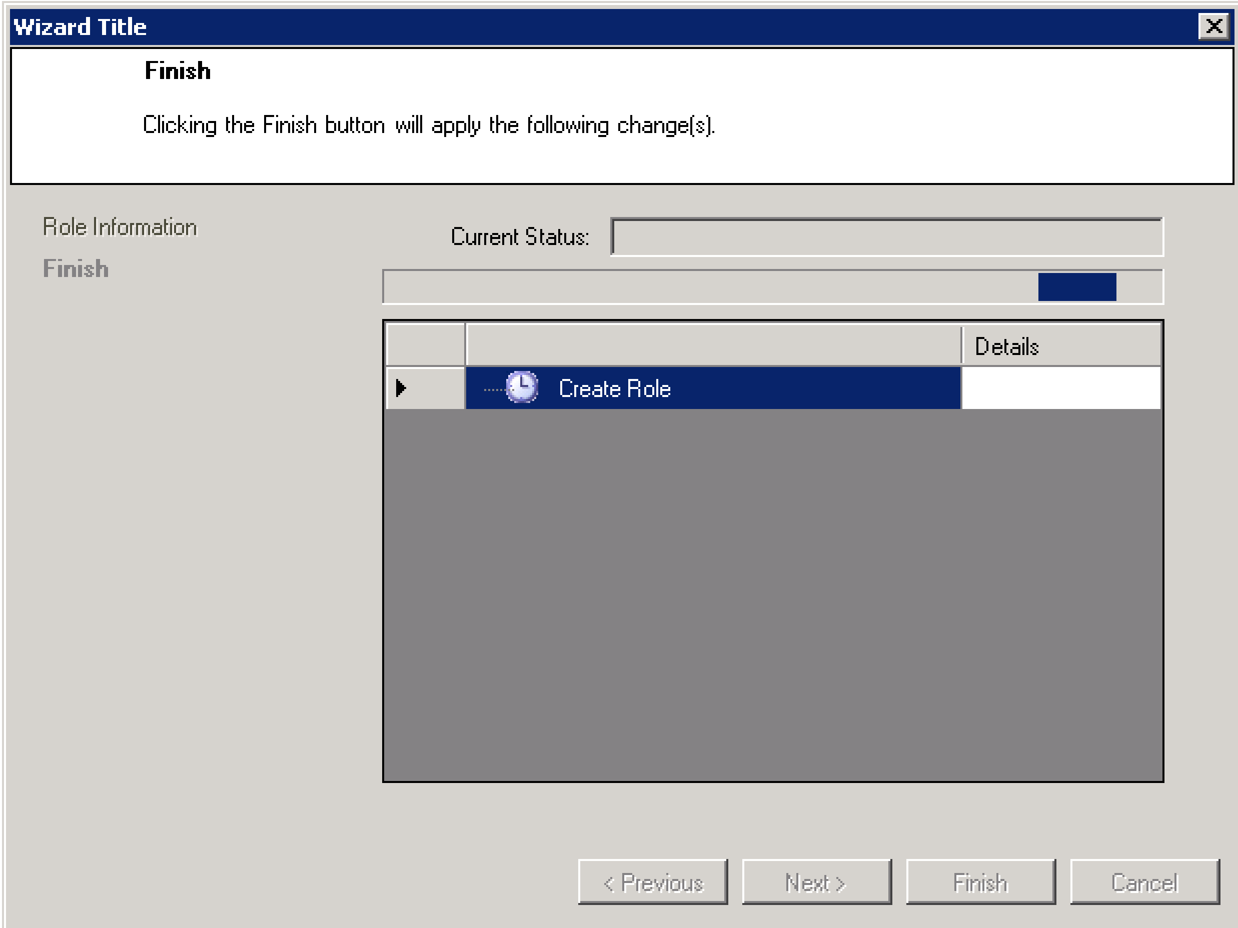
- Enter the Role Name and Role Description


Wizard Title
Role Information
Basic information about the Role
Role Information
Finish
Role Name:
AO ADMIN PD
Role Description:
Police Department Applicant Admin
< Previous
Next >
Finish
Cancel

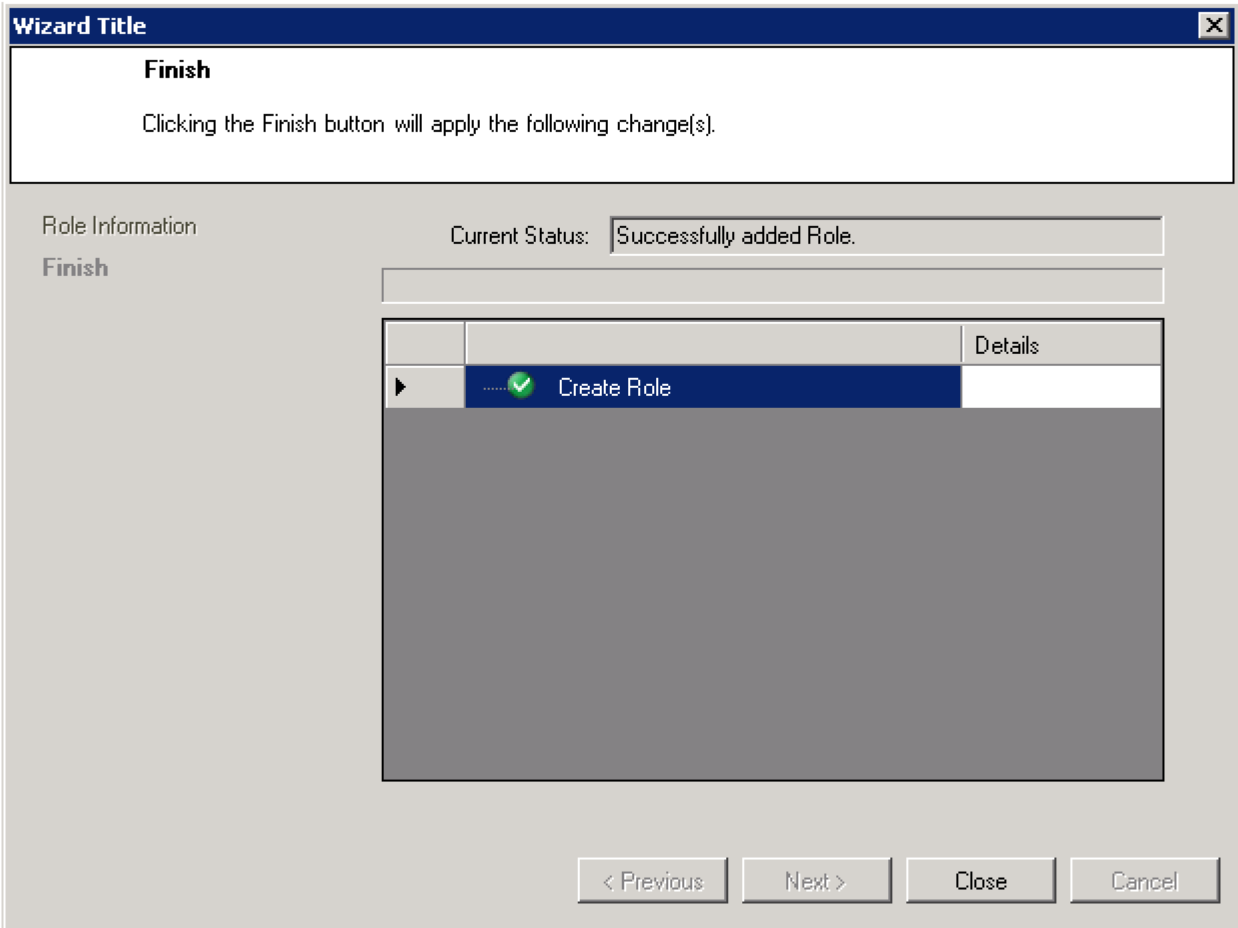
- Select Next



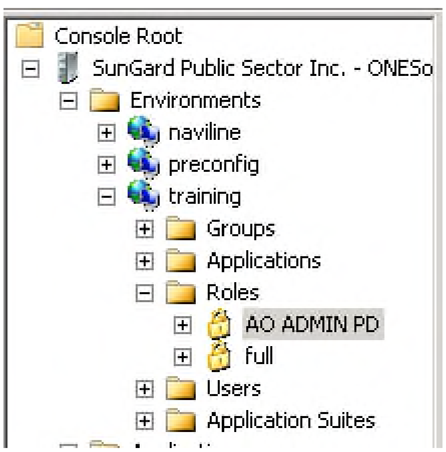
- Select Finish



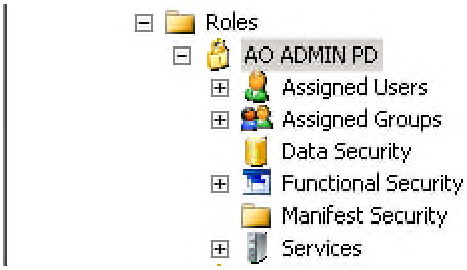
- Your role will begin to build



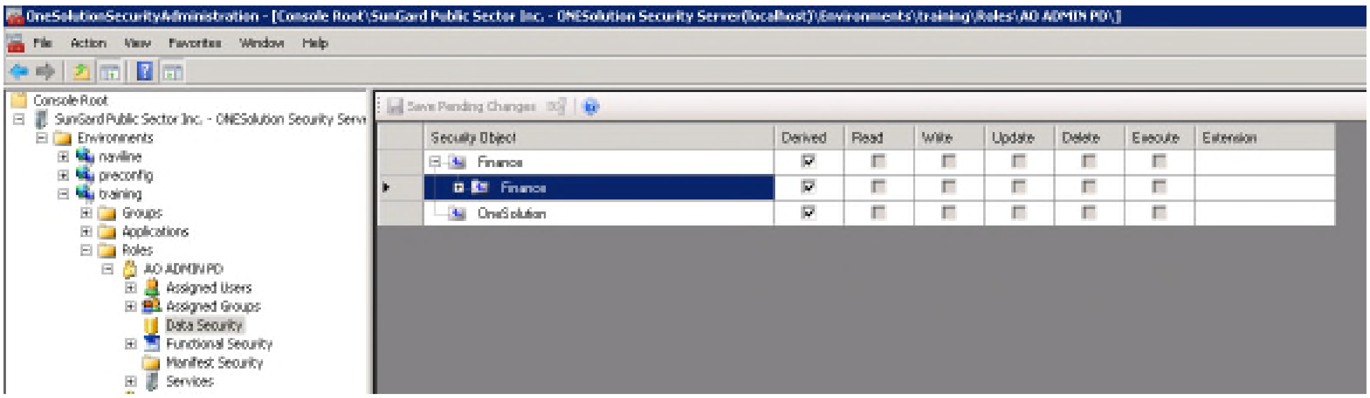
- Select Close
- Now in the Roles folder, you will see your role



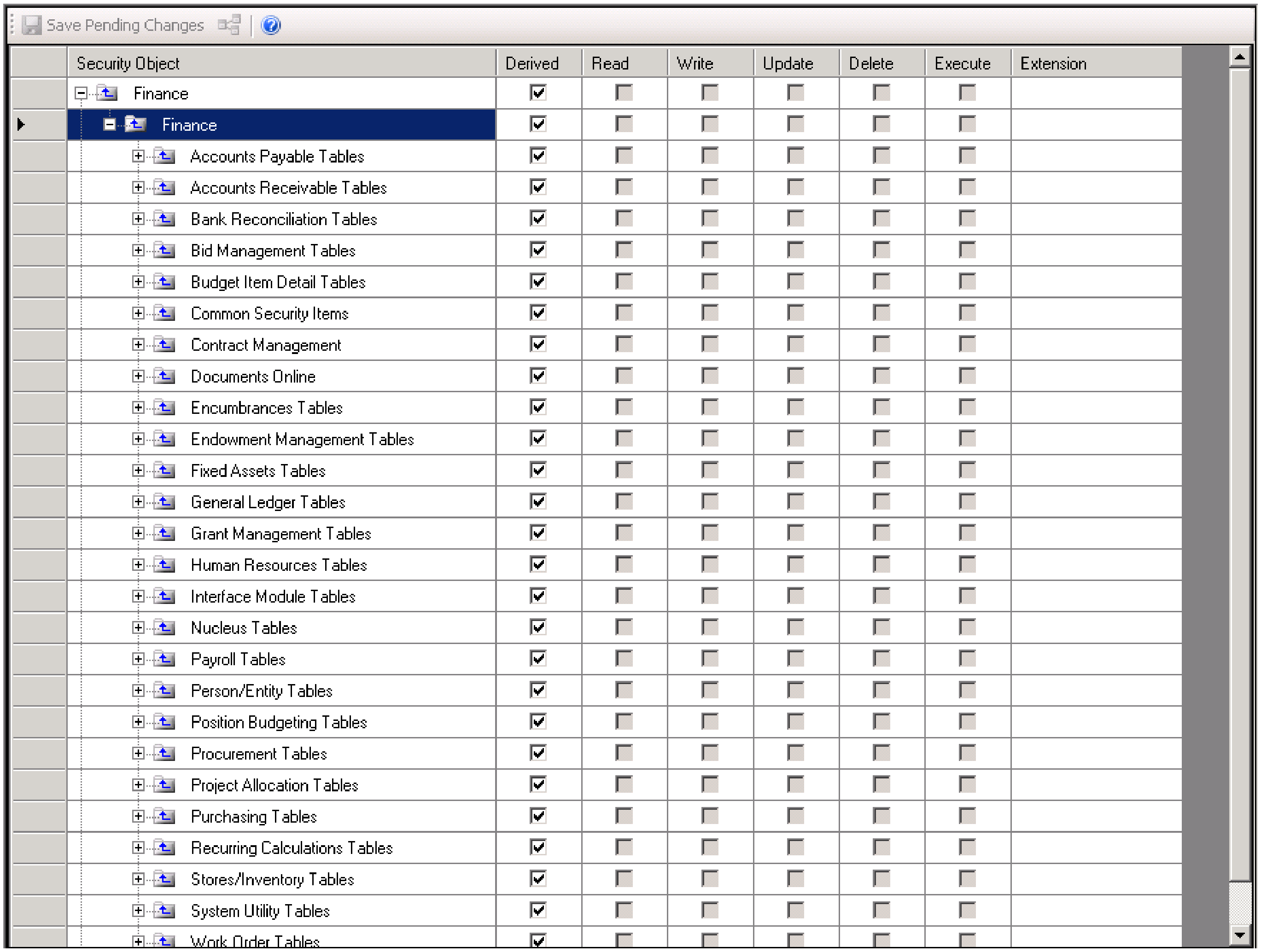
- Select the + option to expand your new role



- Select Data Security
    - This will open up the security menu



- Expand under Finance

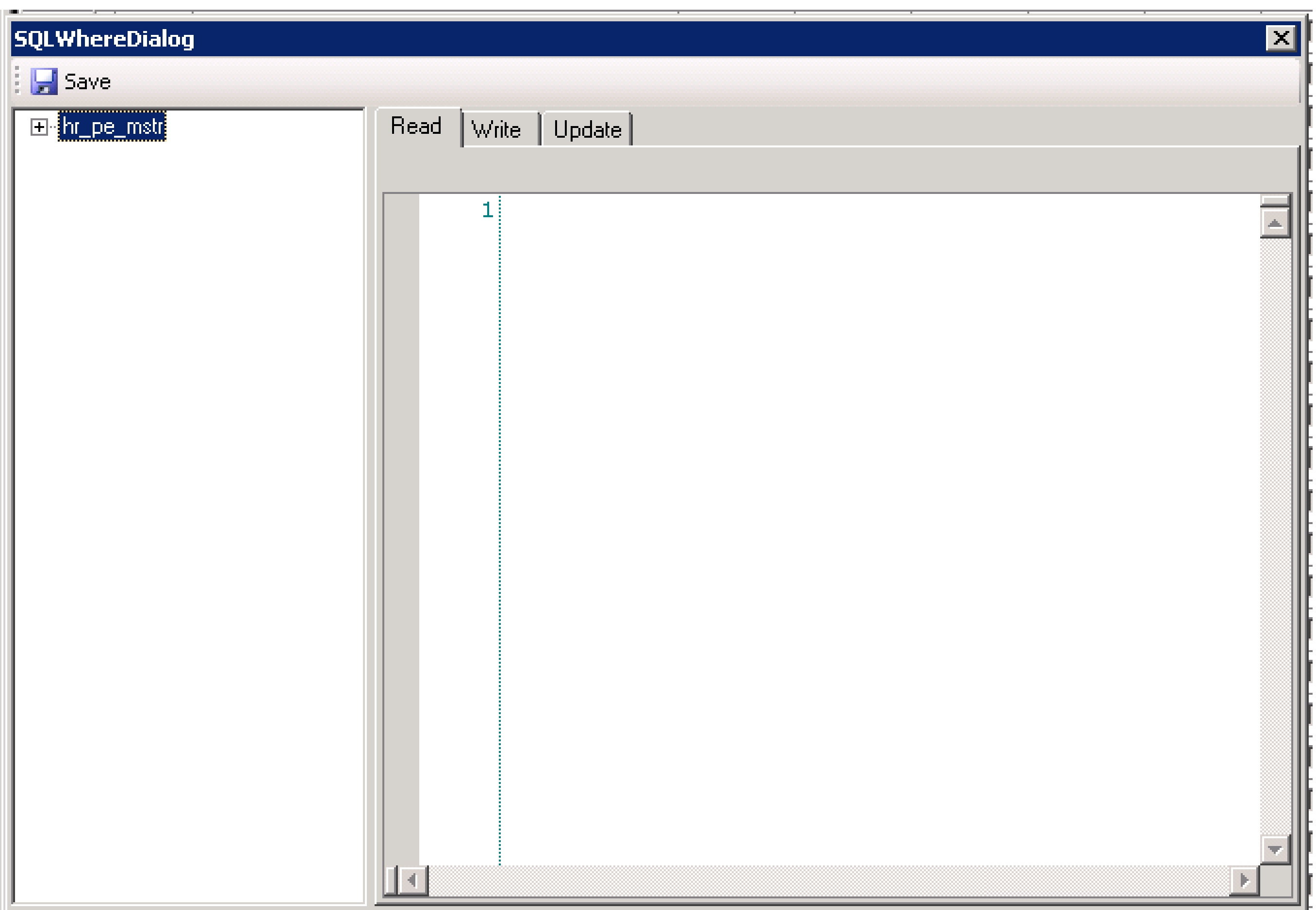


Save Pending Changes

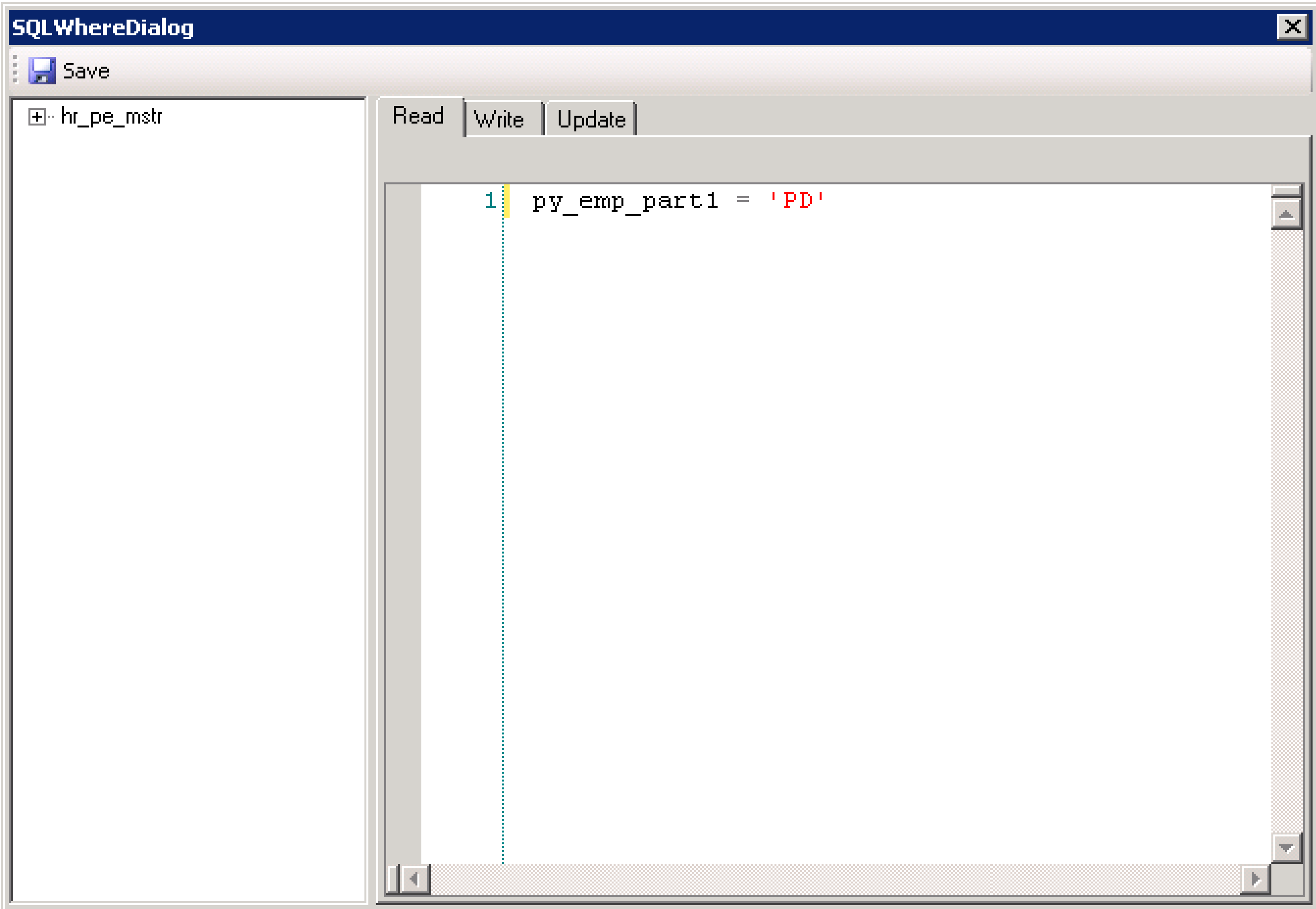
Security Object	Derived	Read	Write	Update	Delete	Execute	Extension
Finance	☑	☐	☐	☐	☐	☐	
Finance	☑	☐	☐	☐	☐	☐	
Accounts Payable Tables	☑	☐	☐	☐	☐	☐	
Accounts Receivable Tables	☑	☐	☐	☐	☐	☐	
Bank Reconciliation Tables	☑	☐	☐	☐	☐	☐	
Bid Management Tables	☑	☐	☐	☐	☐	☐	
Budget Item Detail Tables	☑	☐	☐	☐	☐	☐	
Common Security Items	☑	☐	☐	☐	☐	☐	
Contract Management	☑	☐	☐	☐	☐	☐	
Documents Online	☑	☐	☐	☐	☐	☐	
Encumbrances Tables	☑	☐	☐	☐	☐	☐	
Endowment Management Tables	☑	☐	☐	☐	☐	☐	
Fixed Assets Tables	☑	☐	☐	☐	☐	☐	
General Ledger Tables	☑	☐	☐	☐	☐	☐	
Grant Management Tables	☑	☐	☐	☐	☐	☐	
Human Resources Tables	☑	☐	☐	☐	☐	☐	
Interface Module Tables	☑	☐	☐	☐	☐	☐	
Nucleus Tables	☑	☐	☐	☐	☐	☐	
Payroll Tables	☑	☐	☐	☐	☐	☐	
Person/Entity Tables	☑	☐	☐	☐	☐	☐	
Position Budgeting Tables	☑	☐	☐	☐	☐	☐	
Procurement Tables	☑	☐	☐	☐	☐	☐	
Project Allocation Tables	☑	☐	☐	☐	☐	☐	
Purchasing Tables	☑	☐	☐	☐	☐	☐	
Recurring Calculations Tables	☑	☐	☐	☐	☐	☐	
Stores/Inventory Tables	☑	☐	☐	☐	☐	☐	
System Utility Tables	☑	☐	☐	☐	☐	☐	
Work Order Tables	☑	☐	☐	☐	☐	☐	

- Select Payroll Table
- Select Employee Definition
    - Uncheck Derived and check Read, Write and Update
    - Select Filter

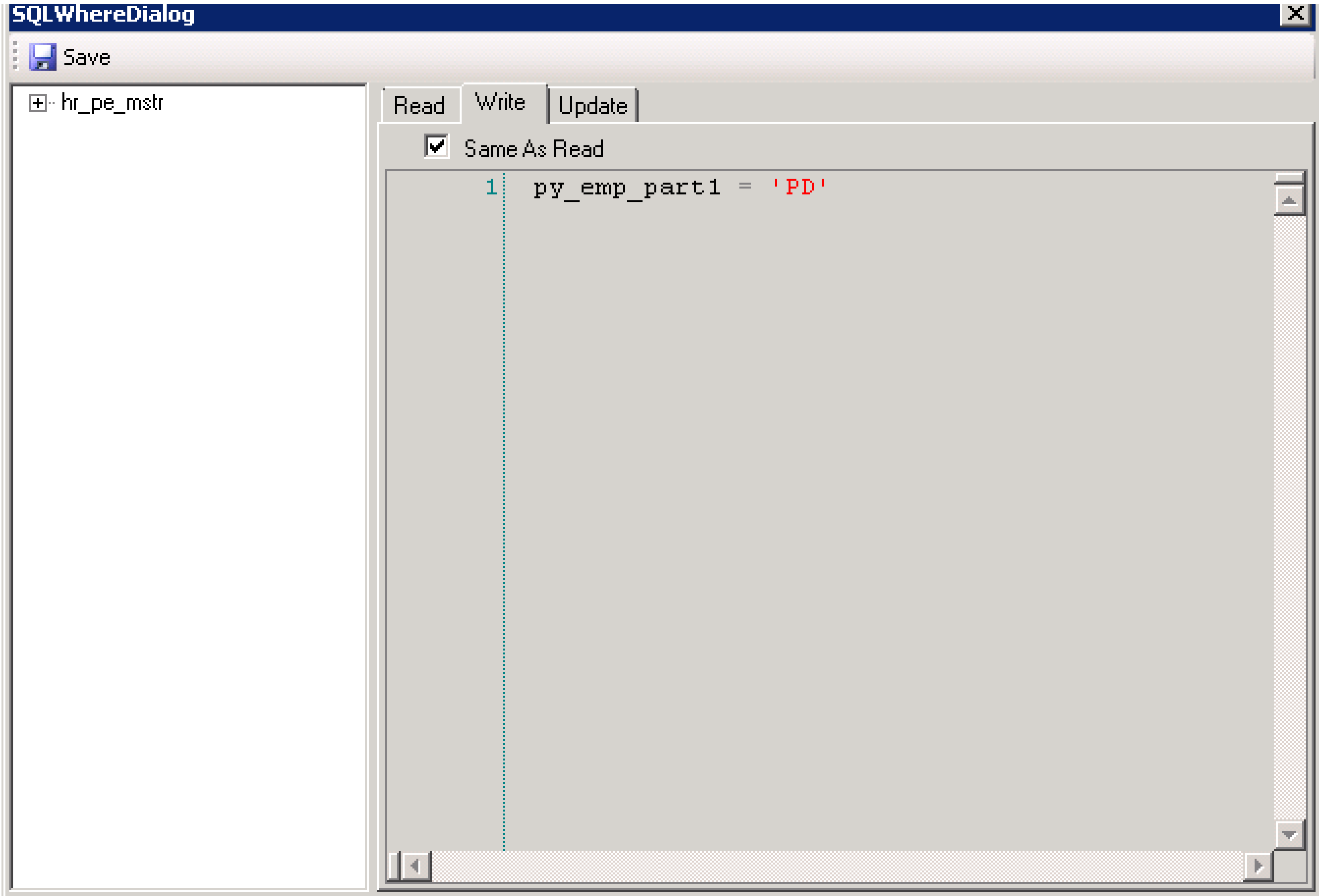
- Select Filter



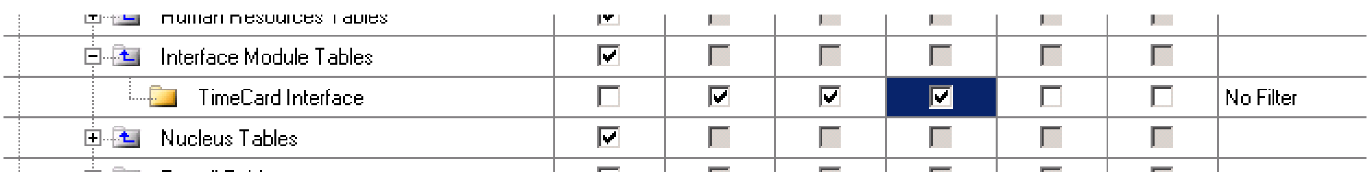
- Enter the part 1 or part 2 that you will be filtering by with the criteria.
    - In the following example, we will filter by Part 1 (Department) and the Department Number



- Select Write and Update and Select Same As Read

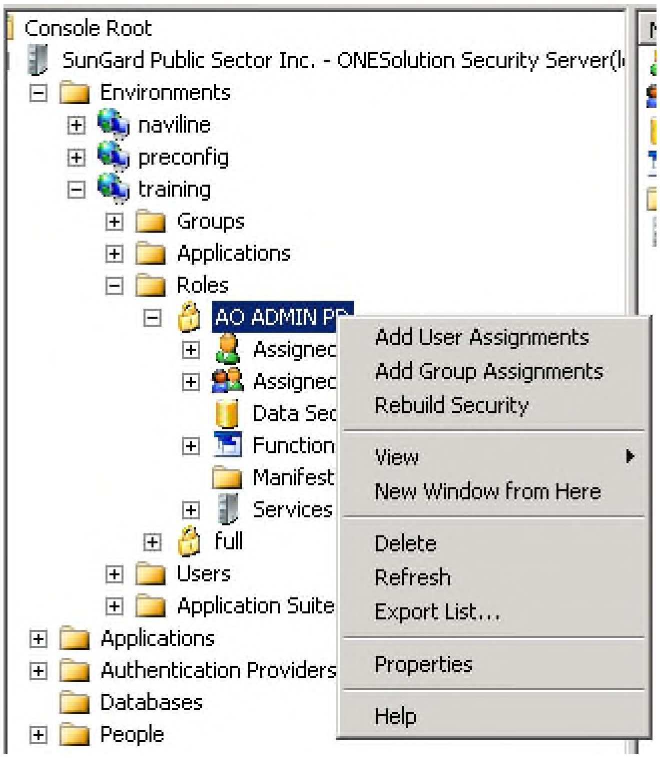


- Select Interface Module Tables
- Select TimeCard Interface
  - Uncheck Derived
  - Check Read, Write and Update

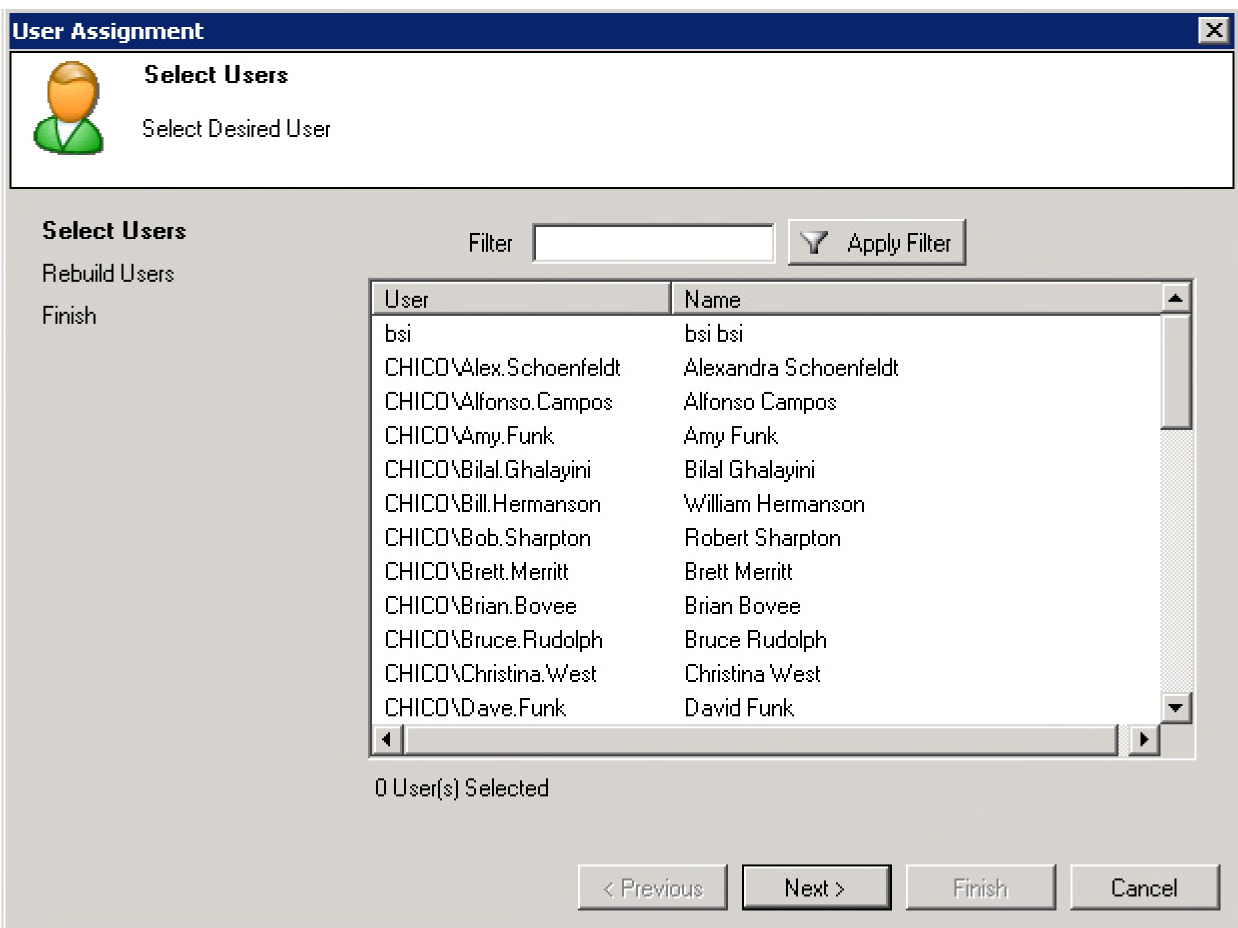


- Select Filter
- Enter ifpy_group = ‘PD’ (department)

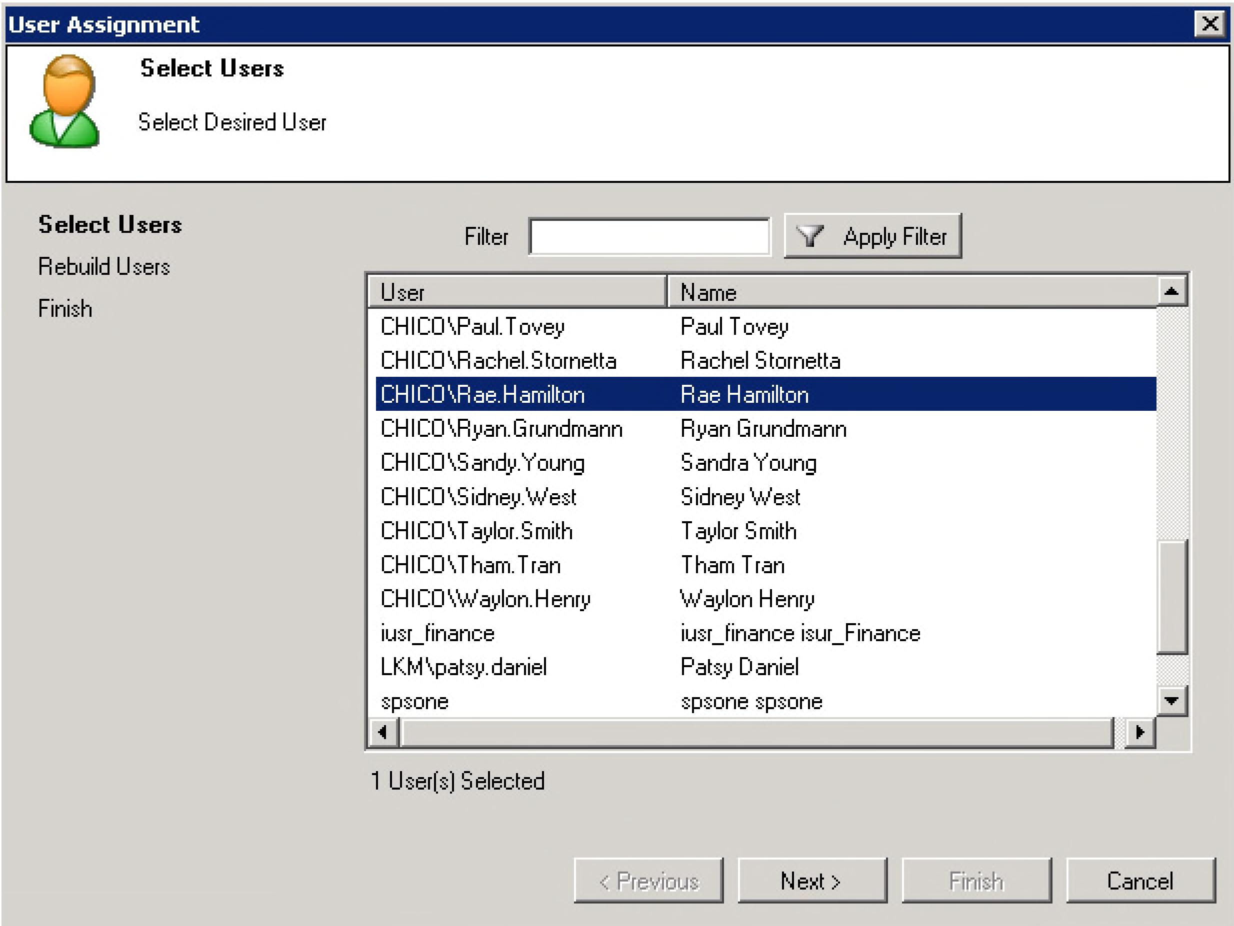
- Now assign each Role ID created to the correct user
  - Right click your role



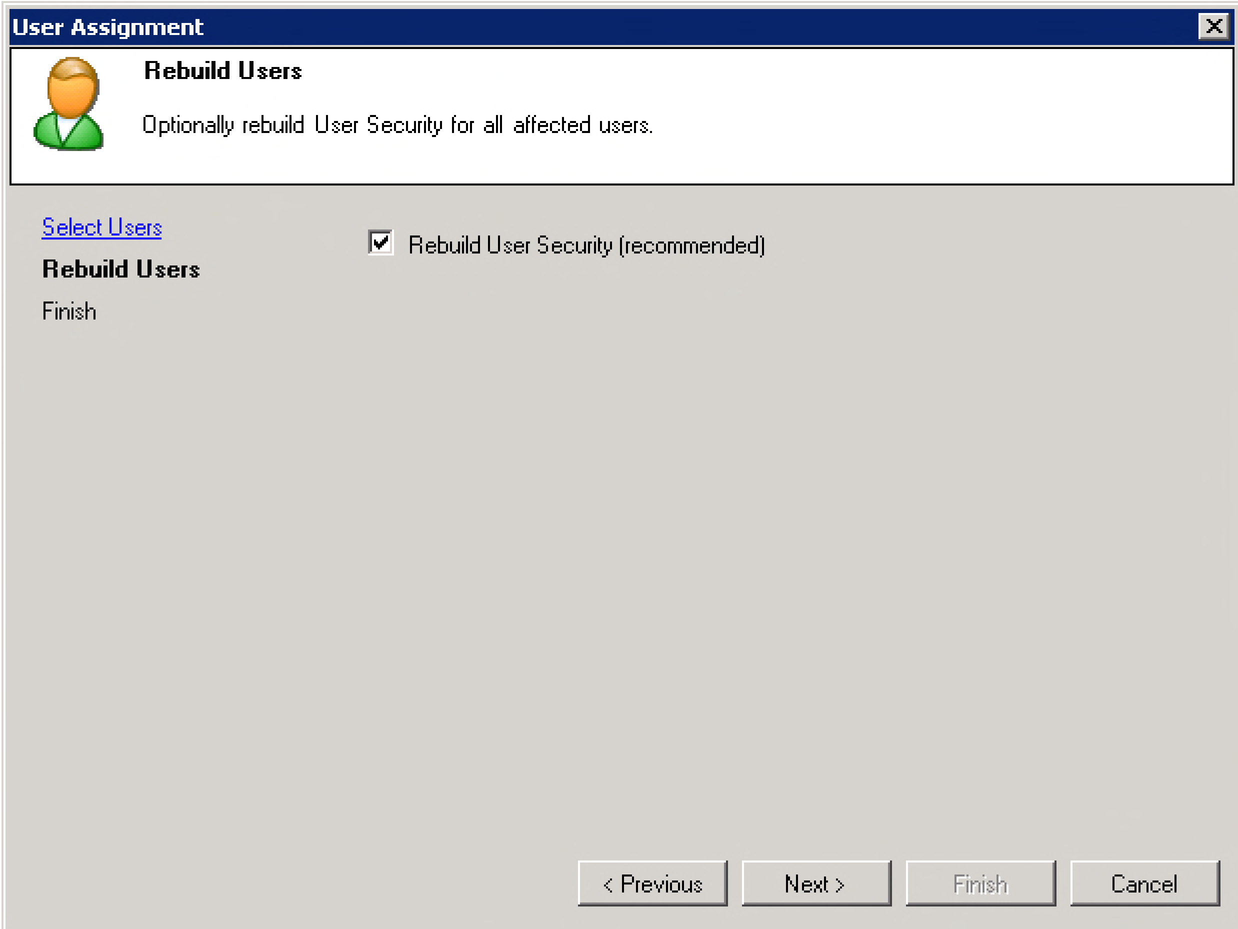
- Select Add User Assignments



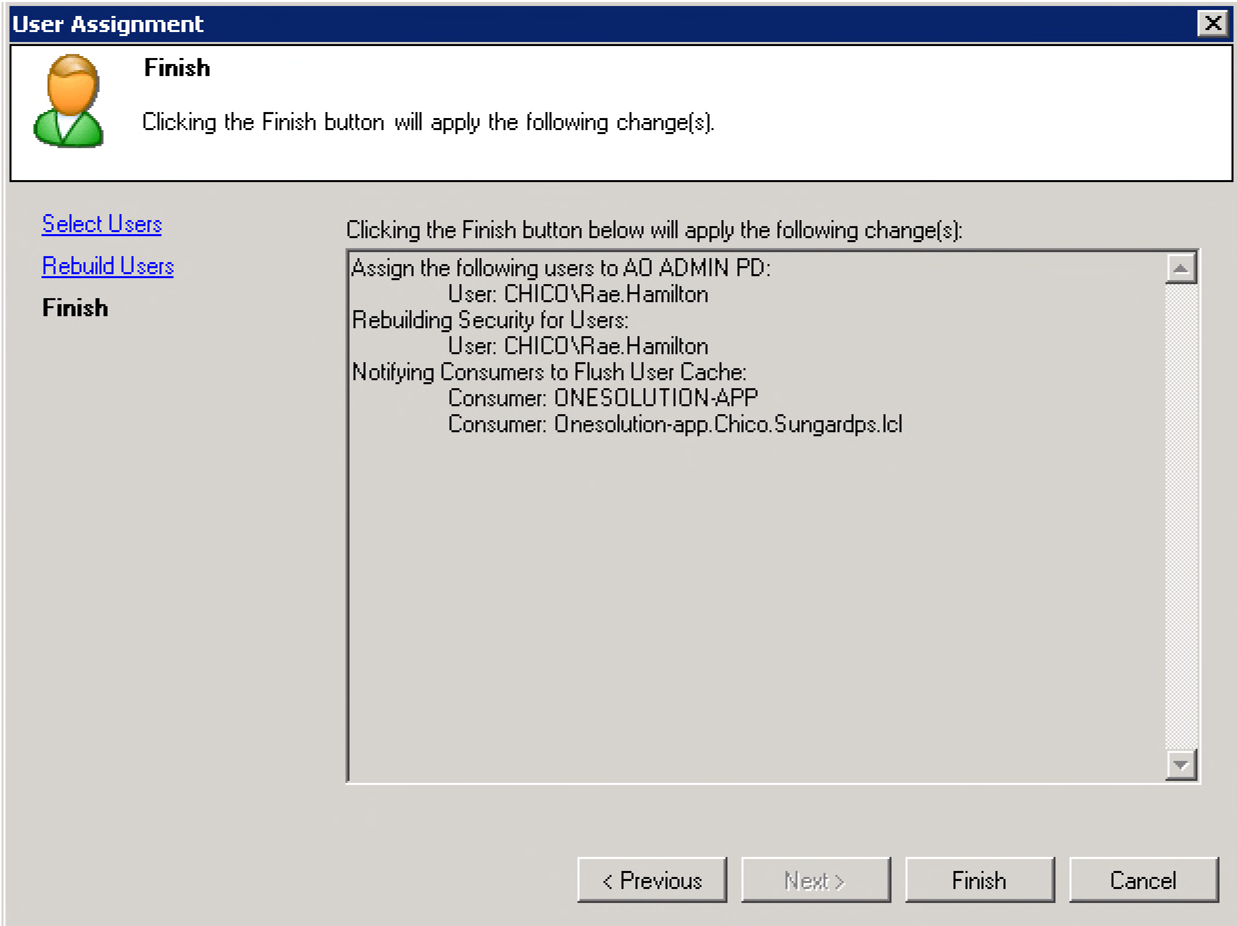
- Now select the correct user



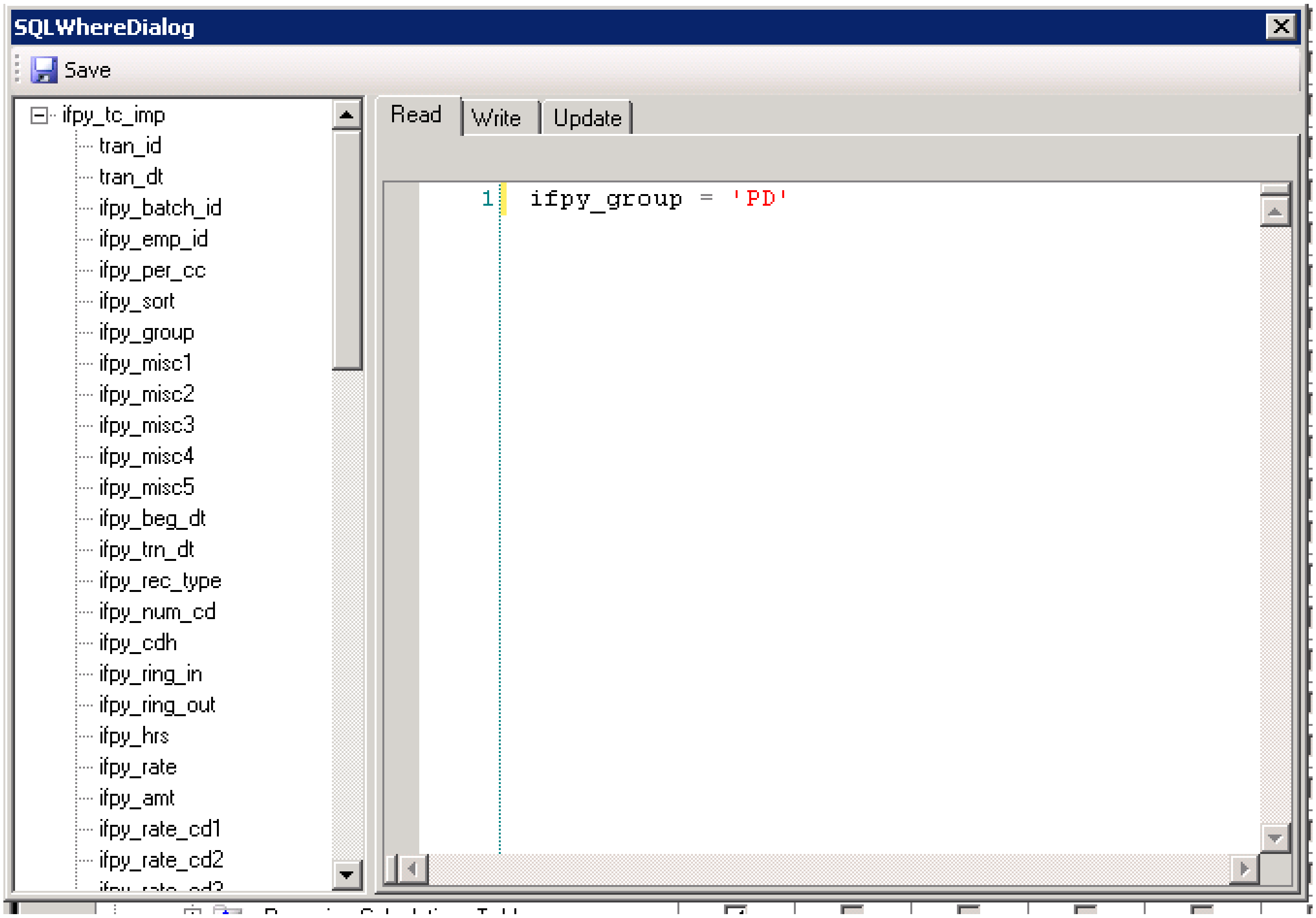
- Select Next


User Assignment
Rebuild Users
Optionally rebuild User Security for all affected users.
Select Users
Rebuild Users
Finish
Rebuild User Security (recommended)
< Previous
Next >
Finish
Cancel

- Select Next



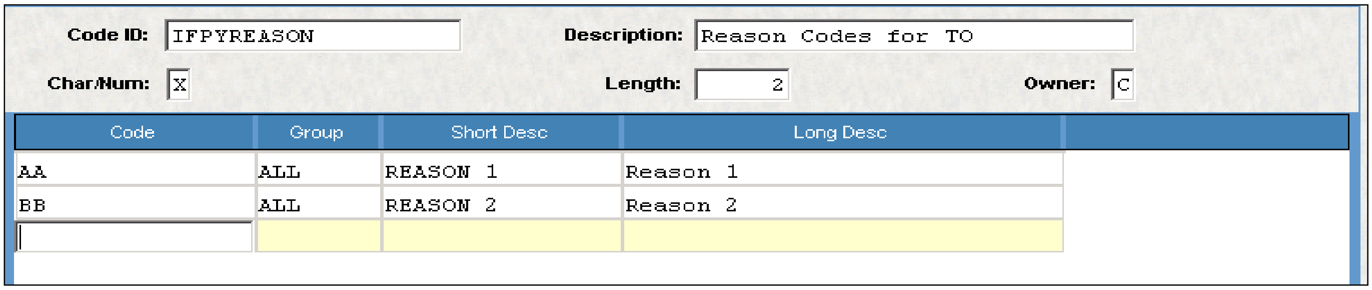
- Select Finish
- Repeat creating Roles and Adding them to Users until all roles are completed



- Select Write and Update tabs and mark Same as Read

14. REASON CODES

Setup reason codes in **PYUPPC**. Add the master record with **Code ID** = **IFPYREASON** if not loaded at the site.



Code ID: IFPYREASON   Description: Reason Codes for TO

Char/Num: X   Length: 2   Owner: C

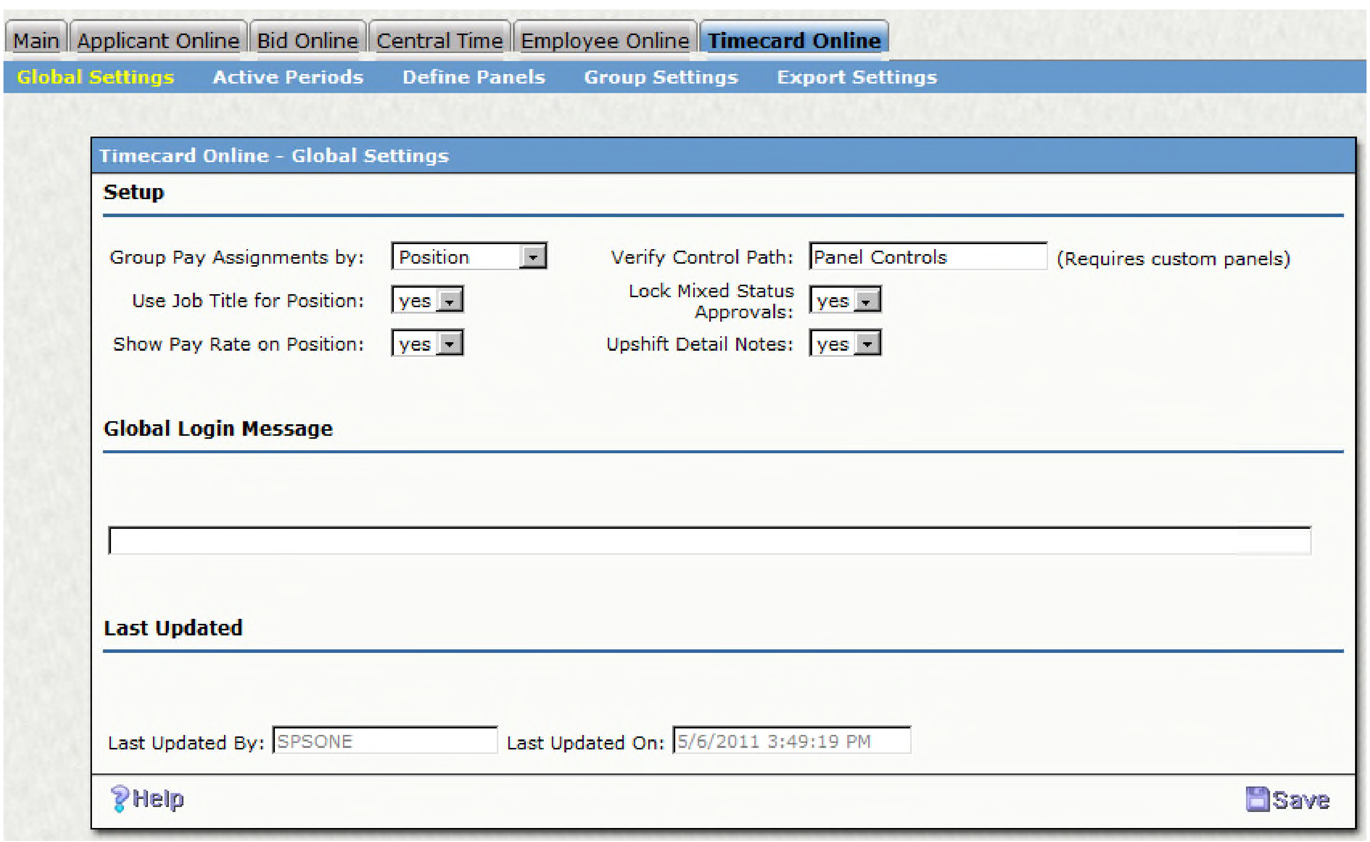
Code	Group	Short Desc	Long Desc
AA	ALL	REASON 1	Reason 1
BB	ALL	REASON 2	Reason 2

15. TIMECARD ONLINE SETTINGS

Global Settings

1. Go to the **NUUPPS**
2. Confirm that a TAB exists for "Timecard Online". (If missing, follow the steps in the Setup Guide to add it.)

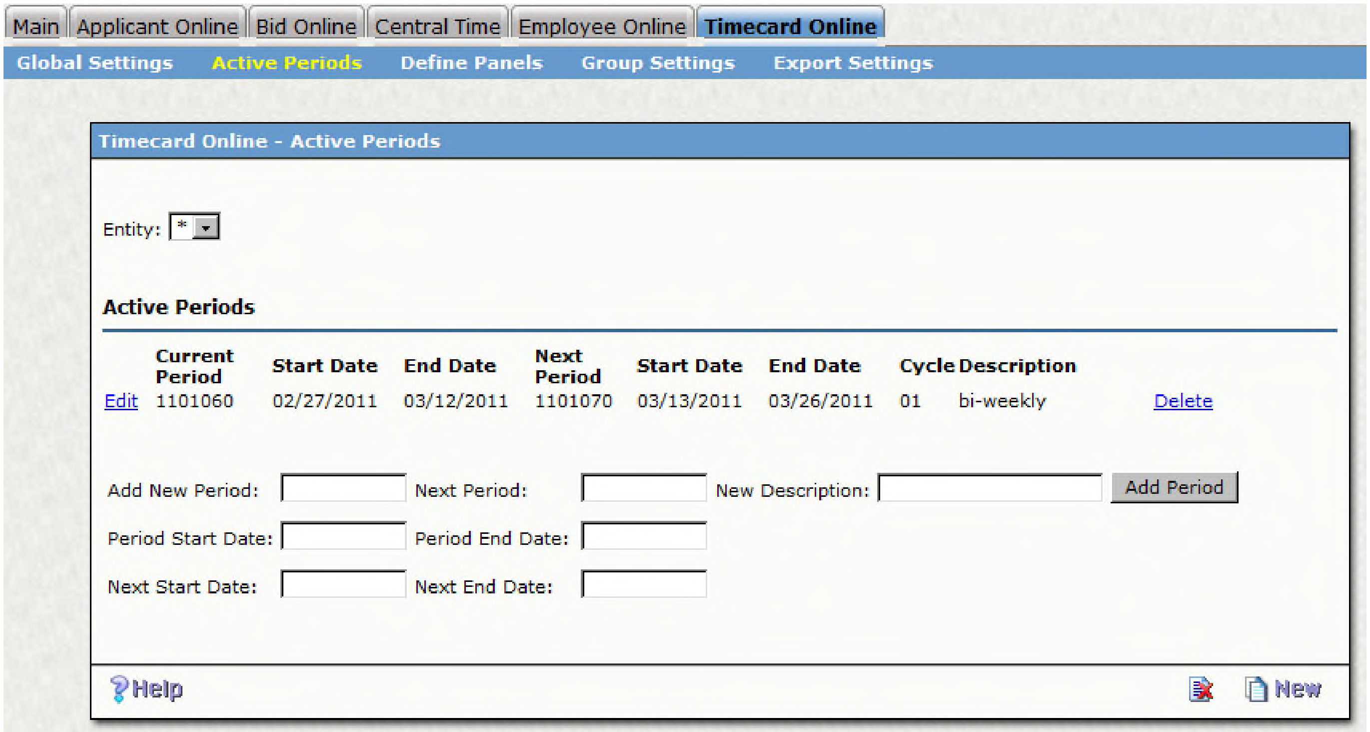
Use the following screen print as an example as an initial setup.



Active Periods

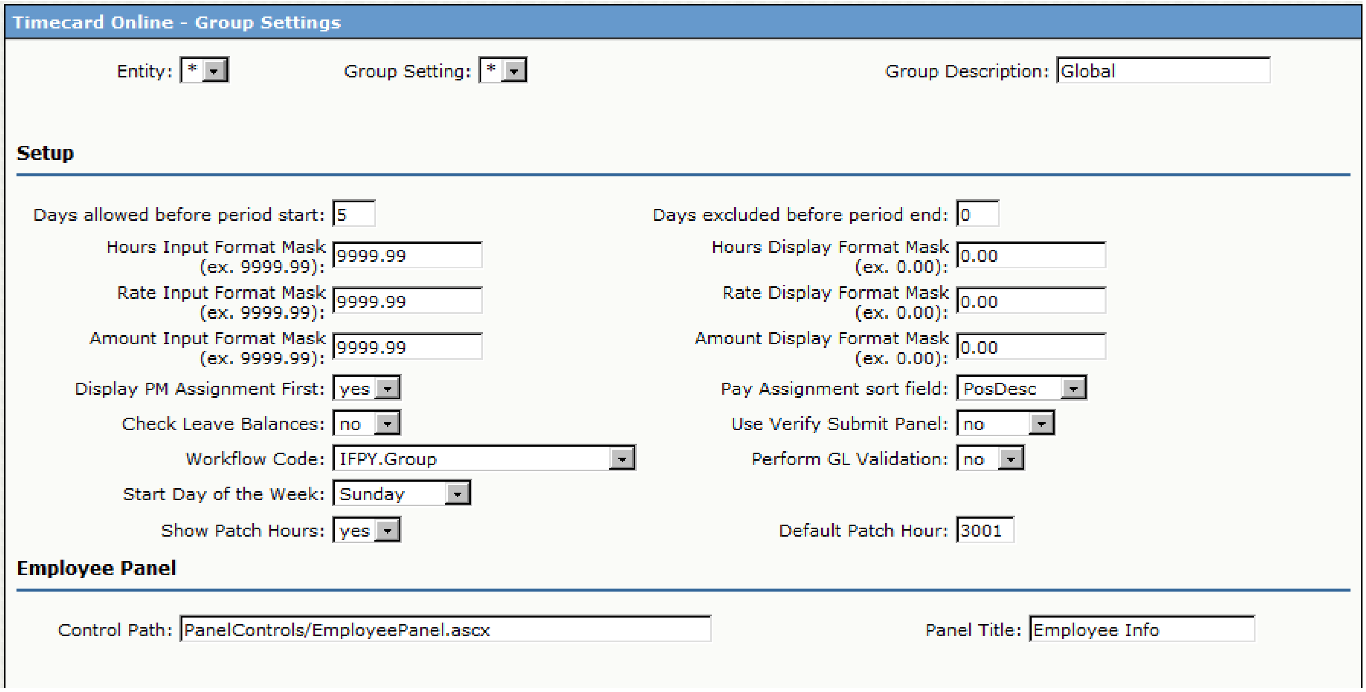
Update the client's setup with a valid pay period (review pay periods in **PYUPPR**) for each cycle.

- Delete the period that came with the install.
- Fill-in the blanks and create a record with the current period (and future period) for at least one cycle (cycle 01). If client has more cycles then add multiple records, one for each cycle.
- SAVE the record.



Group Settings

For the client's initial setup, use the following as a guide. These will be changed as the client completes the Client configuration document. Always keep the "*" setting. Just add screens as clients define specific rules for specific groups.



Timecard Online - Group Settings

Entity: * | Group Setting: * | Group Description: Global

Setup

Days allowed before period start:	5	Days excluded before period end:	0
Hours Input Format Mask (ex. 9999.99):	9999.99	Hours Display Format Mask (ex. 0.00):	0.00
Rate Input Format Mask (ex. 9999.99):	9999.99	Rate Display Format Mask (ex. 0.00):	0.00
Amount Input Format Mask (ex. 9999.99):	9999.99	Amount Display Format Mask (ex. 0.00):	0.00
Display PM Assignment First:	yes	Pay Assignment sort field:	PosDesc
Check Leave Balances:	no	Use Verify Submit Panel:	no
Workflow Code:	IFPY.Group	Perform GL Validation:	no
Start Day of the Week:	Sunday		
Show Patch Hours:	yes	Default Patch Hour:	3001

Employee Panel

Control Path: PanelControls/EmployeePanel.ascx | Panel Title: Employee Info

Leave Panel

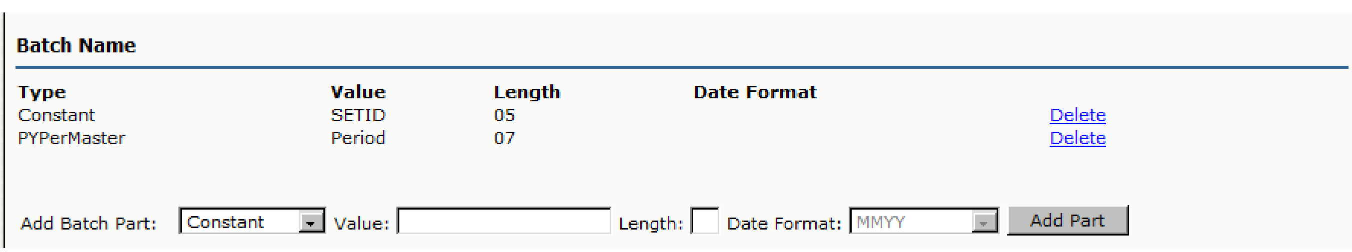
Display Leave Panel First?

Control Path: PanelControls/LeavePanel.ascx | Panel Title: Leave Info

Batch Name

Determine what the batch name should be as a default for *. Recommend a constant + part1 + period. This will depend on the length of the client's part 1 so you may need to delete and re-enter to get them in the right order.

Remember to **SAVE** when done!



Batch Name

Type	Value	Length	Date Format	
Constant	SETID	05		Delete
PYPerMaster	Period	07		Delete

Add Batch Part: Constant | Value: | Length: | Date Format: MMYY | Add Part

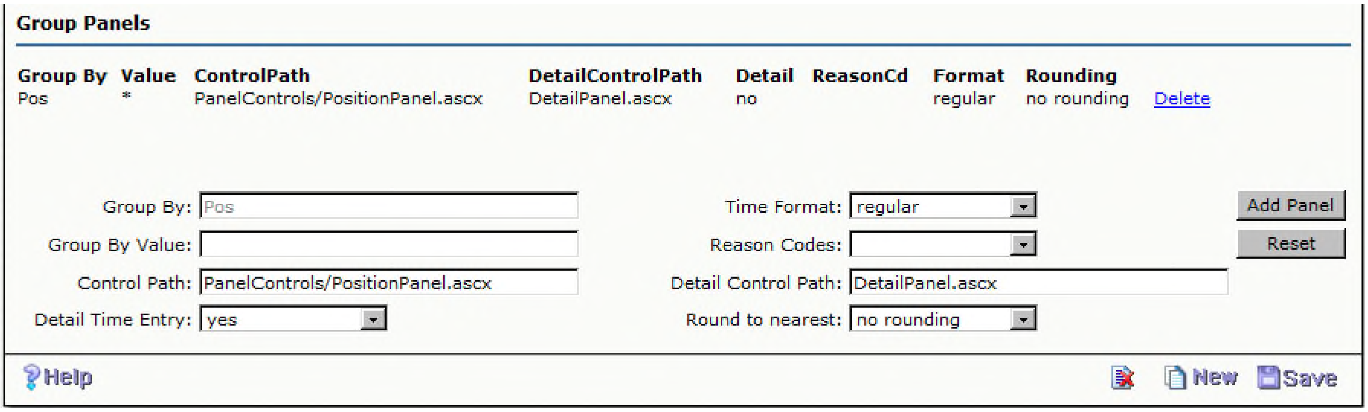
Group Panel

The position panel should work as loaded in the root roll.

If you want to use the new reason codes added earlier,

ADD a new PANEL with Position = * ; ReasonCd = ALL and Reason Codes = ALL.

Delete the PANEL that was loaded on the site with the reason codes blank.



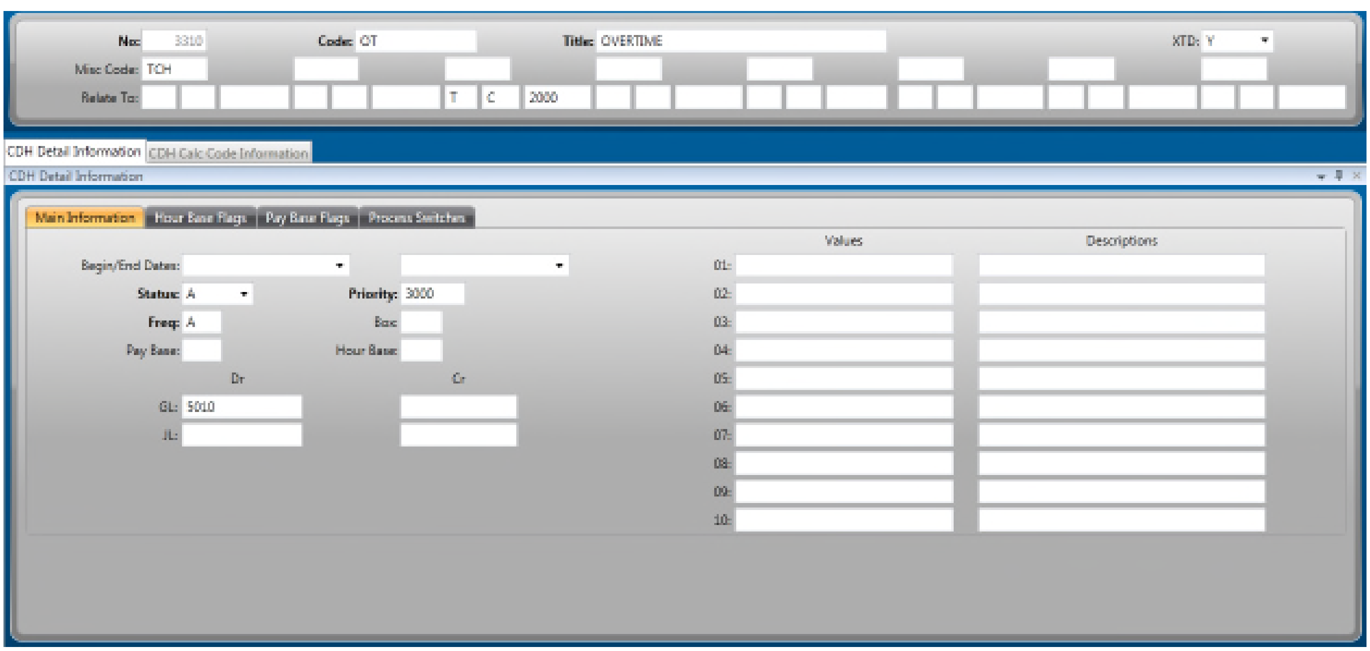
16. HOUR CODE SETUP

Setup **Hour Codes** in **PYUPHH** to be available in **Timecard Online**.

Update **Relate To #3** with **T C 0000** through **T C 99999**.

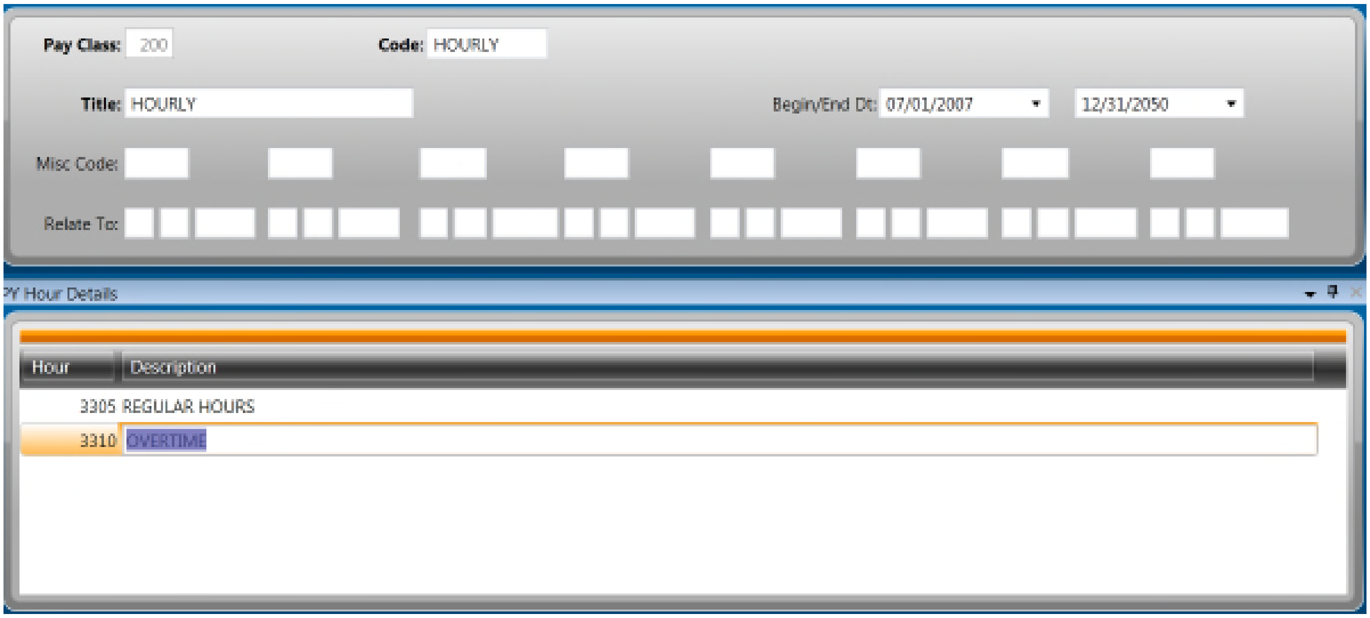
Use the following as an example of **Hour Code** sequencing.

- HOURLY 1000
- OVERTIME 2000
- VACATION USED 3000
- SICK USED 3100
- PERSONAL USED 3200
- OTHER USED 4000



17. PAYCLASS SETUP

Timecard Online reads the **Pay Class** table (**PYUPHH**) to determine the available **hour codes** for each employee, be sure to confirm that all available **hour codes** are defined for the **Pay Class(es)**.



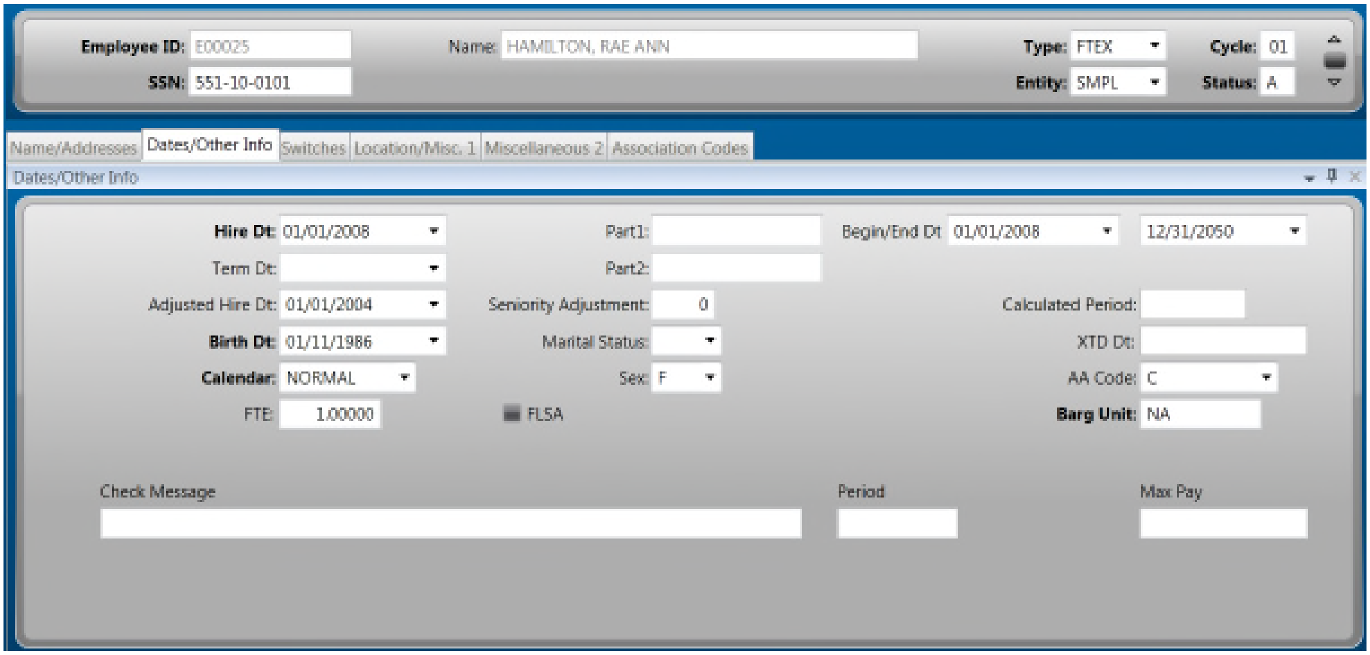
18. EMPLOYEE SETUP

Employee Master (PYUPEM)

Confirm that the employee's **Hire Date** and **Term Date** are **within the pay period dates**, **there cannot be a Last Paid Date.**

The employee **cannot** have a **Term Date** in Payroll.

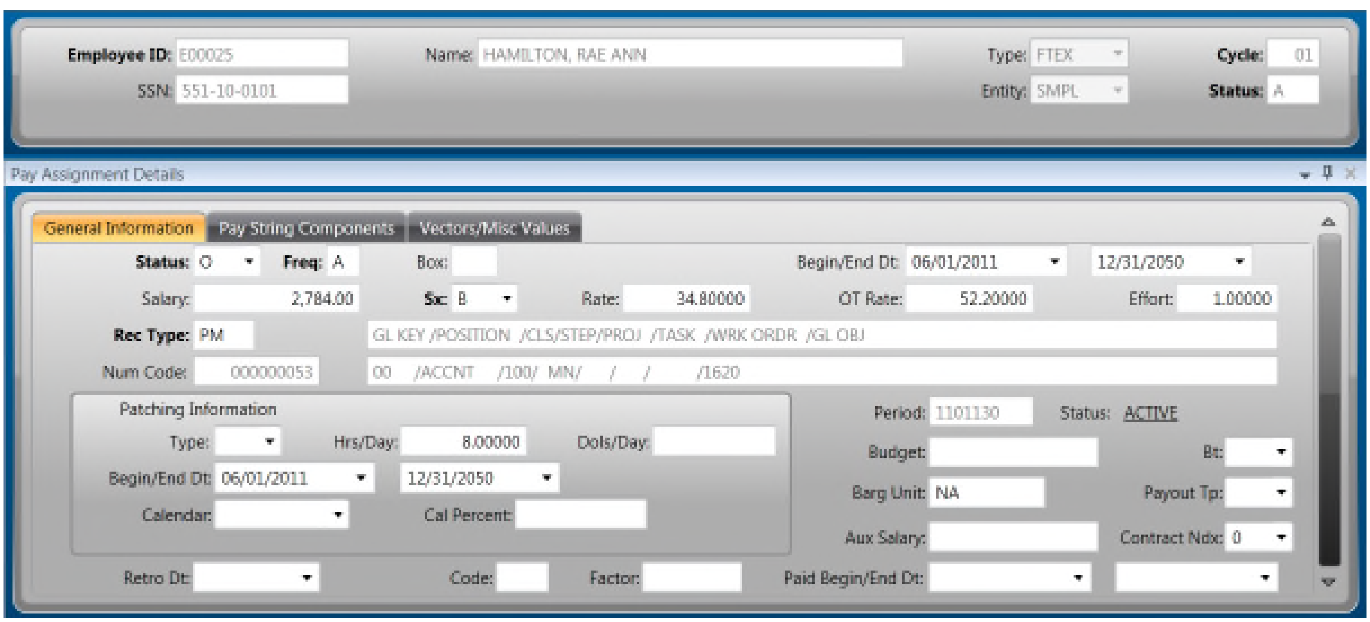
Assign the employee to a **Timecard Group** (if not already a required field)



Employee Pay Assignment (PYUPEP)

Confirm that the employee has an **active pay assignment** in **PYUPEP**.

The only way the employee's **Timesheet** will show-up **Timecard Online** is if there is a **pay assignment active within the period dates**.



19. SET THE TIMECARD GROUPS

Once the common code **HRPY/TCPARTS** is setup in **NUUPCD**, then **PART1** and **PART2** will populate automatically in Payroll when the record is **created**, **updated** and **SAVED**.

During the initial implementation of **Timecard Online**, it may be necessary to run the **Employee Master Global Utility** to send this information to Payroll.

The only way to view **PART1** and **PART2** is in **Timecard Online** (slide the entity list to the right).

This information exists in the table and attributes **hr_pe_mstr.py_emp_part1** and **hr_pe_mstr.py_emp_part2** and may be reported in **CDD**.

20. SET THE LEAVE BALANCES

Until the first **Recompute of Accumulators** (**PYUTRA**) is processed, the balances are set to null rather than zero. Leave balance checking will only work if balances are set to an integer. The **PYUTRA** will set all new balances to zero.

21. CDD REPORTS

Load the standard Timecard Online Batch Proof CDD reports. These can also be made available by the consulting team.

- PY0021 Timecard Batch Proof (PYTC)
- PY0020 Timecard Batch Proof (PYT)

22. WORKFLOW

Modifying the Standard Workflow Model

Verify that the standard TO Workflow model has been loaded into **Workflow Designer**.

- Login to '**Workflow Designer**'.

1. Once in **Workflow Designer**

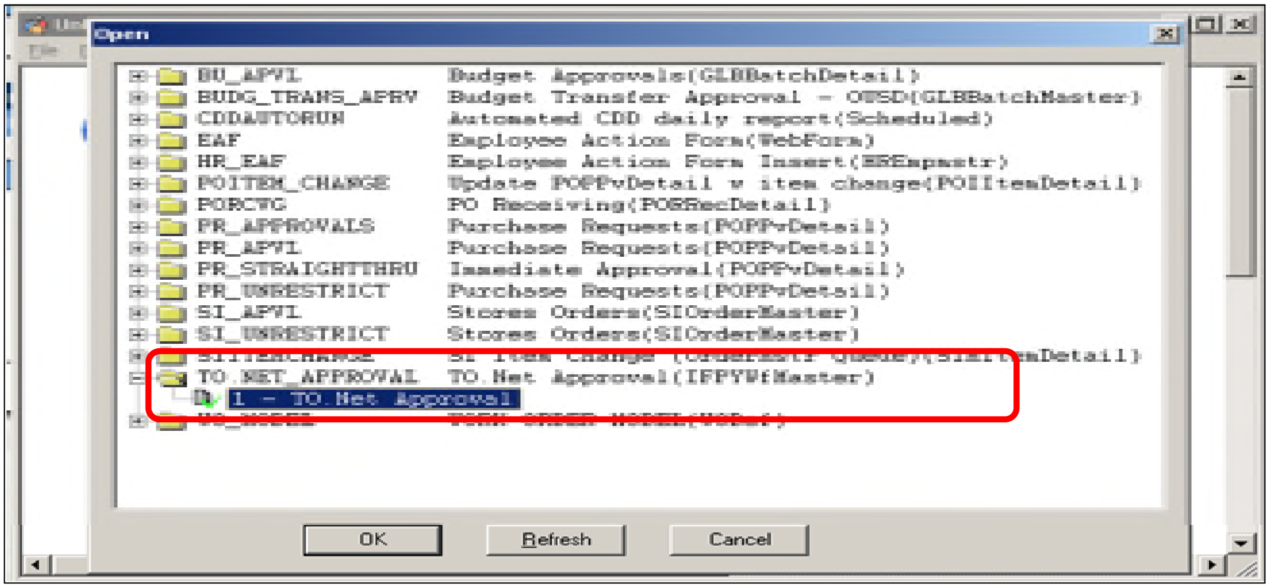
Click **File**

Click **Open** to view all workflow models.

Click on the '**TO.NET_APPROVAL**' folder to open it.

Click '**1-TO.Net Approval**' to highlight the model

Click '**OK**' to open it.



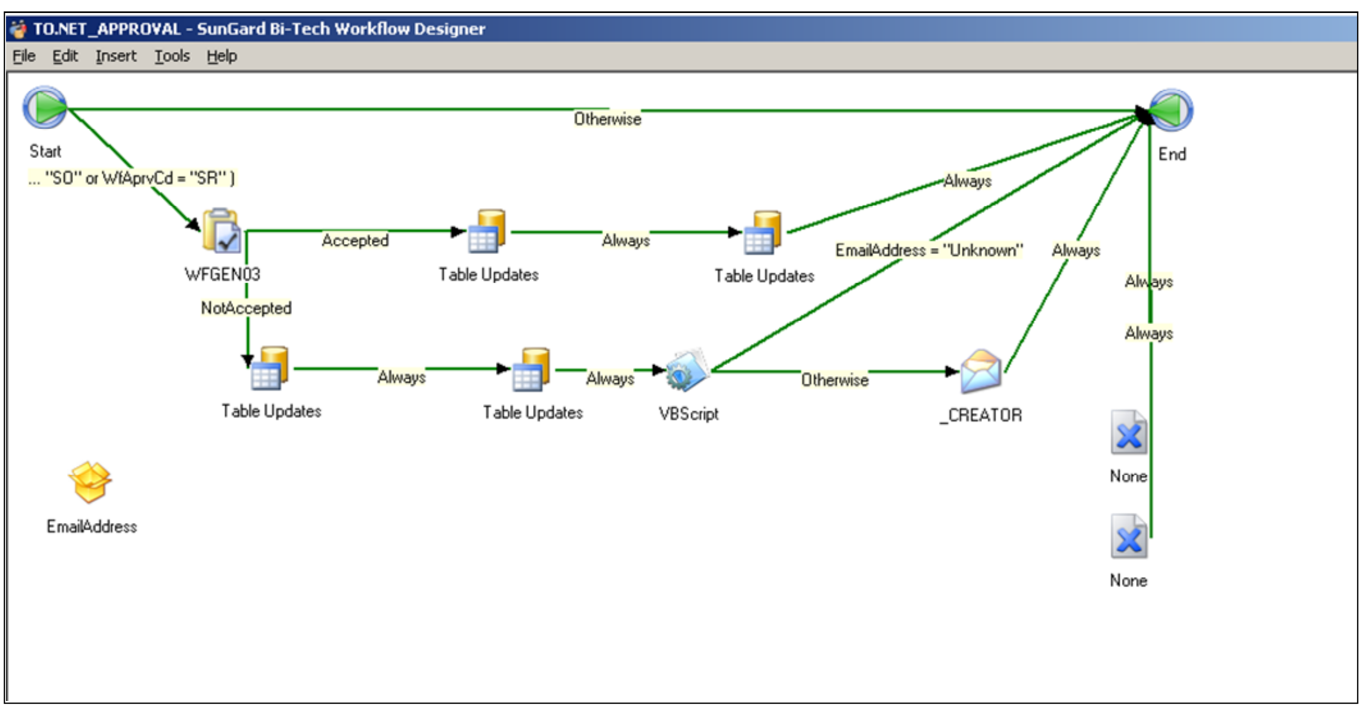
Note: If this model has not been loaded

Click **File**

Click **Import**

Select your workflow file: **TO.NET_APPROVAL.wdl**

2. The workflow model should look something like this:

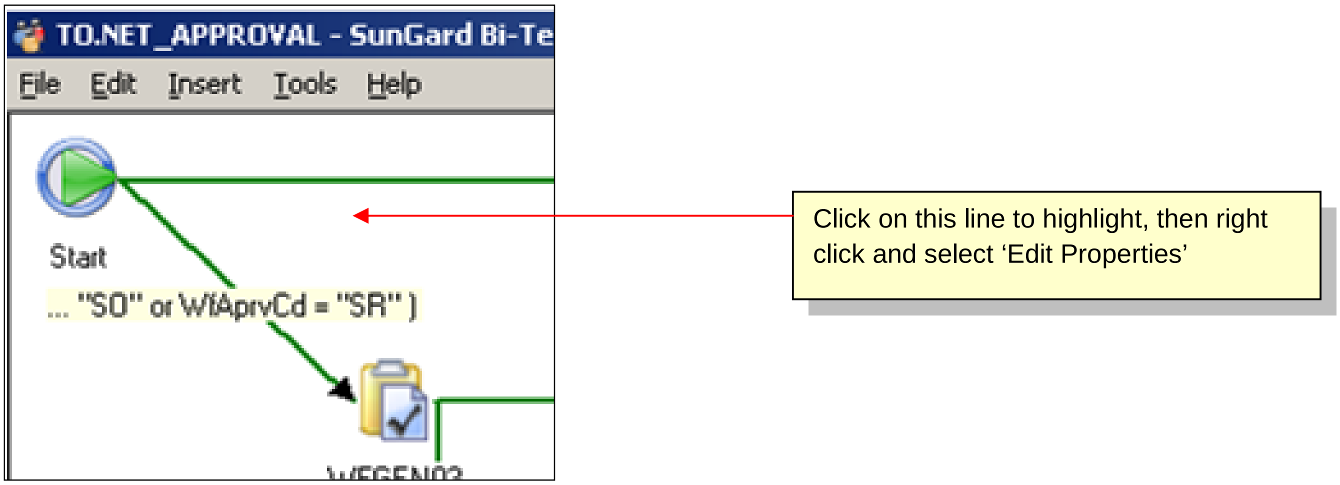


3. Adjust the standard workflow model for testing

Remove ‘**SUPER1**’ criteria from first transition

Click on **green line** pointing to the **clipboard** to highlight it.

Right-Click on **highlighted green line**

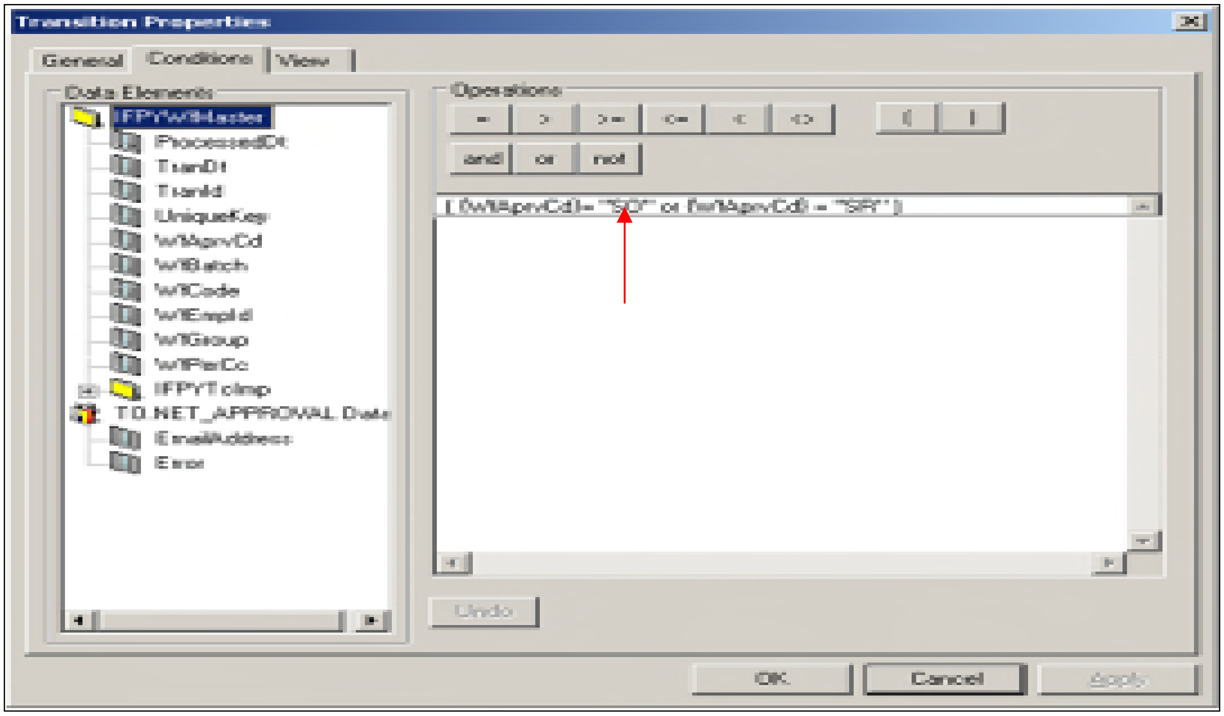


Select ‘**Edit Properties**’.

This will bring up a **Transition Properties** window.

Click the **Conditions** tab

Remove the portion of code that says ‘**and wfcode = “SUPER01**”’ so it looks like the example below:

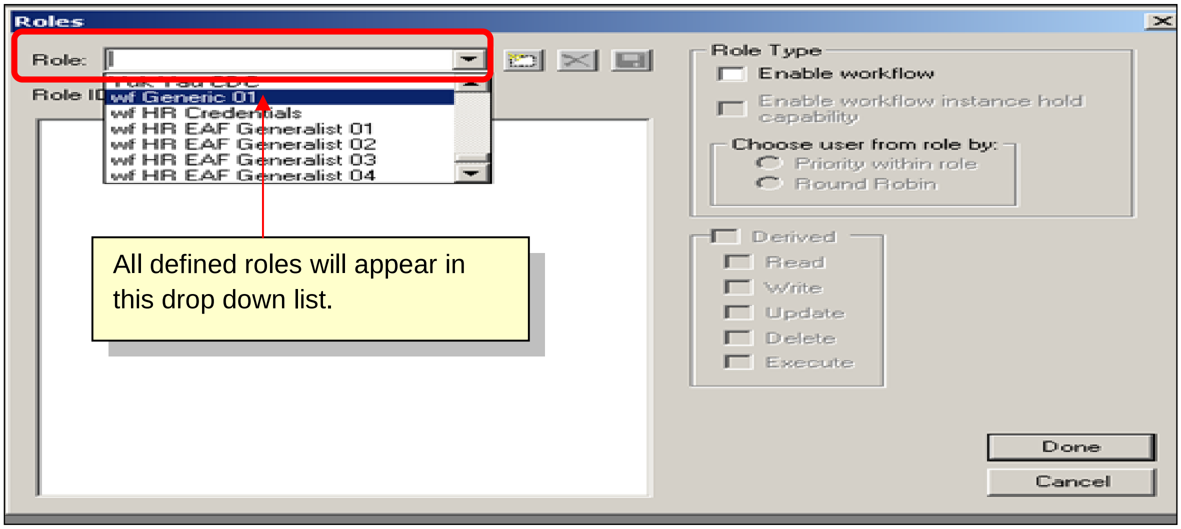


Click ‘**OK**’ to save the changes.

Modify the **WF Role for the approver** (optional)

- The standard workflow model for Timecard Online uses the **WF Role** of **wf_generic_01** as the approver role.
  - Verify this role is already defined

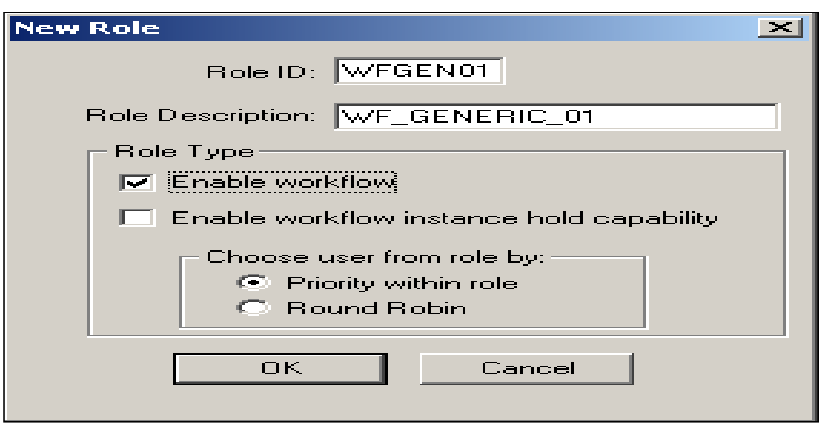
- Log in to **System Administrator**.
- Click on **Security**
- Click on **Roles** to display the existing Work Flow roles.
- Verify that the role **wf_generic_01** is defined.
    - If not, you will need to create it.



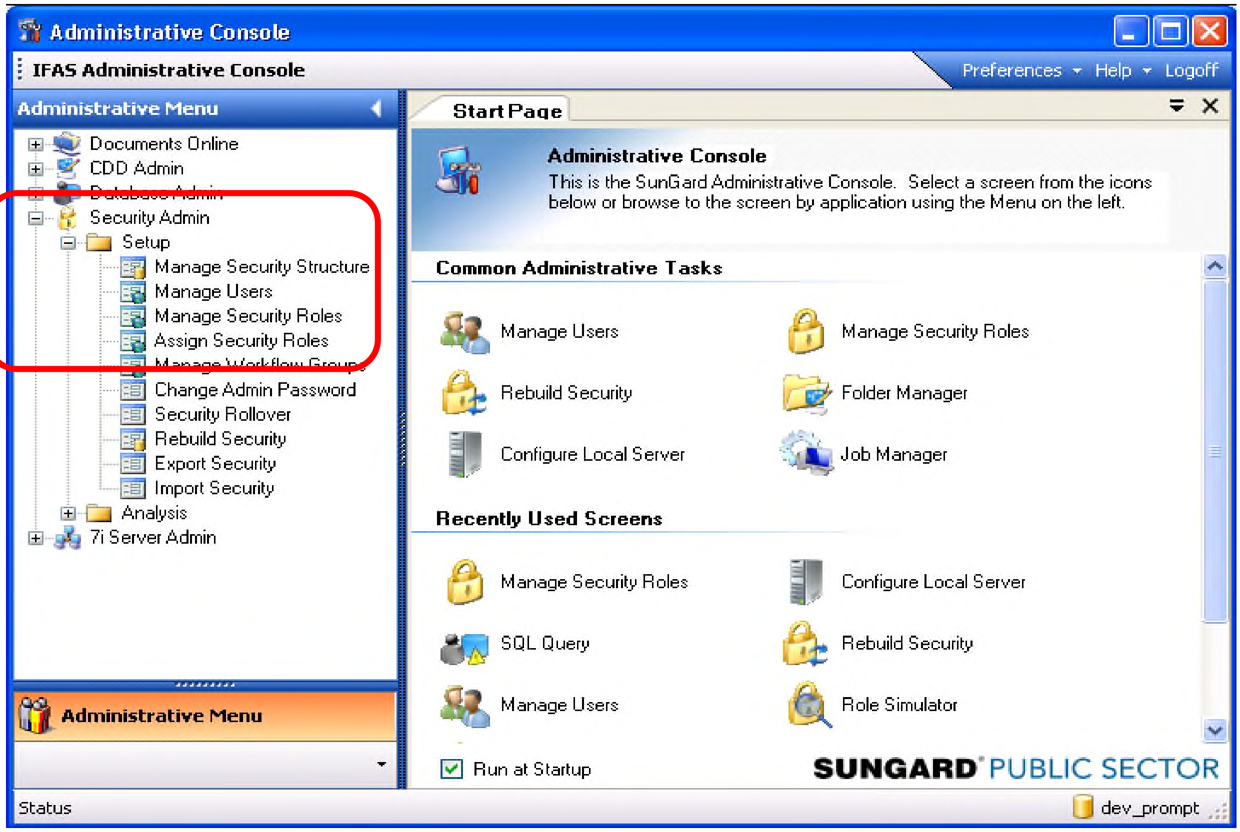
- Create a new role if this role is assigned to several users or does not exist.

In the **Roles window**, click on the **paper button** to add a new record. This will bring up the **New Role window**:

- Enter the **Role ID** and **Role Description**. The Role Description is what appears in the drop down list in the Roles window.
- Click '**Enable Workflow**'
- Choose '**Priority within role**'
- Click '**OK**' to save.
- Click the **Save button** in the Roles Window
- Click **Done** to exit.



- In <u>**Administrative Console**</u>, verify that your user is assigned to the **WF_GENERIC_01** role (or the one you just created).

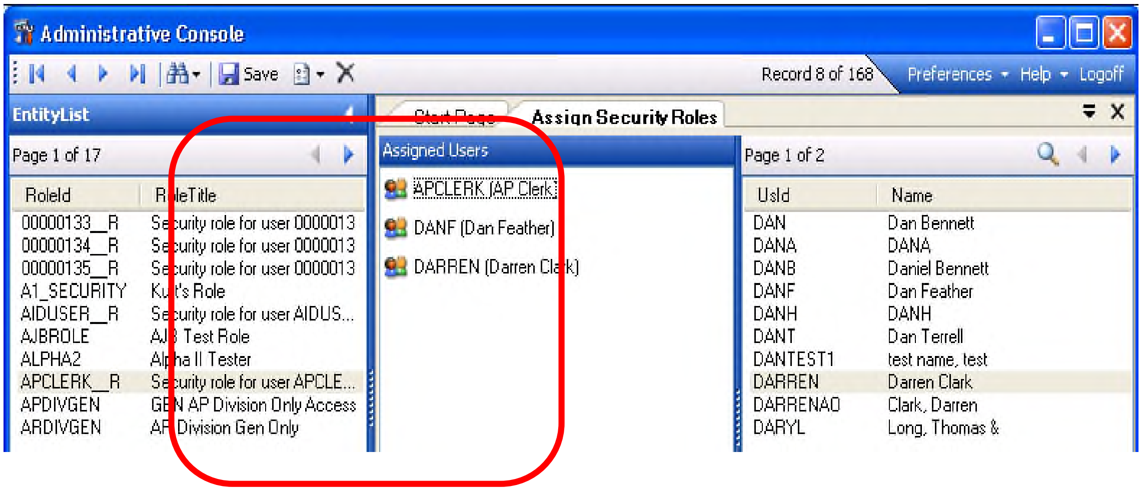


Double Click **Security Admin**

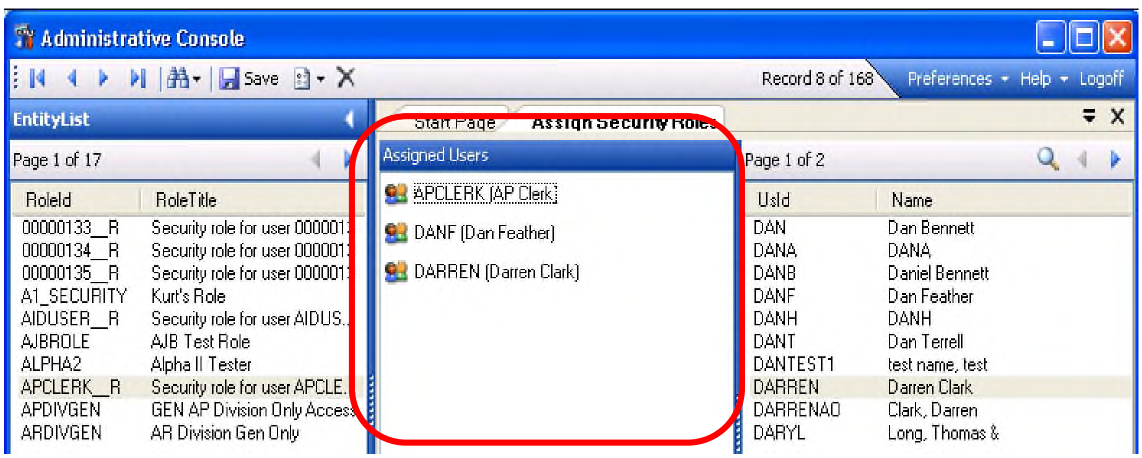
Double Click **Setup**

Double Click **Assign Security Roles**

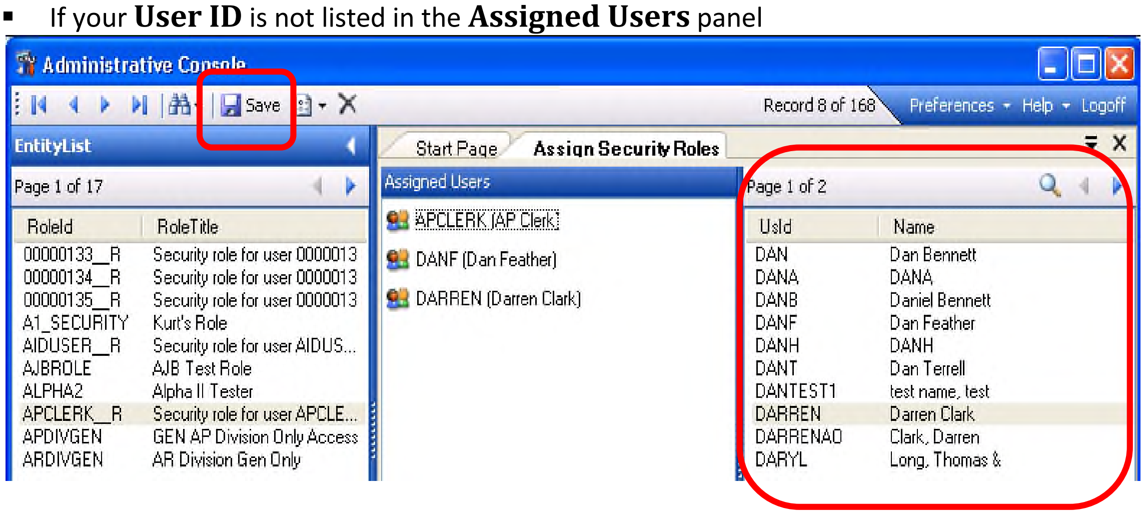
The **Assign Security Roles** window will open.



- Select **your role name** from the **Entity List** panel.



- If your **User ID** is not listed in the **Assigned Users** panel



Double Click your **User ID** from the available users list at the right.

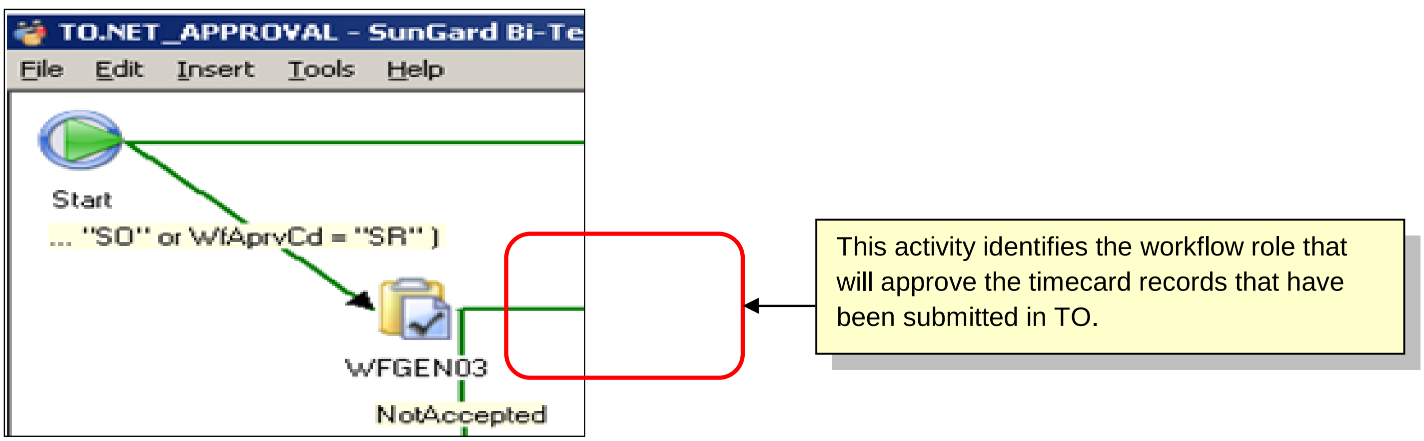
Your **User ID** will be moved the **Assigned Users** panel.

Click **Save icon** to save.

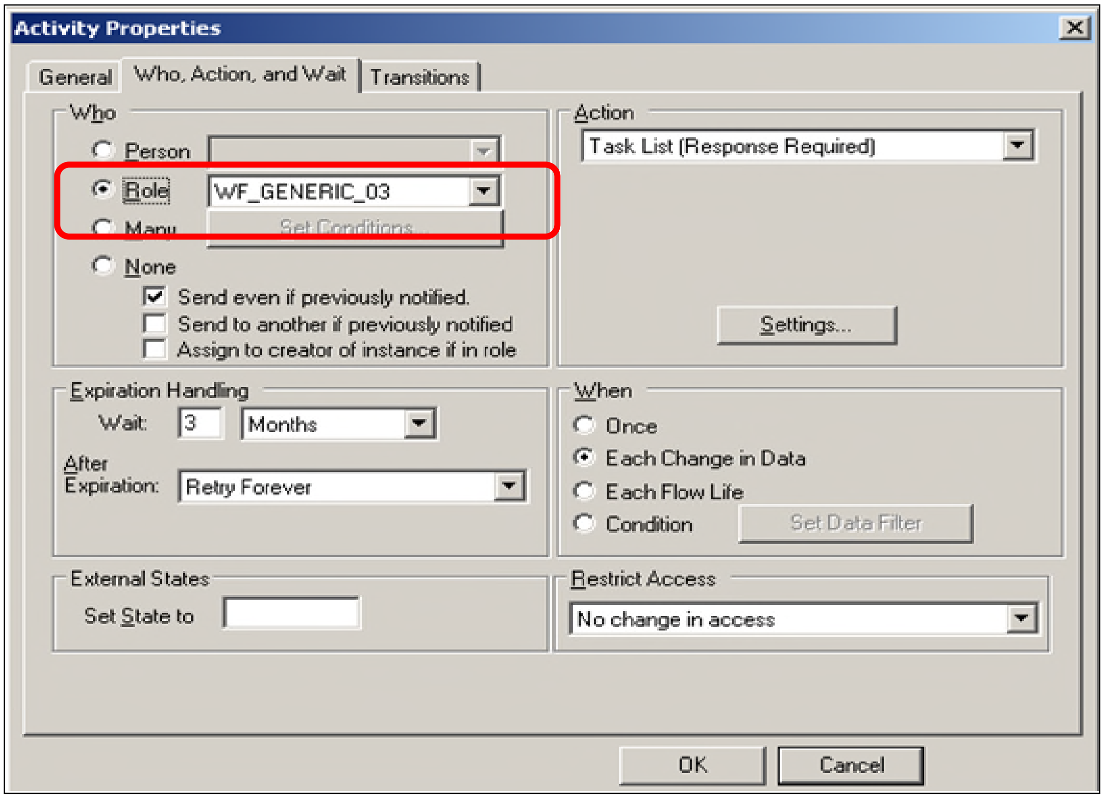
- In **SPSONE**, Rebuild Security.

If you created a new **Workflow Role ID** you will need to change the **Role ID** in the first activity of the TO Workflow model.

Click on the **clipboard icon** (should say **WFGEN01** underneath (if the standard model) to display the **Activity Properties**



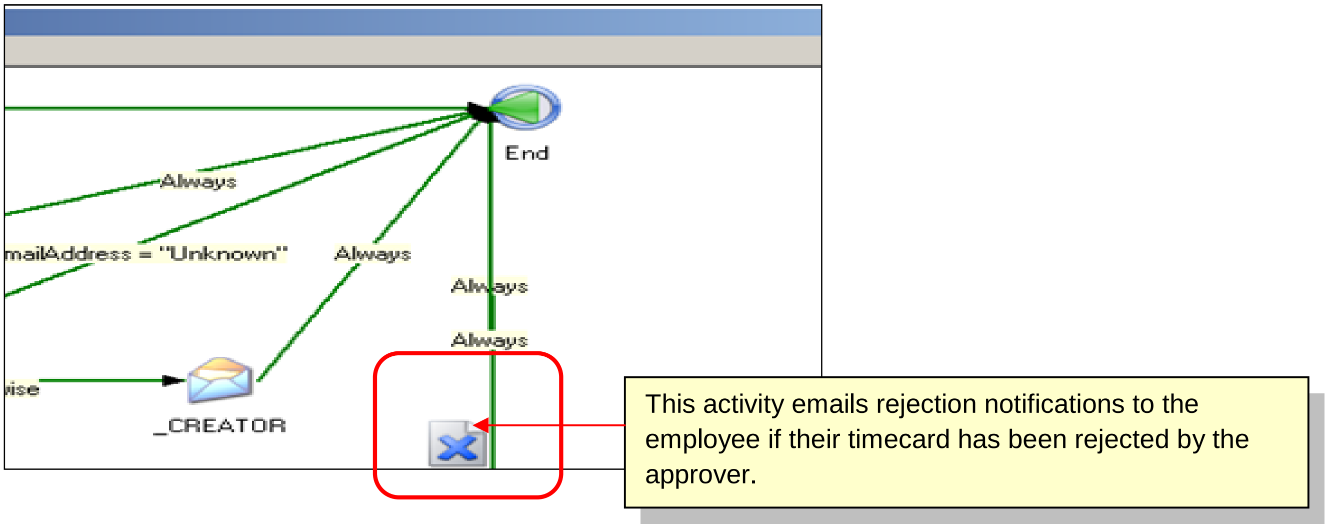
Change the Role in the 'Who' section in the Activity Properties window to the one you just created.



Click OK to Save

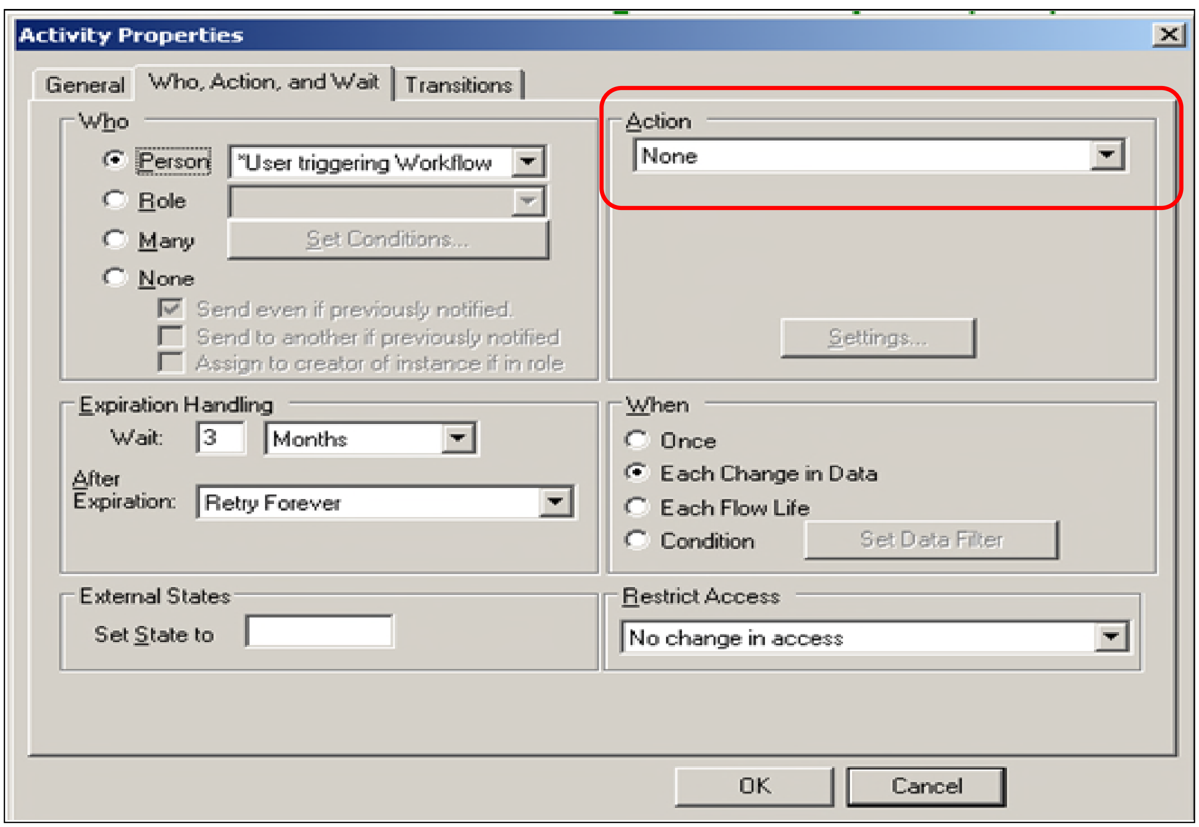
Disable email notifications in **CREATOR** to avoid accidently emailing rejection notices to employees while testing

Click on **envelope icon** that says **_CREATOR** to display the **Activity Properties** window.



Change the **Action** to '**None**'.

Click '**OK**' to save.



Note: This will change your **_CREATOR** icon from an envelope to a piece of paper with a **blue X on it.**

4. Save the workflow model

Click **File**

Click **Save**.

23. PAYROLL INTERFACE

Setup common code (**NUUPCD**) with **Code Category** = **PYFG** and **Code Value** = **PY970C**.

Associated Code 1 .

- Set to **DAILY-PYTC** if the target table is **pytc_hrs_dtl**.

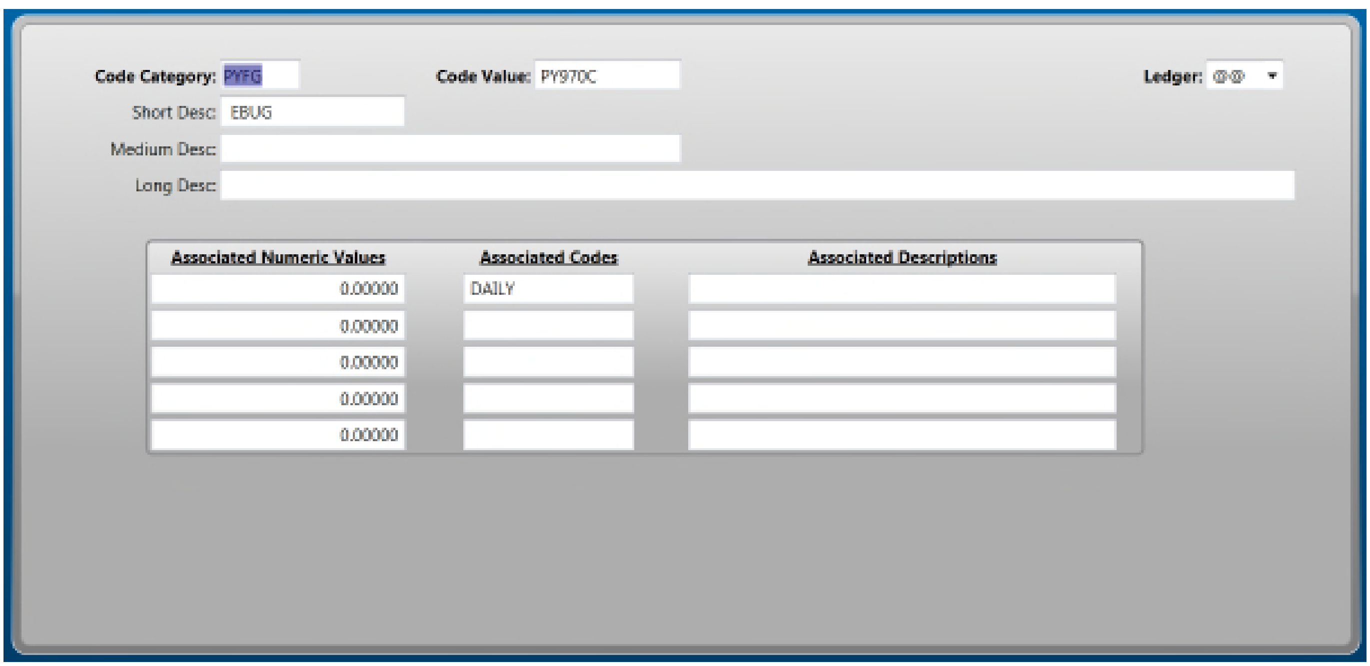
Associated Code 5

- Set to **SPLIT-MATCH**

Associated Description 5

- Set to **XXX** to indicate the **Payroll Interface Utility** should match on **Position**, **Pay Class** and **Step** (most common setup).

Please see the Common Code Guide for more information on setup options.



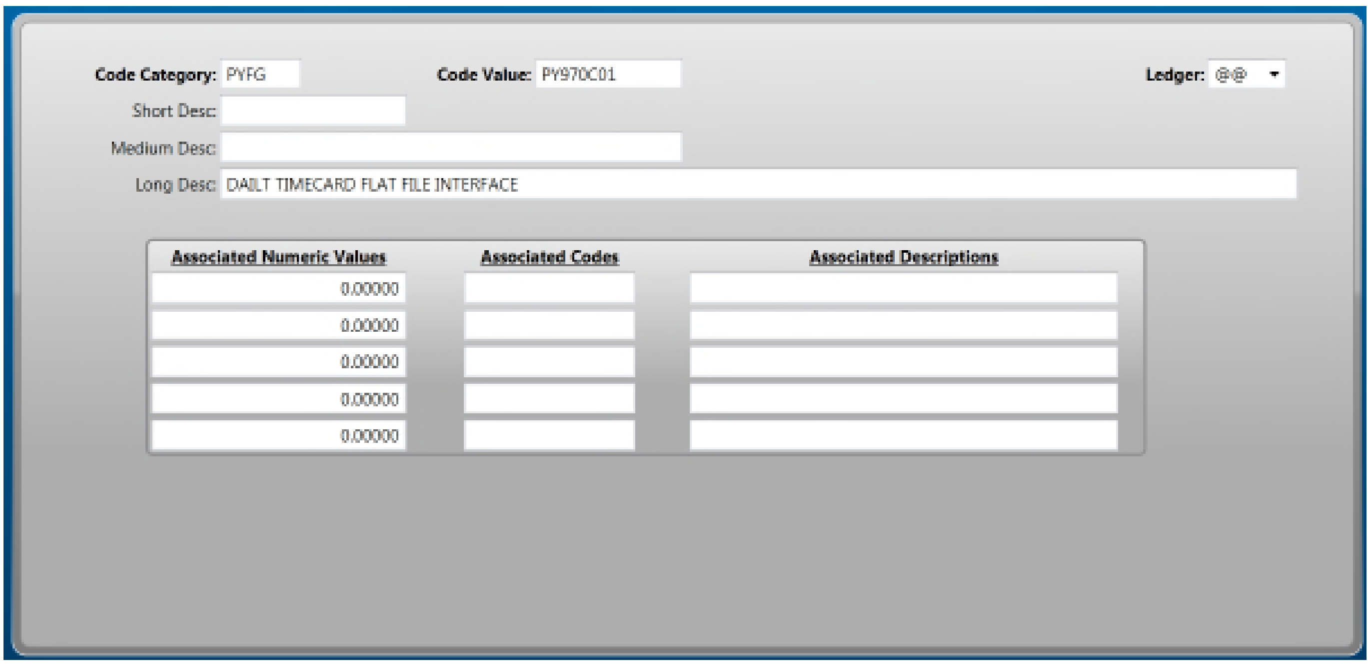
Setup common code (**NUUPCD**) with **Code Category** = **PYFG** and **Code Value** = **PY970C01**.

Associated Description 3

Set to **USE APPROVAL CODES** if the interface should only process records with the **Workflow Status** = "**A**" (approved).

Note: During the preliminary setup, this should NOT be set as the workflow setup is not normally completed until later in the project.

See the common code guide for more information on setup options.



Run the **Timecard Online to Payroll Interface** (**PYTCIFPY**) in live mode.

TIME ENTRY: Employee/Timekeeper enters **time worked** and/or **leave time** in the Timecard Screen and **SAVES**.

1. Process Standard CDD: **PY Timecard Batch Proof (IFPY)** to check report
2. Process **PYTCIFPT** – to run import in trial mode. Check for errors.
3. Process **PYTCIFPY** – to import TO records to PYT
4. Process CDD report to check records in **PYTC_HRS_DTL**
5. Process **PYTCDTCP, Time Online Import Utility**.
6. Process Standard CDD: **PY0020 Timecard Batch Proof (PYT)** to check report
7. Process **PYTCDTUB, Create/Update Daily Timecard Batch** to verify records *(optional)*
8. Process **PYTCDTCP, Payroll Import**
9. Process **PYTCDTDS, Distribute TO batch(es)**

10. Process **PYPAFC , Force Calc**
11. Process **PYREEL, Employee Prelist**

Section 8: Professional Development User Manual - Participant

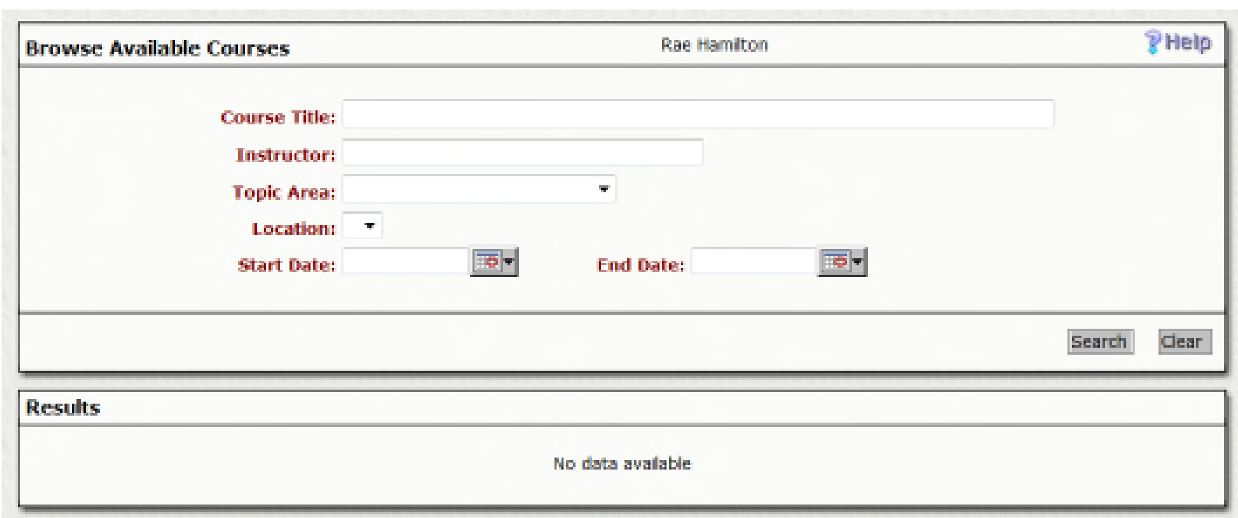
1. Enter User Name and Password

2. Select Login

3. As a Participant, you will see the following options on your menu:

4. The Home Link will take you back to the welcome message that you receive when logging into Professional Development

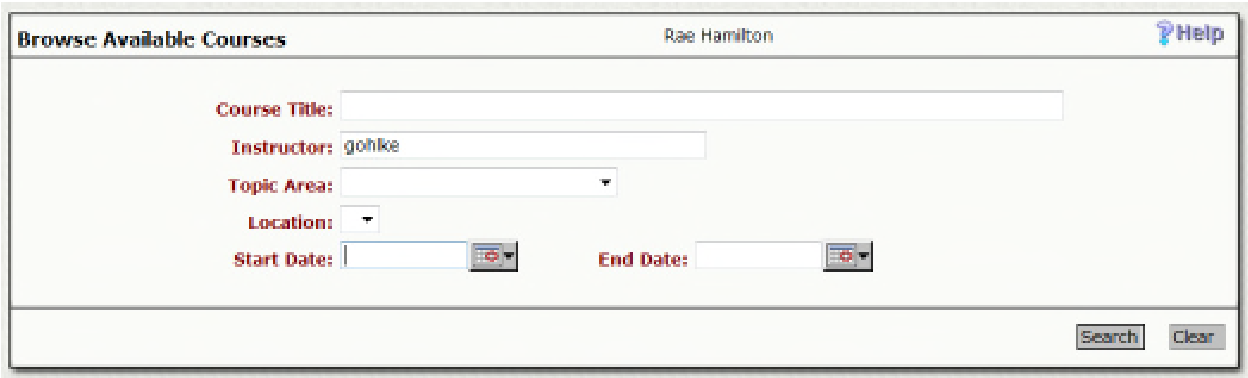
5. Select Browse Courses to view the courses that are currently available for you to register for.



You may search for courses by any or combination of search criteria:

- Course Title
- Instructor
- Topic Area
- Location
- Dates

Once your search criteria is entered, select Search



A list of available courses will now appear under Results

Results

Course Title	Start/End Date	Location	Instructor	Credits	Min	Max	Current
PROFESSIONAL DEVELOPMENT TRAINING	5/26/2011 - 5/27/2011		MARY GOHLKE	0.0	1	1	1
CRIME SCENE TRAINING	9/26/2011 - 9/26/2011		MARY GOHLKE	0.0	0	100	1
COMPUTER TRAINING	11/2/2011 - 11/2/2011		MARY GOHLKE	0.0	0	100	0
HOSTAGE	12/31/2011 - 1/5/2012		MARY GOHLKE	0.0	0	5	0

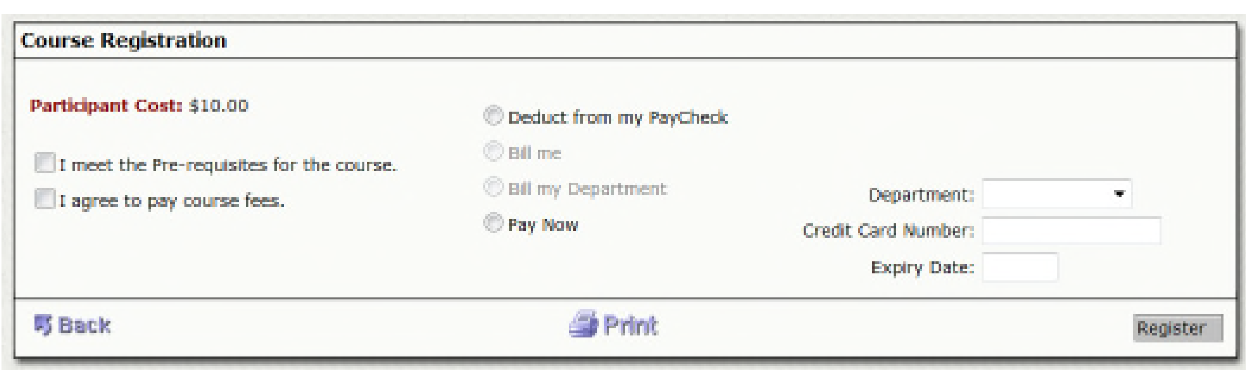
1

To view more information and possibly register for a course, select the Course Title

Course Information
Rae Hamilton
Help

Course Title: PROFESSIONAL DEVELOPMENT TRAINING
Description: OVERVIEW OF PD
Course Duration: 5/26/2011 - 5/27/2011
Schedule: THURSDAY AND FRIDAY
Instructor: MARY GOHLKE
Syllabus:
Location:
Min Participants: 1
Current Count: 1
Room:
Max Participants: 1
Seat Hours: 0.0
Materials: COMPUTER, PROJECTOR, PHONE
Credits: 0.0
Credits Date: 1/1/0001

After reviewing the details about the course, you have the option to register for the course

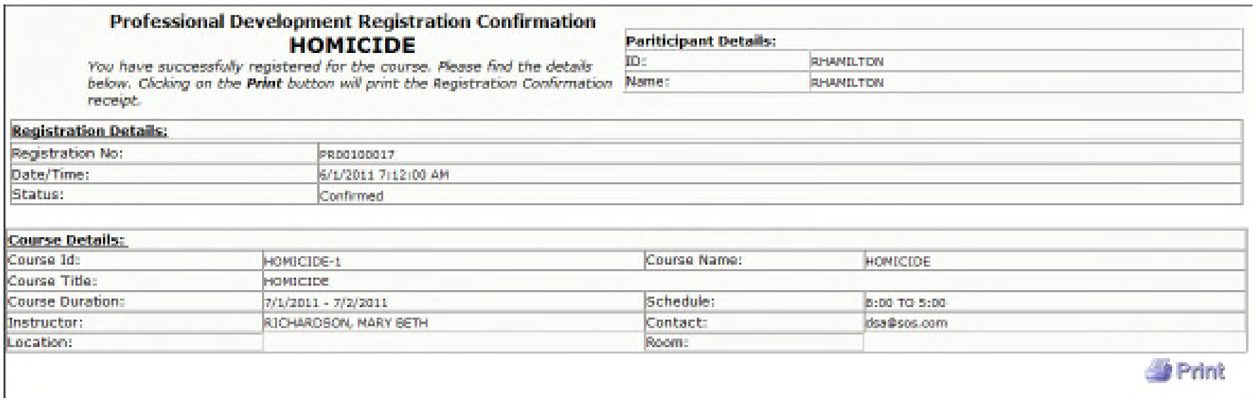


First, you must agree that you met the pre-requisites required to take this course

If there is a cost associated with the course, you must agree to pay and choose how you will pay for the course

Next select Register

You will now see a confirmation that you were either registered for the course or put on the wait list of the max enrollment has already been met.


Professional Development Registration Confirmation

HOMICIDE

You have successfully registered for the course. Please find the details below. Clicking on the ***Print*** *button will print the Registration Confirmation receipt.*

Pariticipant Details:	
ID:	RHAMILTON
Name:	RHAMILTON

Registration Details:	
Registration No:	PR00100017
Date/Time:	6/1/2011 7:12:00 AM
Status:	Confirmed

Course Details:			
Course Id:	HOMICIDE-1	Course Name:	HOMICIDE
Course Title:	HOMICIDE		
Course Duration:	7/1/2011 - 7/2/2011	Schedule:	8:00 TO 5:00
Instructor:	RICHARDSON, MARY BETH	Contact:	dsa@sos.com
Location:		Room:	

Print

You will also receive an e-mail confirmation.


From: rdwf@sungardps.com
To: Rae Hamilton (SunGard-Chico)
Cc:
Subject: Professional Development Course Registration
Sent: Wed 6/1/2011 7:14 AM

Hello RAE HAMILTON,

You have successfully registered for the Professional Development course. Course details are as follows:

Course Id: HOMICIDE-1
Course Name: HOMICIDE
Course Title: HOMICIDE

Registration No: PR00100017
Registration Status: Confirmed

Class Date/Time Details:

Start Date Time   Duration

3/1/2009 8:00:00 AM   8 mins

Thank you,

6. Select Current Enrollment to review which courses you are currently registered for

For more detail information on the courses, select the course name

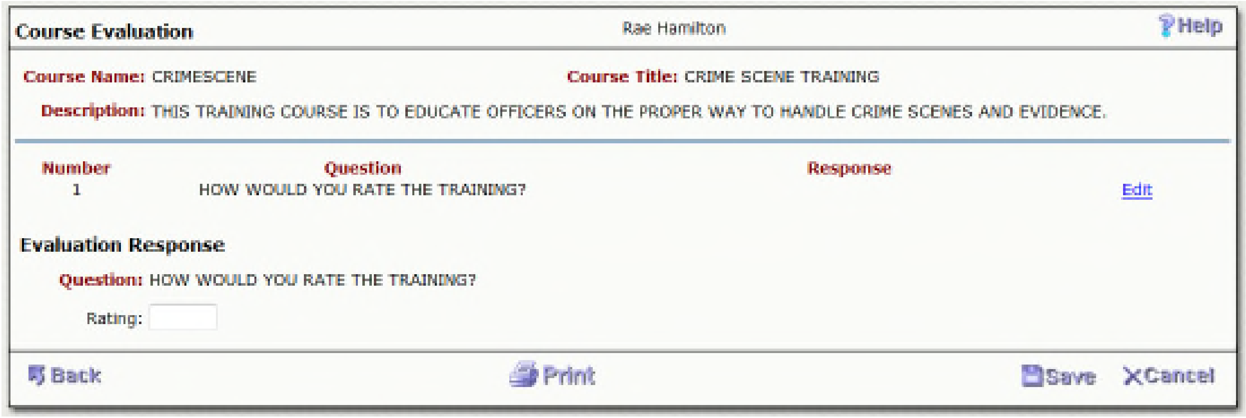
To see a list of what other courses one of your instructors is currently or is assigned to be teaching as well as previous courses taught, select the instructor name.

To view more details about each course, select the course name

To get back to your current courses, select Back

If the course was set up with evaluation questions, you will have a link that will take you to the questions when selecting.

Once you have completed the course, be sure to answer the questions.



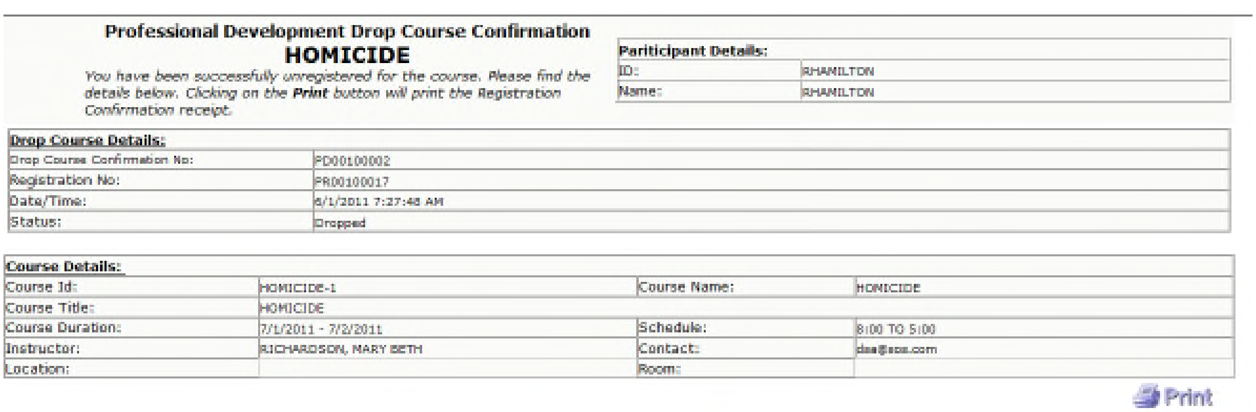
Enter your response and select Save

If you decide to drop the course, you have an option to drop course next to each course you are currently registered for.

Select Drop Course, this will open up the detailed information for the course as well as an option to drop.

Confirm that you are dropping the course and select Drop Course.

A confirmation will appear


Professional Development Drop Course Confirmation

HOMICIDE

*You have been successfully unregistered for the course. Please find the details below. Clicking on the **Print** button will print the Registration Confirmation receipt.*

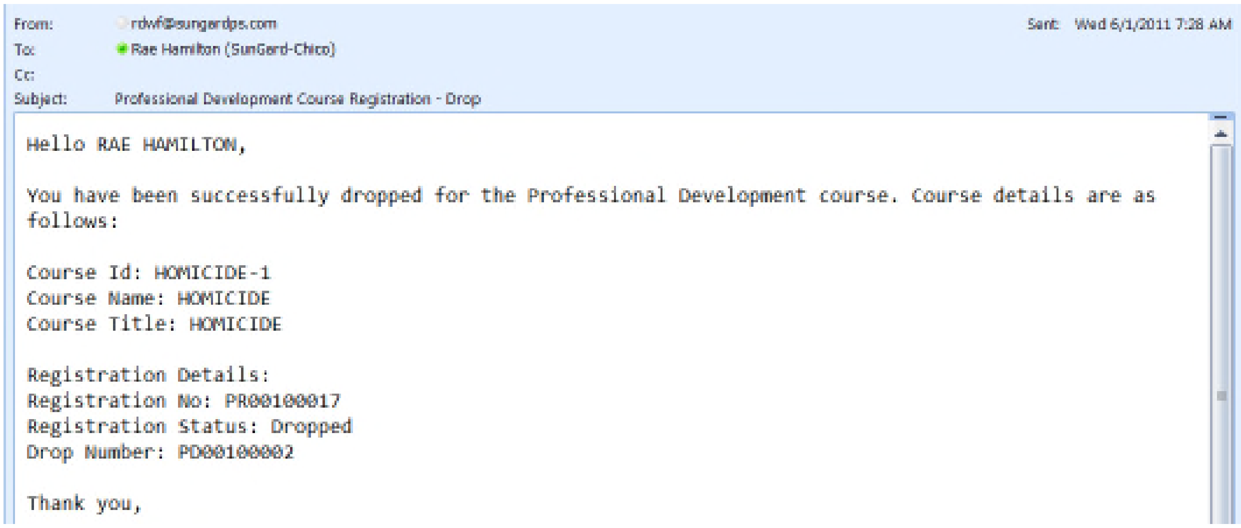
Pariticipant Details:	
ID:	RHAMILTON
Name:	RHAMILTON

Drop Course Details:	
Drop Course Confirmation No:	PD00100002
Registration No:	PR00100017
Date/Time:	6/1/2011 7:27:48 AM
Status:	Dropped

Course Details:			
Course Id:	HOMICIDE-1	Course Name:	HOMICIDE
Course Title:	HOMICIDE		
Course Duration:	7/1/2011 - 7/2/2011	Schedule:	8:00 TO 5:00
Instructor:	RICHARDSON, MARY BETH	Contact:	dss@sos.com
Location:		Room:	

Print

You will also receive an e-mail confirmation


From: rdwf@sungardps.com   Sent: Wed 6/1/2011 7:28 AM
To: Rae Hamilton (SunGard-Chico)
Cc:
Subject: Professional Development Course Registration - Drop

Hello RAE HAMILTON,

You have been successfully dropped for the Professional Development course. Course details are as follows:

Course Id: HOMICIDE-1
Course Name: HOMICIDE
Course Title: HOMICIDE

Registration Details:
Registration No: PR00100017
Registration Status: Dropped
Drop Number: PD00100002

Thank you,

Back under Current Courses, you will no longer see this course


Current Enrollment Rae Hamilton Help

Course Title	Start/End Date	Instructor		
CRIME SCENE TRAINING	9/26/2011 - 9/26/2011	MARY GOHLKE	Evaluation	Drop Course

Print

7. Select Prior Enrollment to view all of the previous courses that you have taken or recently completed.

8. Select Wait List to view any courses that already had the maximum participants when you registered. As participants drop the course, students on the wait list will automatically be registered for the course.


Wait List Rae Hamilton Help

Course Title	Start/End Date	Instructor	Capacity	List Position
PROFESSIONAL DEVELOPMENT TRAINING	5/26/2011 - 5/27/2011	MARY GOHLKE	1	1

Print

To view more information about the course, select the Course Title

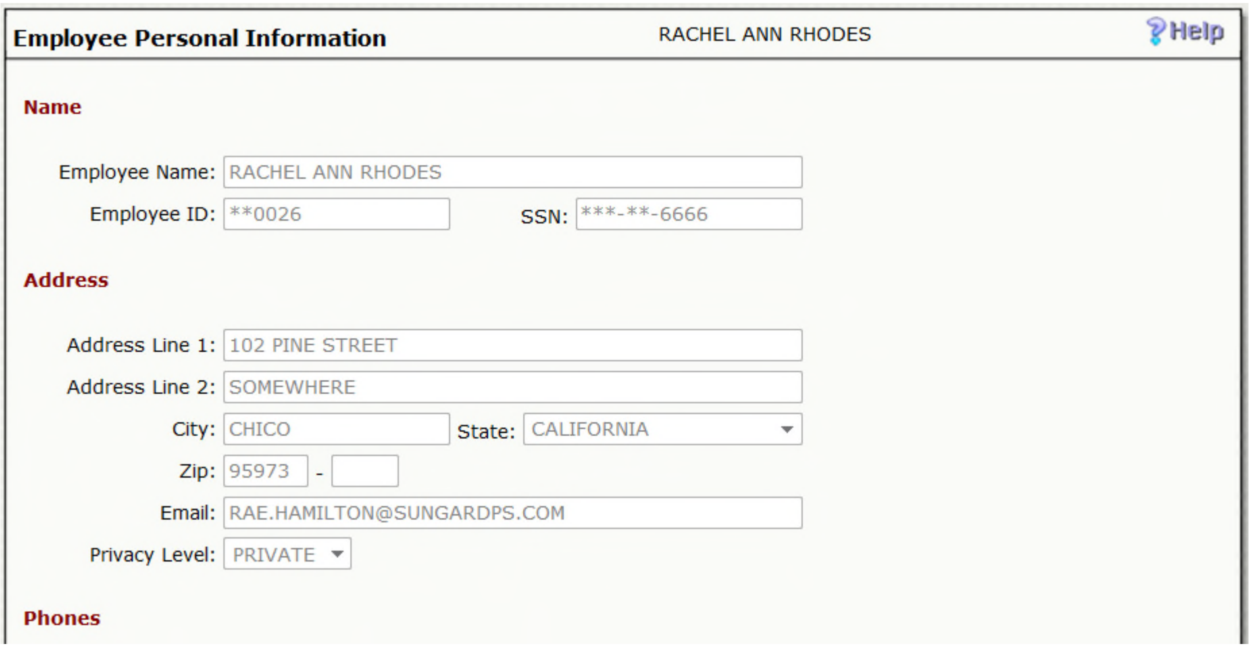
To view more information about courses taught by the instructor, select the instructor name.

The wait list will also show you how many participants are allowed as well as which number you are on the wait list

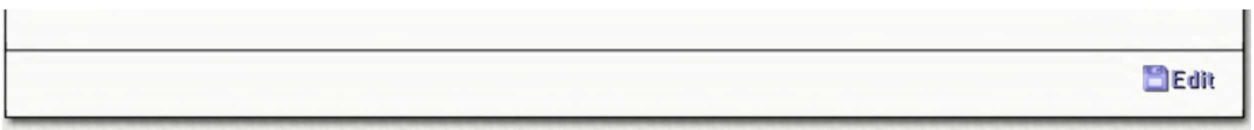
If someone were to drop this course, you would be the next in line and would automatically be registered for the course.

You would receive confirmation that you are now registered for this course.

9.Select Personal Information to update your address, phone number and/or e-mail address



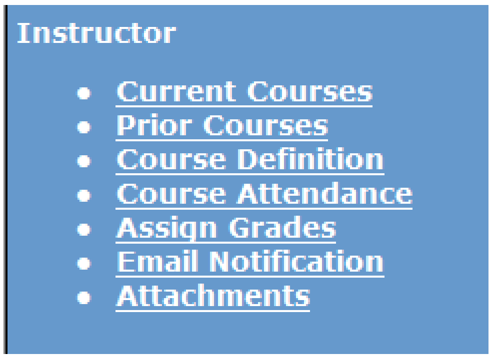
Select Edit to update your information



Update your information and select Save

Section 9: Professional Development User Manual – Instructor

1. Enter User Name and Password
2. Select Login
3. As an Instructor, you will see the following options on your menu:



Select Current Courses to view a list of all of the courses that you are currently assigned to.


Current Courses — GOHLKE, MARILYN — Help

Current Courses	Course Status	Start/End Date	Location	Min	Max	Current
CRIME SCENE TRAINING	Active	9/26/2011 - 9/26/2011		0	100	1
COMPUTER TRAINING	Active	11/2/2011 - 11/2/2011		0	100	0
HOSTAGE	Active	12/31/2011 - 1/5/2012		0	5	0

Print

Select the Course Name to view detailed information about your course as well as a list of current participants.

Select Back to go back to the list of current courses.

Select Prior Courses to view a list of all courses that you had previously taught

Prior Courses GOHLKE, MARILYN Help

Prior Courses	Course Status	Start/End Date	Location	Min	Max
FIRE ARM TRAINING LEVEL 2	Inactive	2/26/2009 - 3/2/2009		0	100
PROFESSIONAL DEVELOPMENT TRAINING	Inactive	10/29/2010 - 12/31/2010		1	1
PROFESSIONAL DEVELOPMENT TRAINING	Active	5/26/2011 - 5/27/2011		1	1

Print

Notice that Course Status is either Inactive or Active. If the course is under Prior Courses (date driven) but still active, this reflects that the Professional Development Administrator at your site has not marked the course as Inactive.

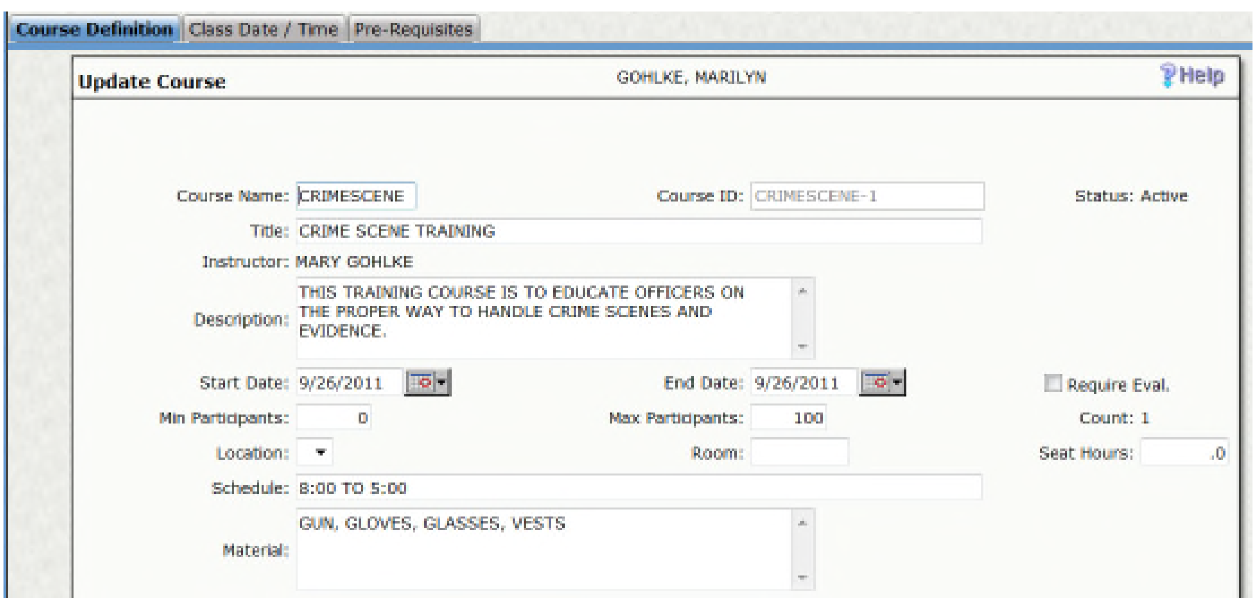
Select Course Description to update your course information or to add a new course

Course Definition GOHLKE, MARILYN Help

Current Courses	Start/End Date	Location	Current	Course Status
FIRE ARM TRAINING LEVEL 2	2/26/2009 - 3/2/2009		0	Inactive
PROFESSIONAL DEVELOPMENT TRAINING	10/29/2010 - 12/31/2010		0	Inactive
PROFESSIONAL DEVELOPMENT TRAINING	5/26/2011 - 5/27/2011		1	Active
CRIME SCENE TRAINING	9/26/2011 - 9/26/2011		1	Active
COMPUTER TRAINING	11/2/2011 - 11/2/2011		0	Active
HOSTAGE	12/31/2011 - 1/5/2012		0	Active

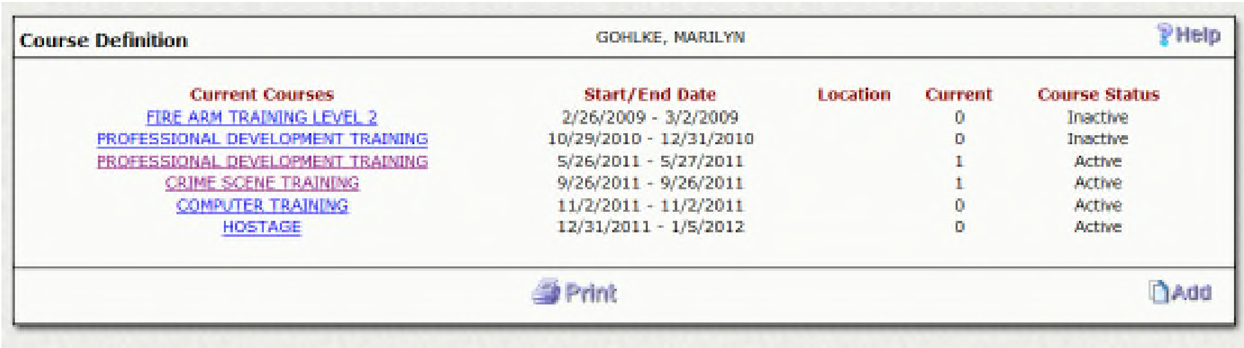
Print Add

Select a course name to update the course information

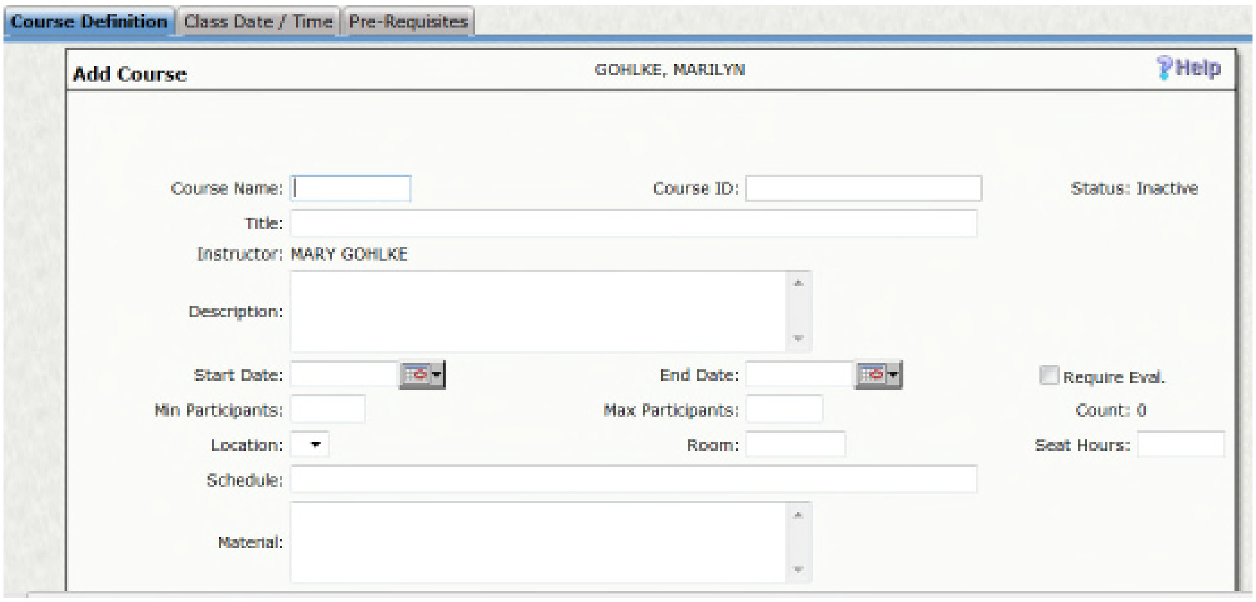


Make the appropriate changes and select Save

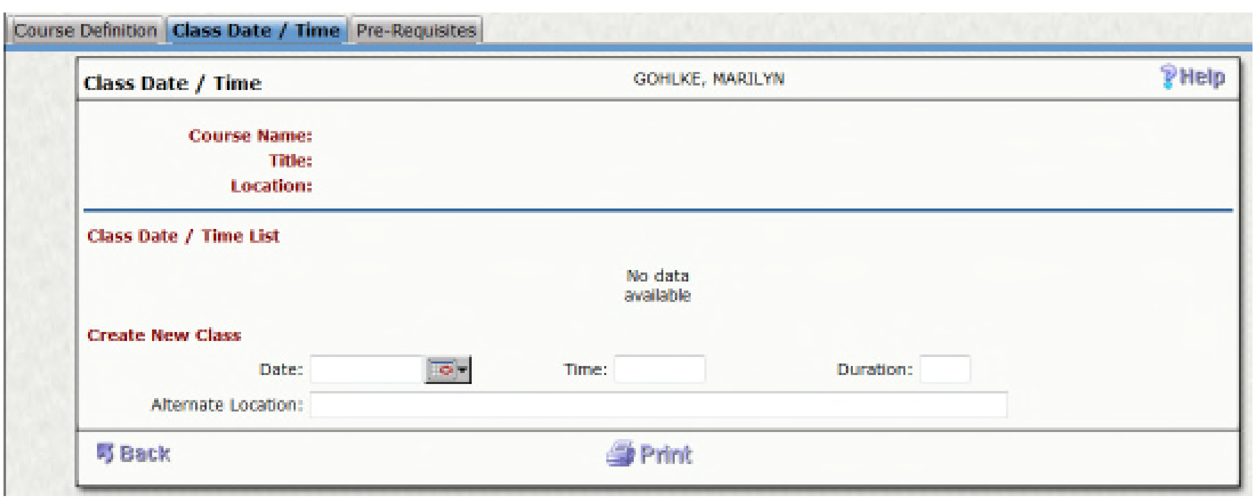
To Add a course, select Add from the front screen



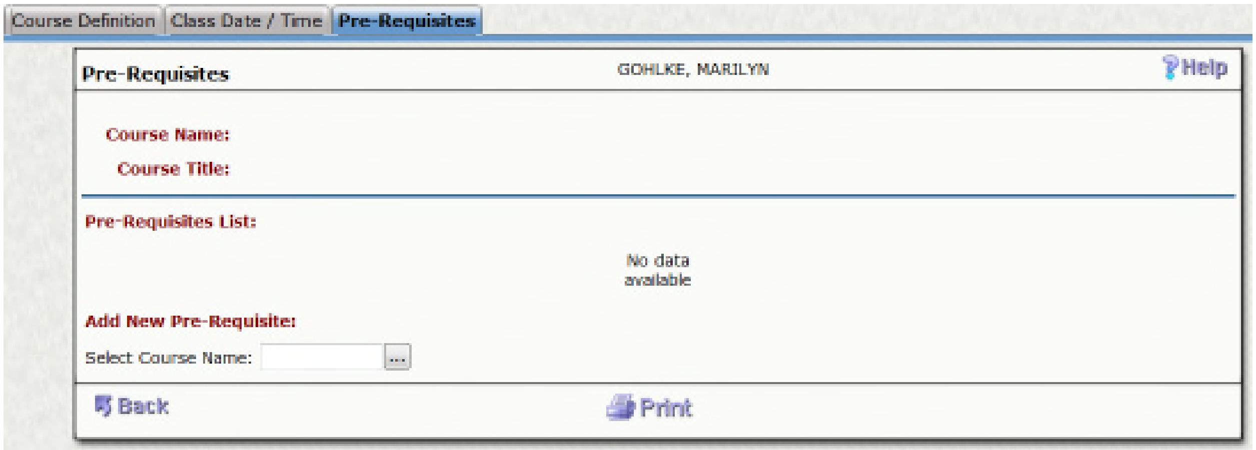
Enter the course information and select Save



Break out individual days for attendance record keeping, there must be at least one day defined for attendance to be tracked.



Last, enter the Pre-Requisites for the course if necessary

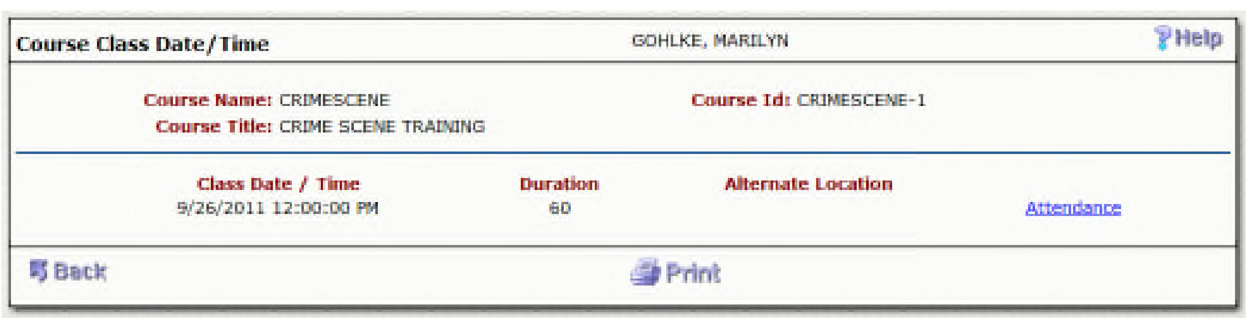


Once you are finished creating a course, the Professional Development Administrator will receive and notification and will approve the course and set it to Active. Until then, it will remain Inactive and participants will not be able to register.

Select Course Attendance to update each course with attendance

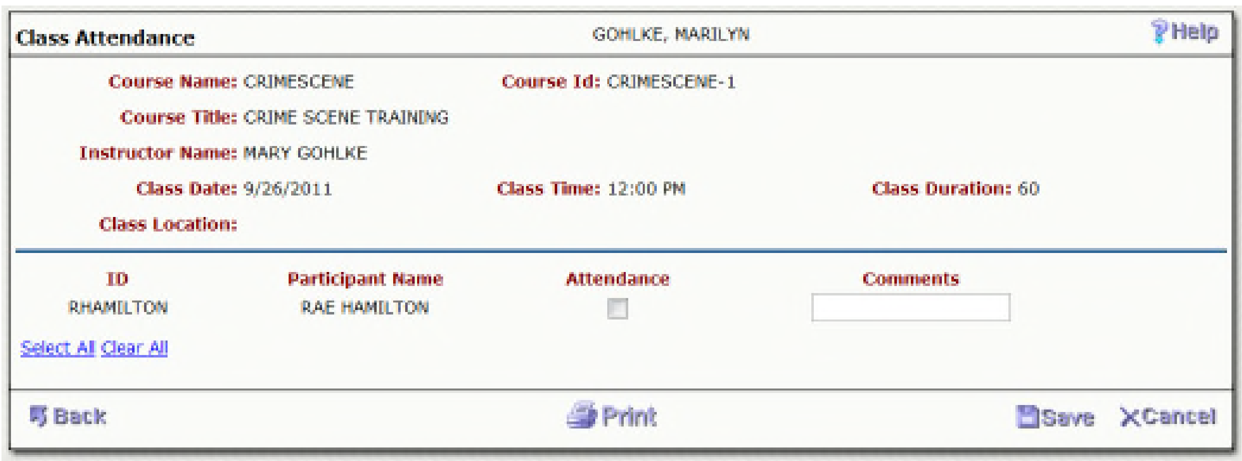
Select the Course Description for detailed information as well as a list of participants

Select the Class Date/Time to update the attendance

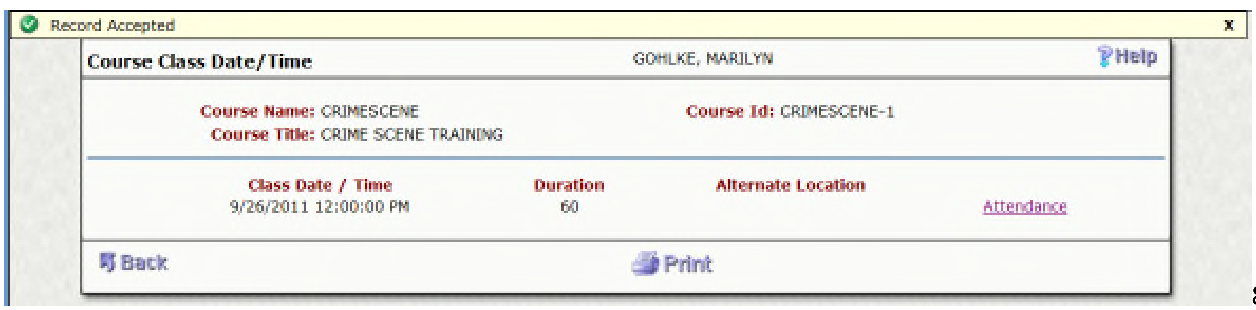


Select the appropriate day and select Attendance

Mark whether or not the participant was in attendance, you may also enter a comment



Be sure to select Save



8. Select Assign Grades once the course is completed and you are ready to grade your participants

Select Assign Grade

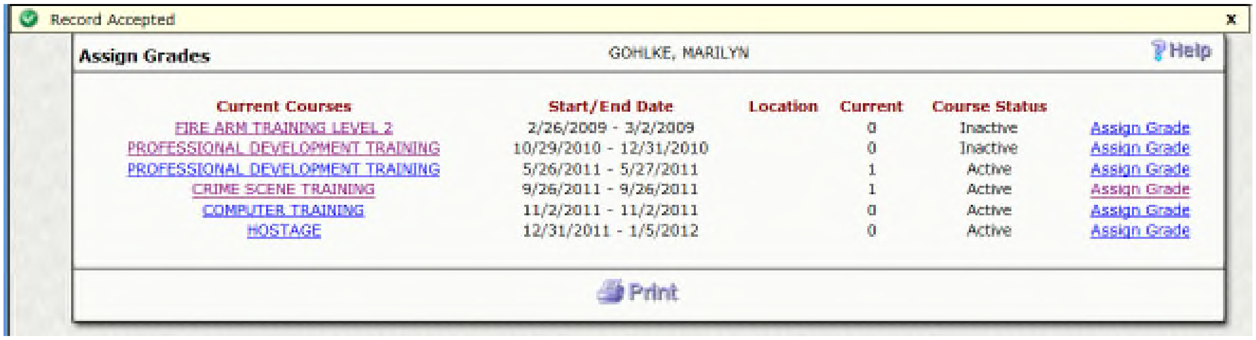
Grade Assignments — GOHLKE, MARILYN — Help

Course Name: CRIMESCENE
Course Title: CRIME SCENE TRAINING
Course Id: CRIMESCENE-1

Participant ID	Participant Name	Assign Grade
RHAMILTON	RAE HAMILTON	

Back Print Save Cancel

Enter the appropriate grade and select Save



Record Accepted

Assign Grades — GOHLKE, MARILYN — Help

Current Courses	Start/End Date	Location	Current	Course Status	
FIRE ARM TRAINING LEVEL 2	2/26/2009 - 3/2/2009		0	Inactive	Assign Grade
PROFESSIONAL DEVELOPMENT TRAINING	10/29/2010 - 12/31/2010		0	Inactive	Assign Grade
PROFESSIONAL DEVELOPMENT TRAINING	5/26/2011 - 5/27/2011		1	Active	Assign Grade
CRIME SCENE TRAINING	9/26/2011 - 9/26/2011		1	Active	Assign Grade
COMPUTER TRAINING	11/2/2011 - 11/2/2011		0	Active	Assign Grade
HOSTAGE	12/31/2011 - 1/5/2012		0	Active	Assign Grade

Print

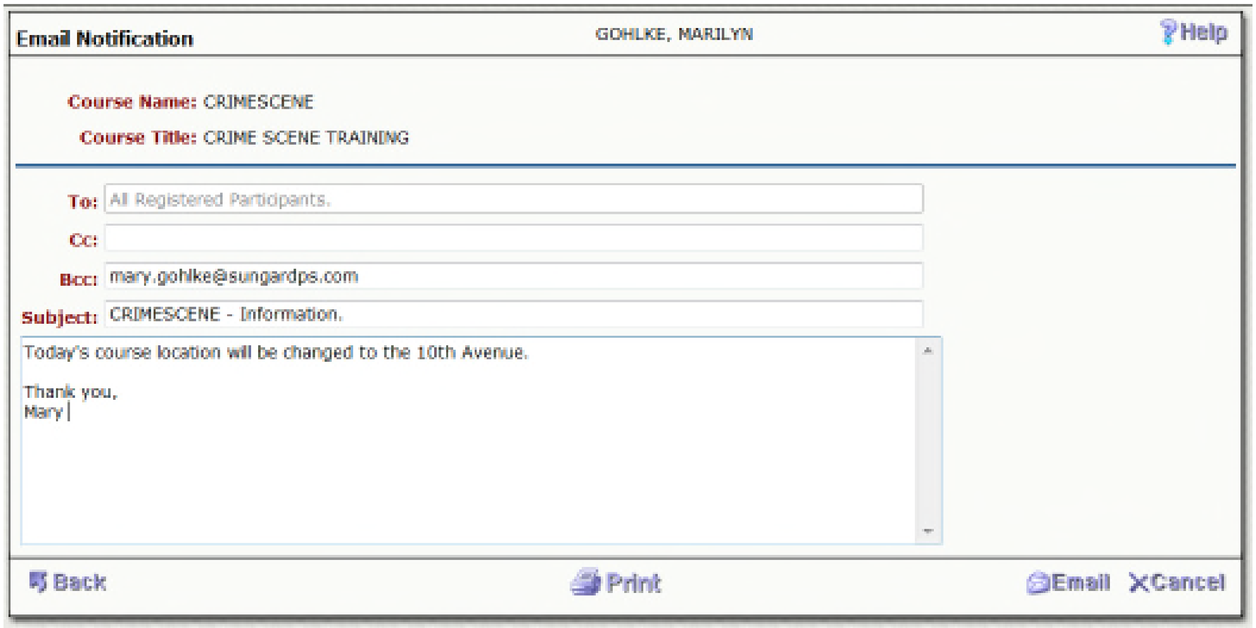
9.Select E-mail notifications if you need to send out an e-mail to everyone in your course.

Course Email Notification — GOHLKE, MARILYN — Help

Current Courses	Start/End Date	Location	Current	Course Status	
FIRE ARM TRAINING LEVEL 2	2/26/2009 - 3/2/2009		0	Inactive	Email Notification
PROFESSIONAL DEVELOPMENT TRAINING	10/29/2010 - 12/31/2010		0	Inactive	Email Notification
PROFESSIONAL DEVELOPMENT TRAINING	5/26/2011 - 5/27/2011		1	Active	Email Notification
CRIME SCENE TRAINING	9/26/2011 - 9/26/2011		1	Active	Email Notification
COMPUTER TRAINING	11/2/2011 - 11/2/2011		0	Active	Email Notification
HOSTAGE	12/31/2011 - 1/5/2012		0	Active	Email Notification

Print

Select Email Notification for the course that you would like to e-mail all participants



Enter your message and select Email

All participants in this course will then receive the e-mail notification.

10.Select Attachments to attach syllabus or any other documents relevant to your courses.

Enter a description

Select Browse which will allow you to select the file from your computer

Select Add


Document Attachments
GOHLKE, MARILYN
Help
Description
Type
Delete
Course Description
PEATTACH
Delete
Syllabus
PEATTACH
Delete
Add Attachment
Description:
Attachment Type:
Attach to PE record
Local File:
Browse...
Print
Add
Cancel

Section 10: Professional Development Set Up

Overview

Professional Development is used to create and manage staff education programs via the web. Once course detail is setup, end users enjoy 24x7 access to registration, class schedules, a personal record of completed coursework.

Purpose

Automating these tasks reduces your organization's administrative burden immediately. In addition to creating organization efficiency, Professional Development promotes and facilitates an increasingly educated workforce within your organization. Along with staff participation, an optional feature allows nonemployees to register and participate in all scheduled courses. Access to information is straightforward and easy. Professional Development (PD) includes standard reports and immediate online inquiry to any data in the system. Security-protected reports can be run at the user's networked computer or via the Internet from selected Web browsers.

Objectives

- Instructor's View
- Participant's View
- Professional Development Administrator's View
- Course Setup
- System Setup
- User Setup

Key Features

Professional Development features the ability to:

Allow instructors to define course information and associated class data including course code, description, class size, location, instructor, facilitator, required materials, prerequisites, etc from the web.

Allow instructors to track participant attendance online.

Option to collect participant feedback through a class/instructor evaluation questionnaire.

Participants can view class schedules online.

Participants can drop existing classes and/or register for new classes.

Instructor's View

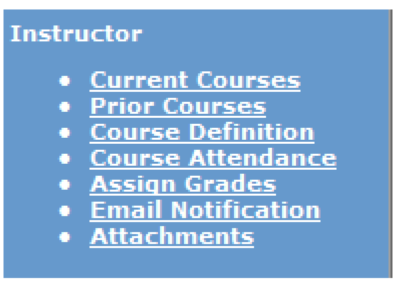
An instructor can create courses that should be offered for registration as well as maintain class attendance and assign grades. This process can be done from the web or within IFAS, HRPDUPCD (Human Resources + Professional Development + Update PD Databases + Course Definitions). The courses will commonly be created from the web and approved within HRPDUPCD. You must at least fill out the required information. All bold fields are required.

Go to http://<server>/finance/ProfDev

When creating a new course, you must log into the Professional Development Module from the web.

Instructor's Menu

If a user is marked as an instructor, they will have seven screen options.



Current Courses

Current Courses will list all courses that are open for enrollment that are being taught by you, the instructor.

Selecting the course name will give the course definition. This area reflects the information that was entered on the Course Definition screen.

Within this screen, you will be able to view each class associated with the course independently.


Course Information Mary Gohlke Help

Course Title: CHEMICAL SAFETY
Description: THIS TRAINING IS DESIGNED TO EDUCATION ON THE PROPER WAY TO HANDLE CHEMICAL SPILLS.
Course Duration: 1/1/2009 - 4/2/2009 **Schedule:** 8:00 - 5:00
Instructor: MARY **Syllabus:**

Location: **Min Participants:** 0 **Current Count:** 0
Room: **Max Participants:** 100
Seat Hours: 0.0

Materials: GLOVES **Credits:** 0.0 **Credits Date:** 1/1/0001

Pre-Requisites
No data available

Topic Area

Area Code	Area Description
PBLIC WK	PUBLIC WORKS

Requirements Met
No data available

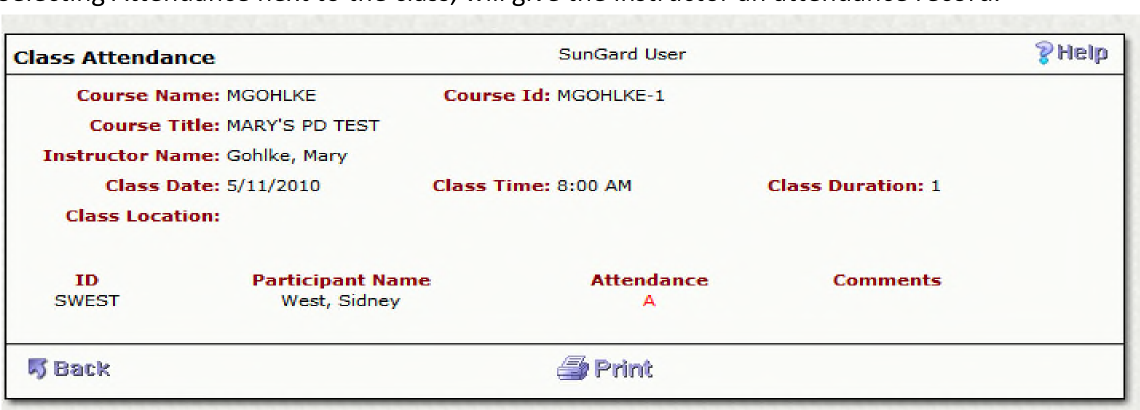
Class Date / Time

Date	Time	Duration	Alternate Location	
3/16/2009	8:00 AM	8		Attendance
3/15/2009	8:00 AM	8		Attendance

Participants List
No data available

Back Print

Selecting Attendance next to the class, will give the instructor an attendance record.


Class Attendance SunGard User Help

Course Name: MGOHLKE **Course Id:** MGOHLKE-1
Course Title: MARY'S PD TEST
Instructor Name: Gohlke, Mary
Class Date: 5/11/2010 **Class Time:** 8:00 AM **Class Duration:** 1
Class Location:

ID	Participant Name	Attendance	Comments
SWEST	West, Sidney	A	

Back Print

To navigate back, select Back in the lower left hand corner of the screen. You may also print the Course Information by selecting Print.

Prior Courses

This screen holds all prior courses for the Instructor.

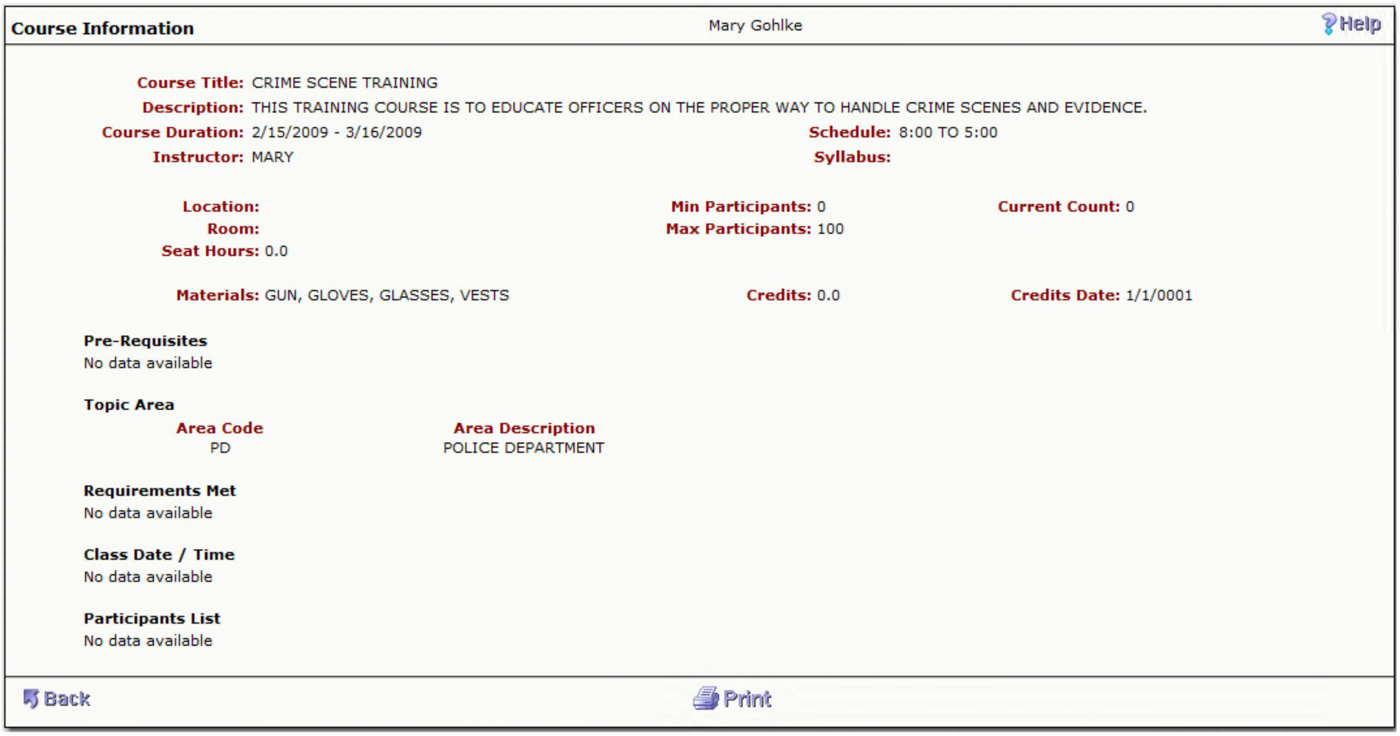
Prior Courses — Mary Gohlke — Help

Prior Courses	Course Status	Start/End Date	Location	Min	Max
CRIME SCENE TRAINING	Active	2/15/2009 - 3/16/2009		0	100
COMPUTER TRAINING	Active	2/26/2009 - 2/27/2009		0	100
FIRE ARM TRAINING LEVEL 2	Inactive	2/26/2009 - 3/2/2009		0	100
HOSTAGE	Active	2/27/2009 - 2/28/2009		0	0

Print

Select the course name to view detailed information of the course.

Select Print in the lower, middle of the screen to print the information. To navigate back to Prior Courses, select Back in the lower left hand.



Course Information — Mary Gohlke — Help

Course Title: CRIME SCENE TRAINING
Description: THIS TRAINING COURSE IS TO EDUCATE OFFICERS ON THE PROPER WAY TO HANDLE CRIME SCENES AND EVIDENCE.
Course Duration: 2/15/2009 - 3/16/2009 Schedule: 8:00 TO 5:00
Instructor: MARY Syllabus:

Location: Min Participants: 0 Current Count: 0
Room: Max Participants: 100
Seat Hours: 0.0

Materials: GUN, GLOVES, GLASSES, VESTS Credits: 0.0 Credits Date: 1/1/0001

Pre-Requisites
No data available

Topic Area

Area Code	Area Description
PD	POLICE DEPARTMENT

Requirements Met
No data available

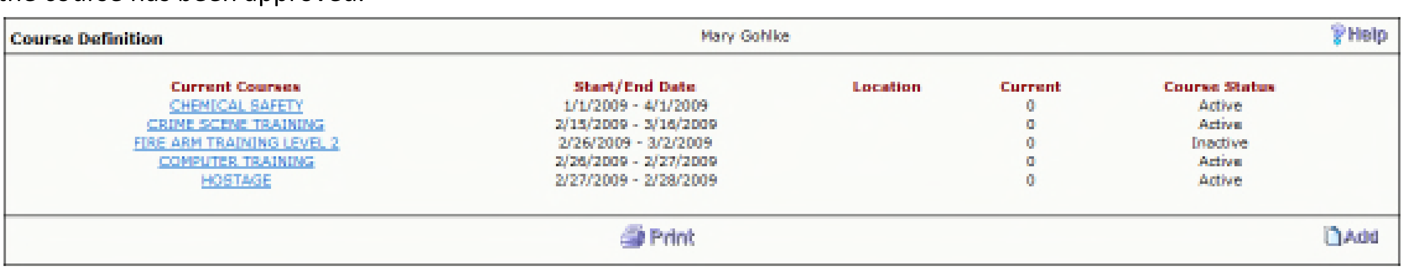
Class Date / Time
No data available

Participants List
No data available

Back Print

Course Definition

On this screen, an instructor can view the current courses along with the dates, location, current enrollment and if the course has been approved.



Course Definition — Mary Gohlke — Help

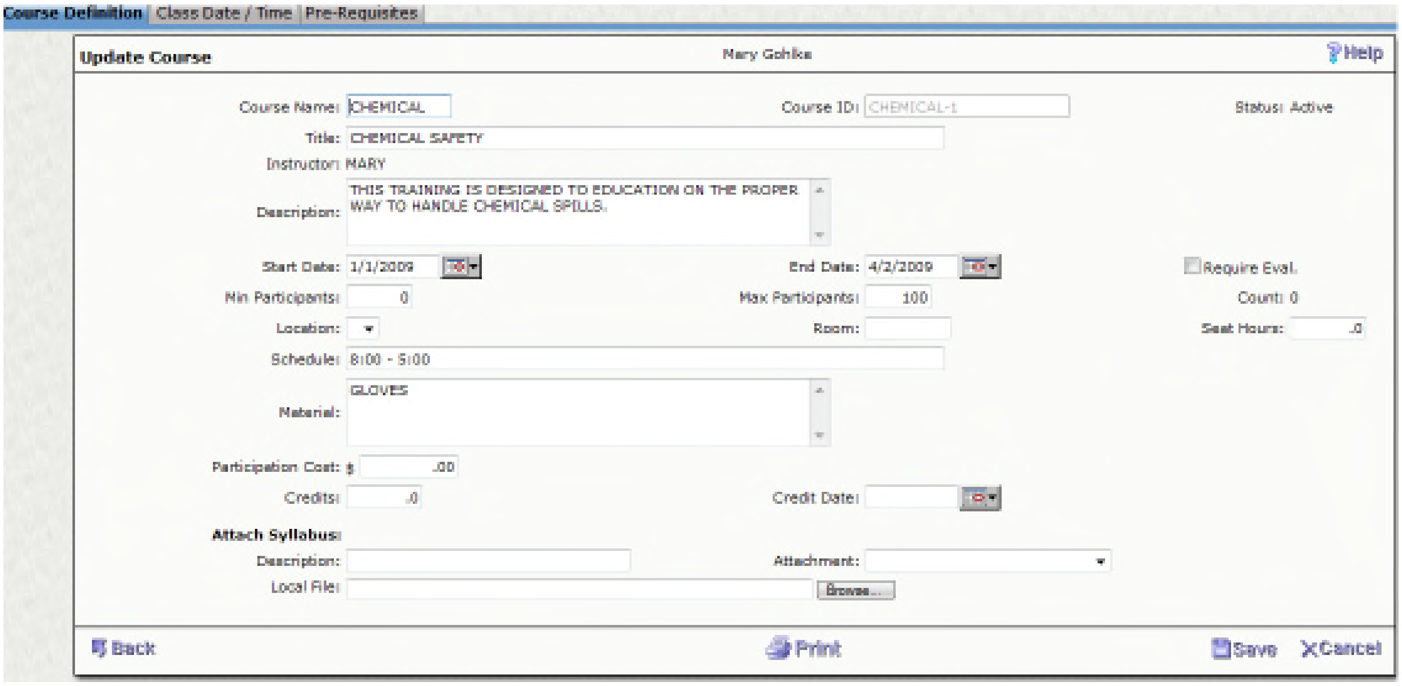
Current Courses	Start/End Date	Location	Current	Course Status
CHEMICAL SAFETY	1/1/2009 - 4/1/2009		0	Active
CRIME SCENE TRAINING	2/15/2009 - 3/16/2009		0	Active
FIRE ARM TRAINING LEVEL 2	2/26/2009 - 3/2/2009		0	Inactive
COMPUTER TRAINING	2/26/2009 - 2/27/2009		0	Active
HOSTAGE	2/27/2009 - 2/28/2009		0	Active

Print Add

To update a course description for a course listed, select the course name. This will bring you to a screen where you can make changes. After the changes are all made, by sure to select Save.

Making a change to the course description will not change the status of the course.

To navigate back to the Course Definition, select Back on the lower left hand of the screen.

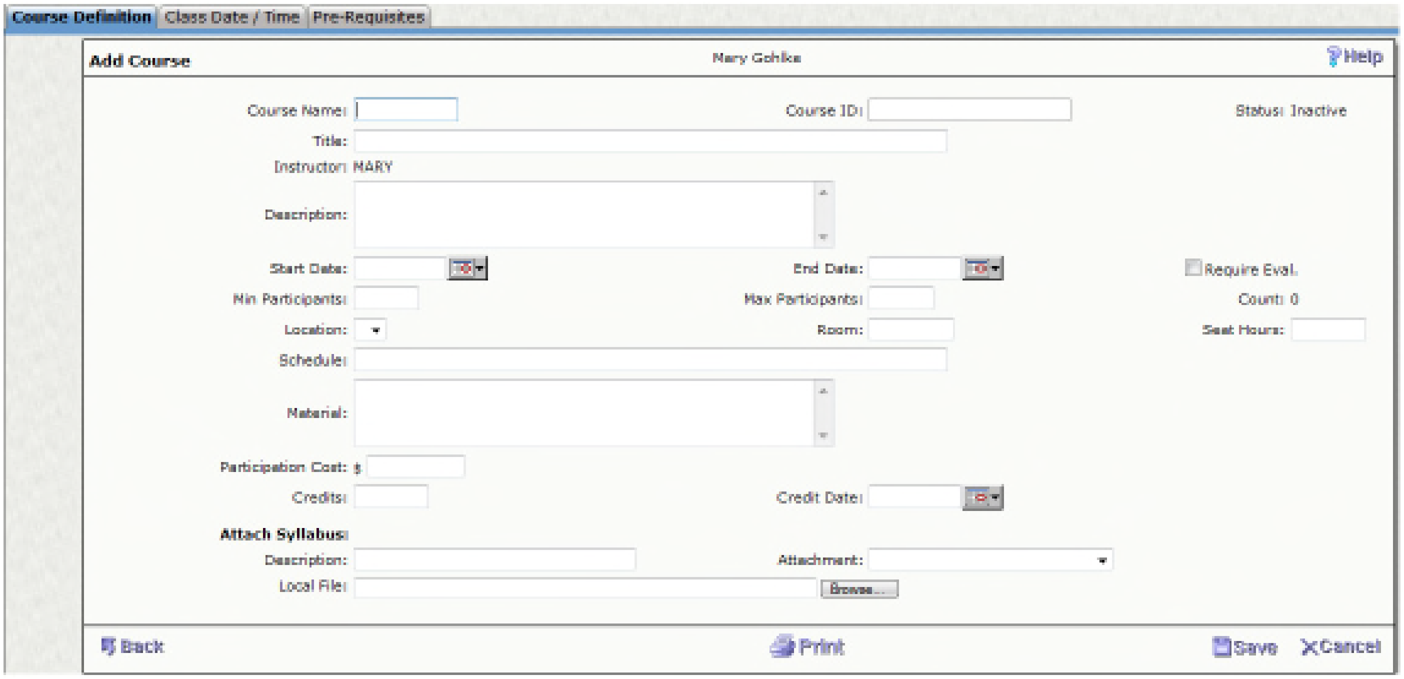


To create a course from the web, select Add in the lower right hand corner of the Course Description screen.

When an instructor creates a course from the web, it is created in an Inactive status. Within IFAS (HRPDUPCD), an approver needs to review the course and mark it as Active. Once this process is completed, the course will come across as Active online and participants are able to register and the instructor will view it as Active in the Course Status column on the Course Definition screen.

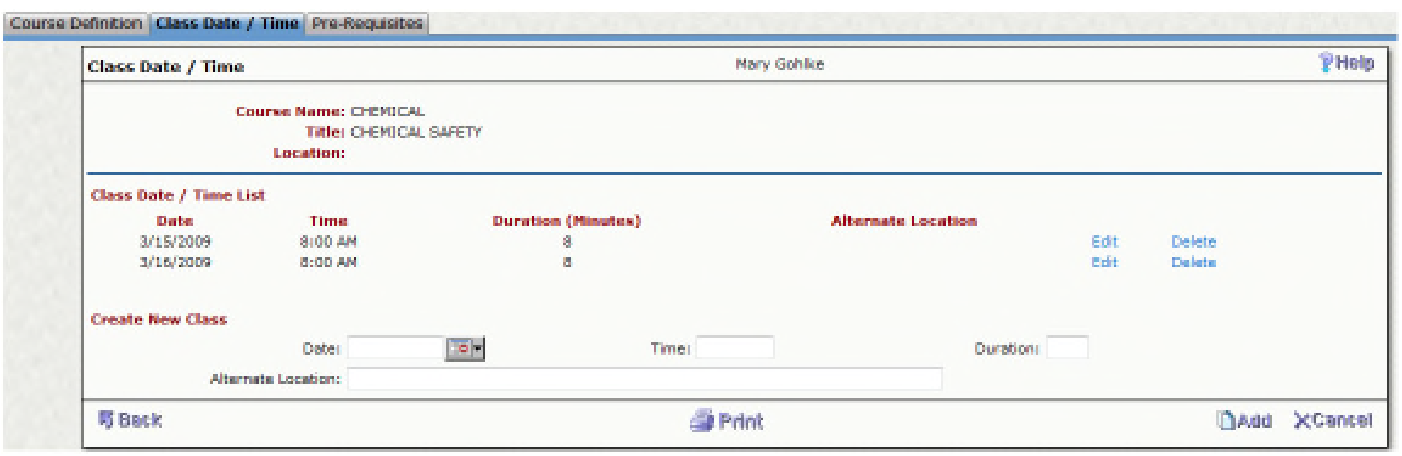
As an instructor, you can put all of the relevant information that you find necessary for the course definition.

When adding an attachment, all three fields are required, Description, Attachment and File.

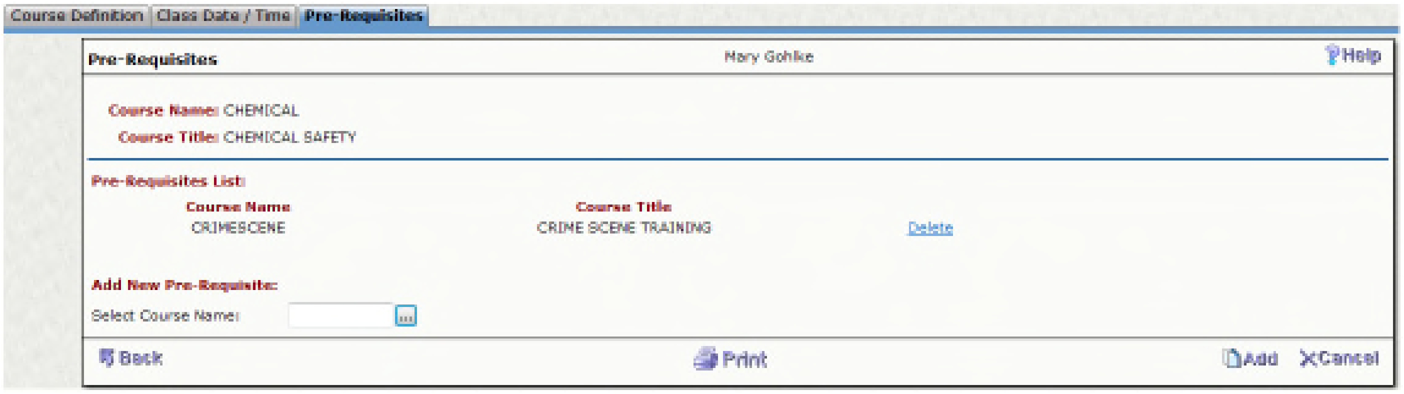


Be sure to select save and select the Class Date/ Time tab to define when the course will be held.

To create a new class enter the date and time. The Duration and Alternate Location are optional. Select Add and continue until each class is defined. If there are Pre-Requisites that must be met before taking this course, select the Pre-Requisites tab.

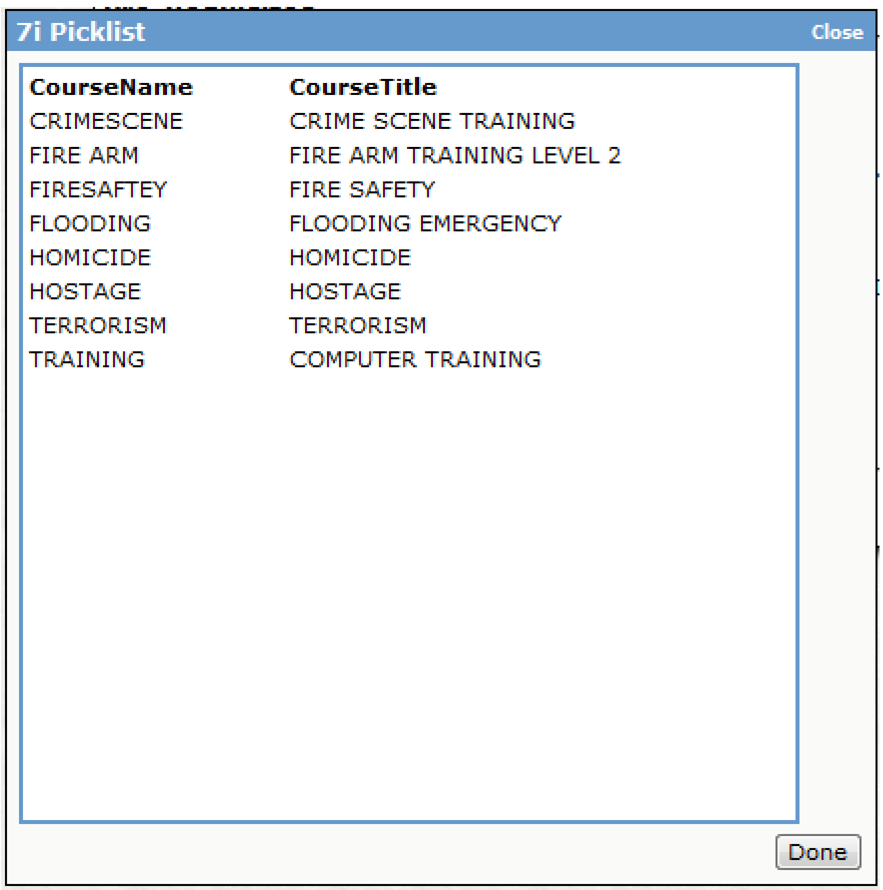


Each Pre-Requisite will be listed here.



To add a new pre-requisite, select the look up box next to Select Course Name to get a listing of all courses created in Professional Development. Highlight the course you would like to select and click Done in the lower right hand corner.

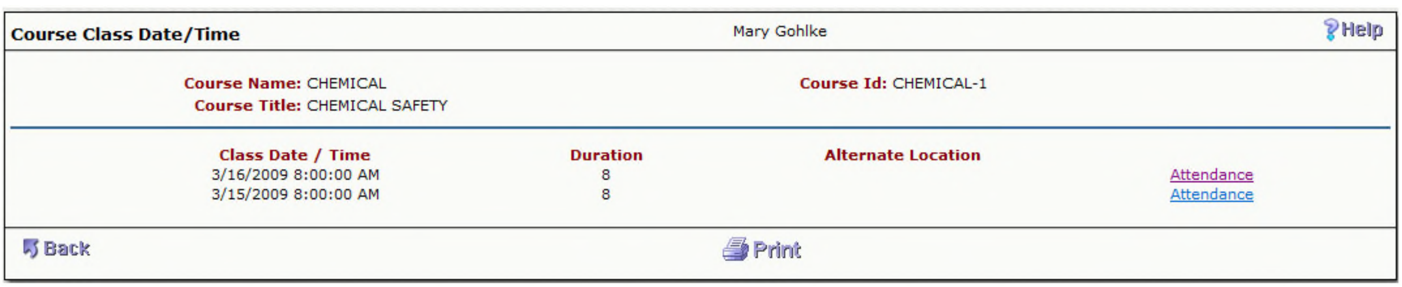
To navigate back, click Back on the lower right hand corner of the screens.



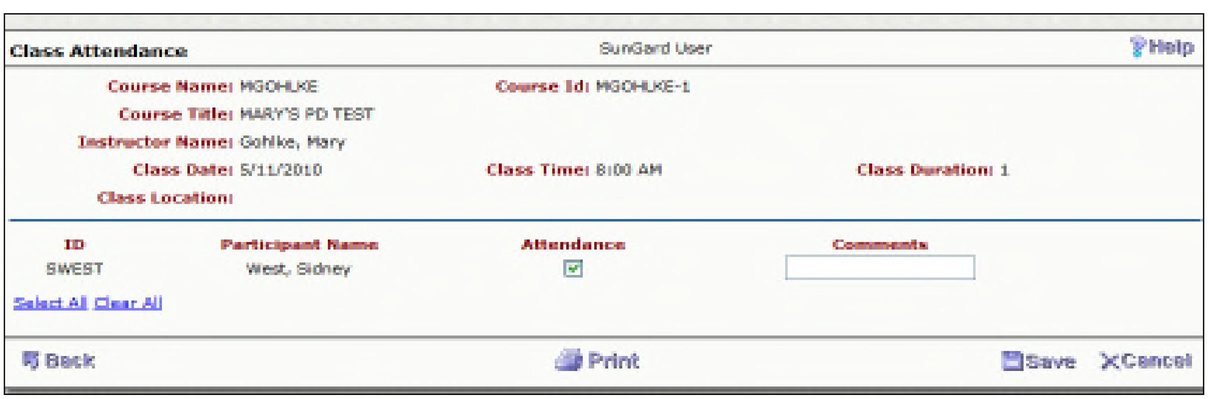
Course Attendance

This screen will list all current courses with an option to select Class Date/ Time as well as selecting the course name for course information.

By selecting Class Date/Time, an instructor can view each class separately.

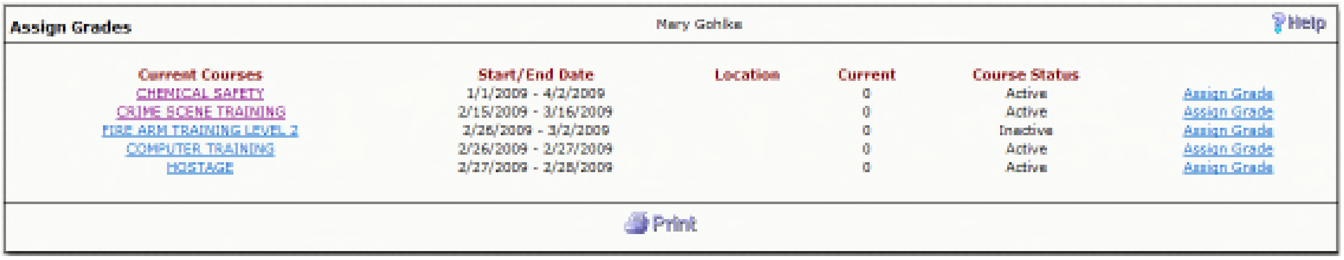


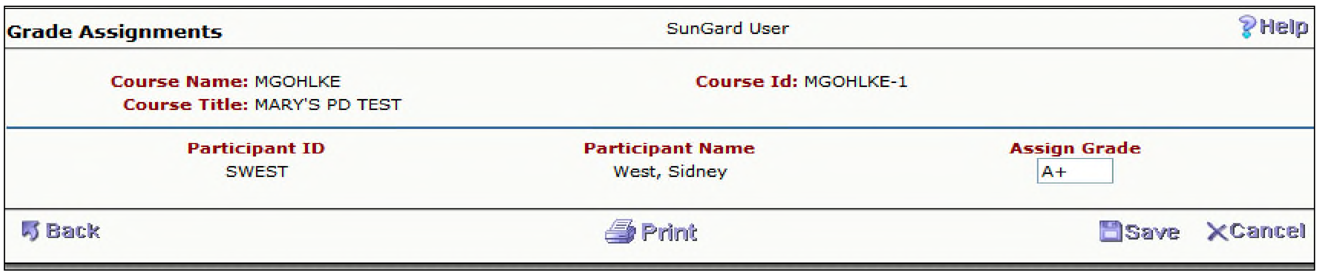
Select Attendance next to the day that you would like to record attendance for to get a listing of all enrolled participants.



Assign Grades

An instructor can assign grades to the participant from the web. Select Assign Grade from the Assign Grade screen to get a list of all of the students that were enrolled in that course.

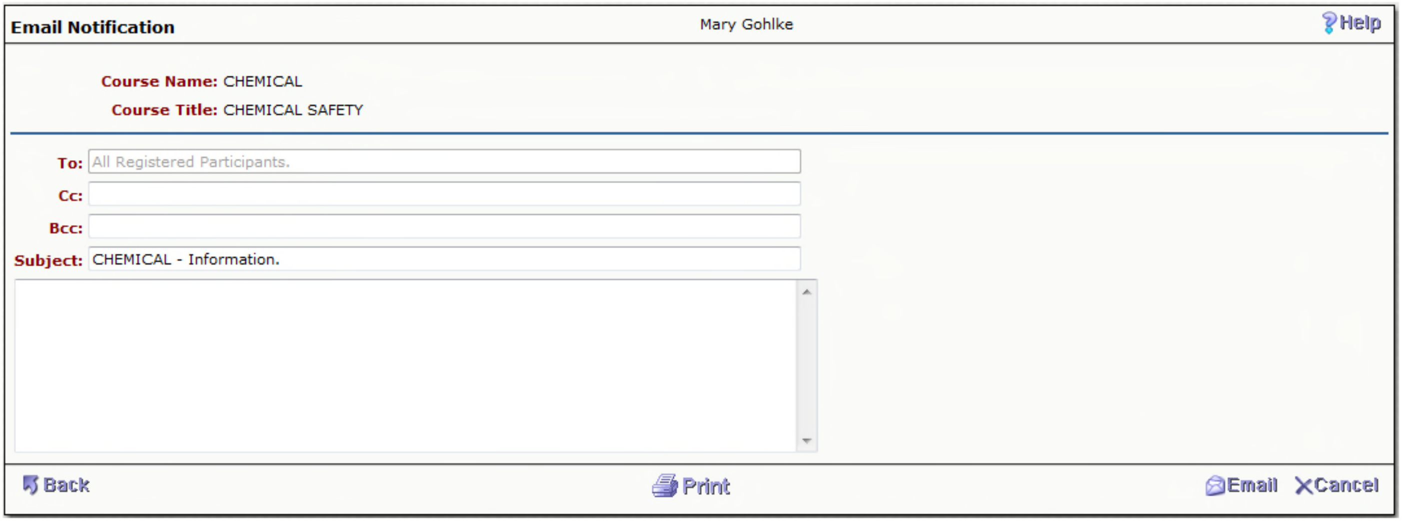




E-Mail Notification

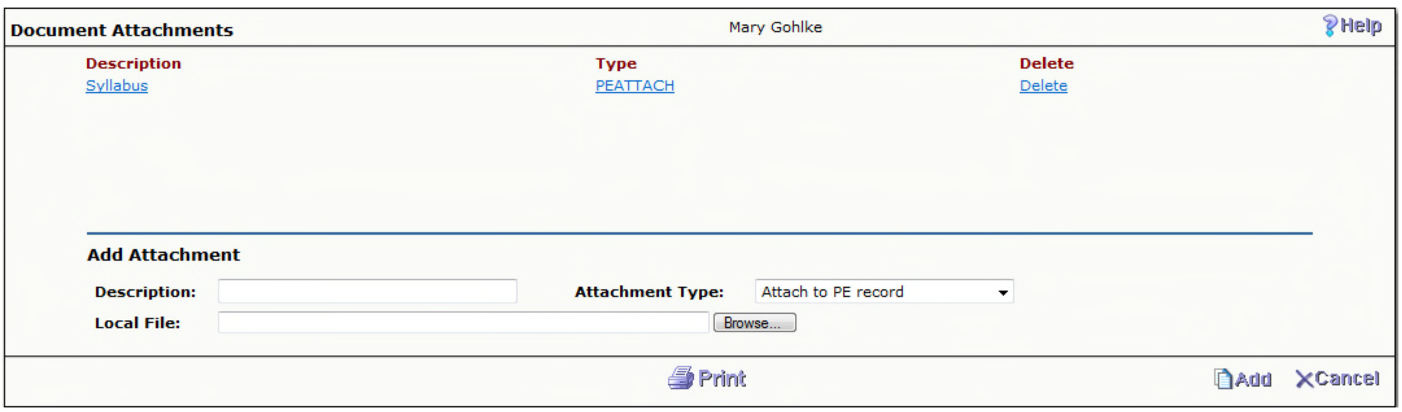
An instructor can send out an e-mail for all participants by selecting the E-mail Notification tab. Within the screen, each course that is a current course will be listed. Selecting E-mail Notification next to the desired course will allow you to create an e-mail.

You can compose an e-mail and send it directly from the web to all registered participants. The e-mail addresses of the participants are stored in PEUPPE (Person/ Entity Data Base + Update Data Base + Person/Entity Information). Selecting Email in the lower right corner of the screen will send the e-mail out to all registered participants. ***Note** the participants email addresses will appear in the BCC. This is for privacy purposes. Each participant will get the email but they will be unable to see the email addresses of the other participants.



Attachments

Attachments attached here will be tied to your record in PEUPPE. An instructor could save all syllabuses in one area for their reference.



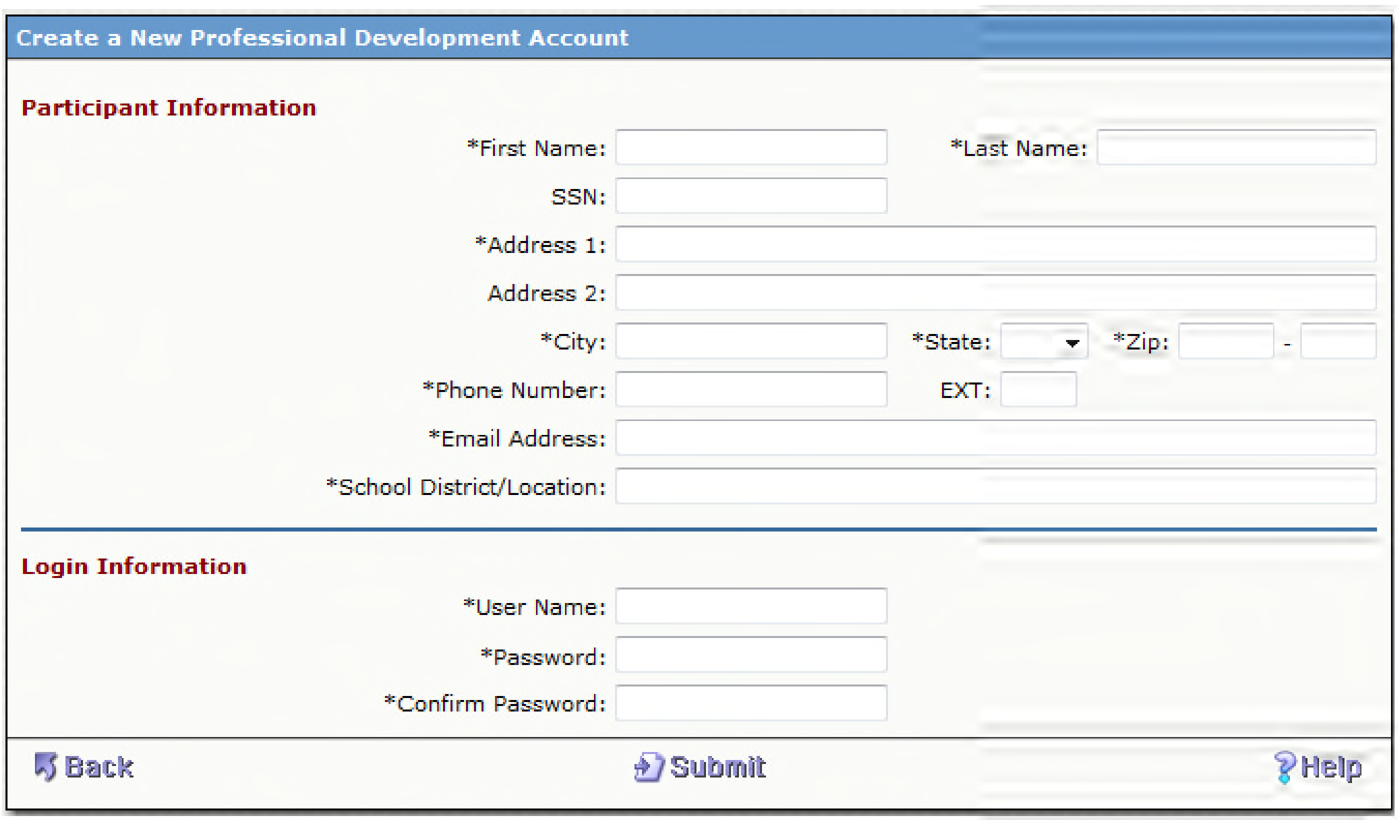
Participant's View

Participants can register for courses, getting on waiting lists for courses that are currently at limit as well as check information associated with the course such as syllabus, location, time, etc. Once a course is completed, you will be able to view the grade that you received for the course as well as fill out an evaluation form if applicable.

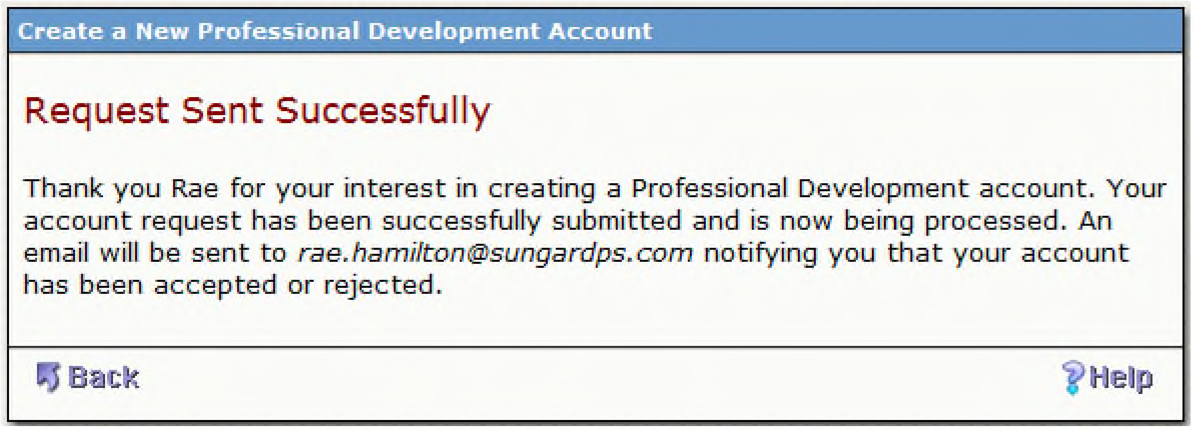
Go to http://<server>/finance/ProfDev

As a new user, select Create New User

When creating a new account, all areas marked with an asterisk (*) are required fields. Once you are finished, select submit.

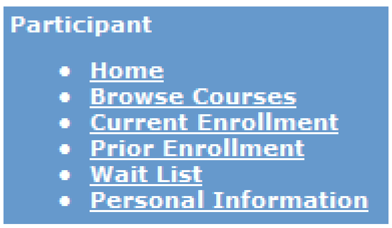


Selecting Submit will send a workflow request to the Professional Development Administrator to approve. Once your request has been approved, you will receive an e-mail stating that you can now register for courses.



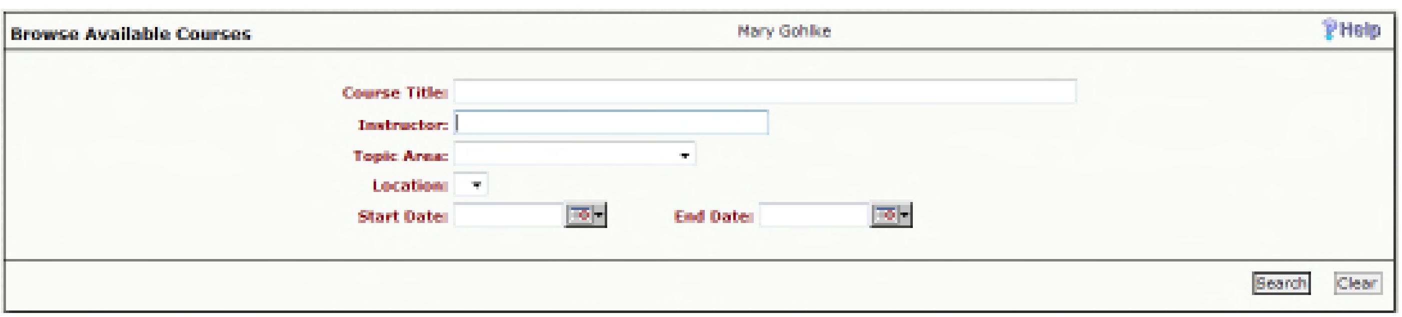
Participant's Menu

As a participant, you have five tabs to choose from.

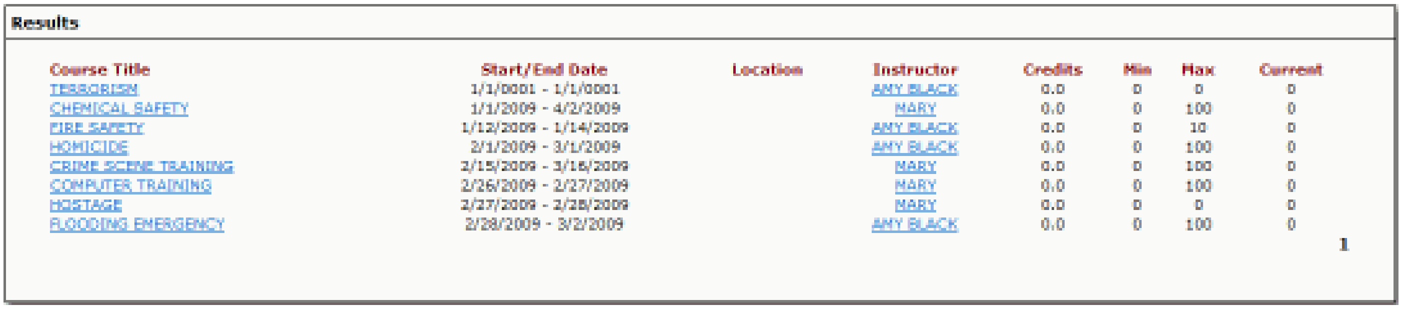


Browse Courses

You can browse current courses by searching by any of the fields. If you are not sure the exact course title or how to spell the entire instructor's name, you can use an astrict (*) as a wild card. (ie, Math* if I was not sure if a course was Math101, Mathematics, etc. This search would bring up all courses that started with Math.) The Topic Area and Location Fields are drop downs that you can search by selecting one of the options. After you have entered your search criteria, select search in the lower right hand corner.



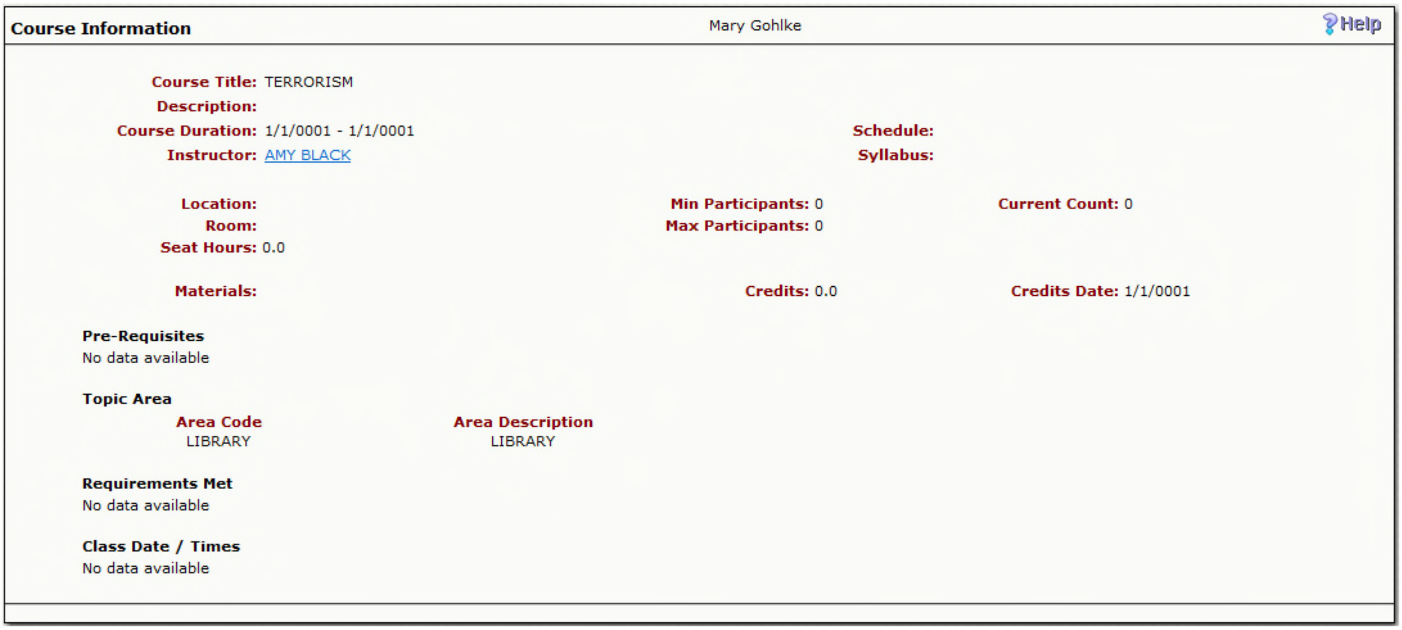
After selecting search, you will get a results screen. By selecting the Course Title, you will be given a more detailed description of the course with the option to register for that course.


Results

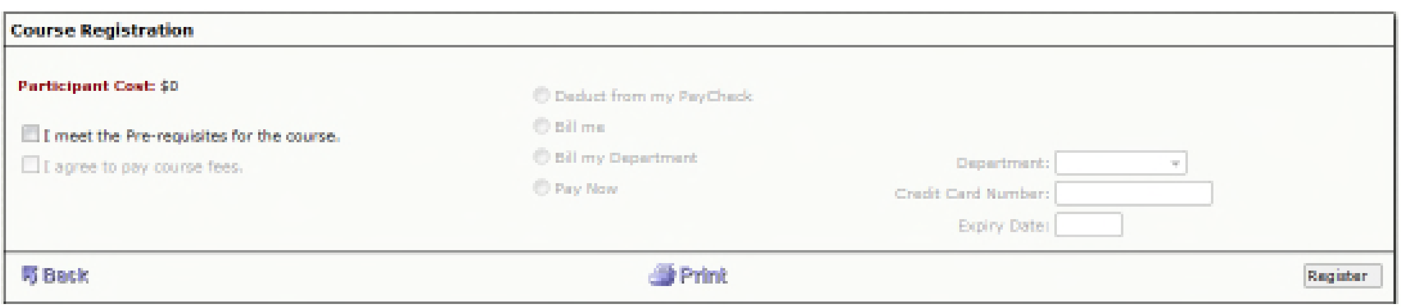
Course Title	Start/End Date	Location	Instructor	Credits	Min	Max	Current
TERRORISM	1/1/0001 - 1/1/0001		AMY BLACK	0.0	0	0	0
CHEMICAL SAFETY	1/1/2009 - 4/2/2009		MARY	0.0	0	100	0
FIRE SAFETY	1/12/2009 - 1/14/2009		AMY BLACK	0.0	0	10	0
HOMICIDE	2/1/2009 - 3/1/2009		AMY BLACK	0.0	0	100	0
CRIME SCENE TRAINING	2/15/2009 - 3/16/2009		MARY	0.0	0	100	0
COMPUTER TRAINING	2/26/2009 - 2/27/2009		MARY	0.0	0	100	0
HOSTAGE	2/27/2009 - 2/28/2009		MARY	0.0	0	0	0
FLOODING EMERGENCY	2/28/2009 - 3/2/2009		AMY BLACK	0.0	0	100	0

1

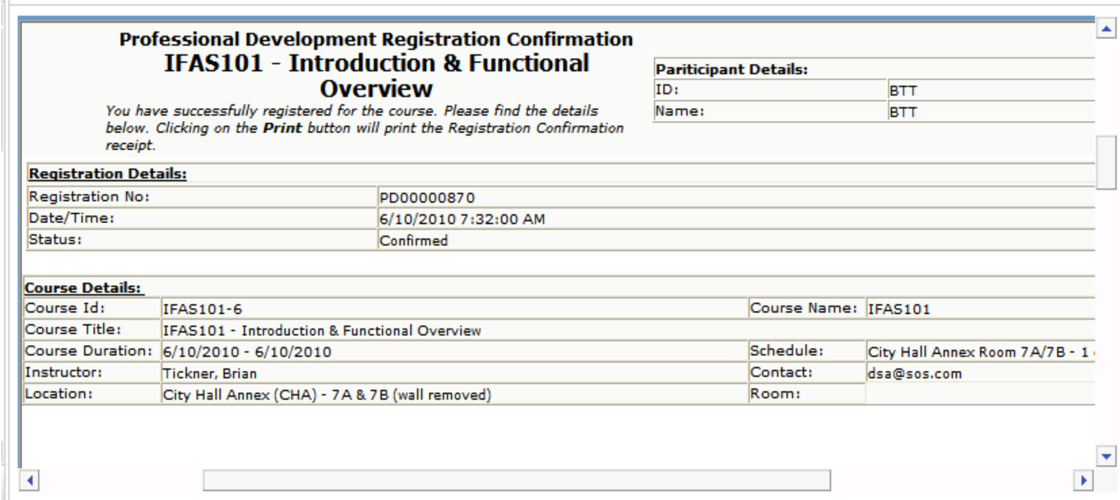
Within the Course Information, you will see if there are pre-requisites for that course. If you do you can scroll down to the Course Registration.



By selecting I meet the Pre-requisites for the course, the rest of the screen will become accessible. Select Register in the lower right hand corner to be enrolled in the course.



Along with an email confirmation, the following Registration Confirmation will be immediately displayed to the Participant upon the system verification that all registration requirements have been met.



Professional Development Registration Confirmation

IFAS101 - Introduction & Functional Overview

You have successfully registered for the course. Please find the details below. Clicking on the ***Print*** *button will print the Registration Confirmation receipt.*

Pariticipant Details:

ID:	BTT
Name:	BTT

Registration Details:

Registration No:	PD00000870
Date/Time:	6/10/2010 7:32:00 AM
Status:	Confirmed

Course Details:

Course Id:	IFAS101-6	Course Name:	IFAS101
Course Title:	IFAS101 - Introduction & Functional Overview		
Course Duration:	6/10/2010 - 6/10/2010	Schedule:	City Hall Annex Room 7A/7B - 1
Instructor:	Tickner, Brian	Contact:	dsa@sos.com
Location:	City Hall Annex (CHA) - 7A & 7B (wall removed)	Room:	

**** Note: You will need to go to the RegistrationConfirmation.aspx file and change the Contact email and the word Partiticipant and the participants Name. Instructions at end of document.

Current Enrollment

This screen will list all courses that you are currently enrolled in.

From Course Title view the detail Course Information including Instructor and Syllabus information as described above.

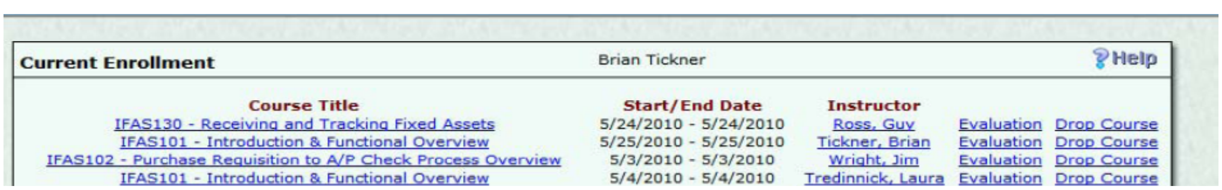
From Instructor view the current and prior courses they have taught as described above.

From Evaluation Complete' be able to access the Course/Instructor Evaluation survey.

Each Course Evaluation may contain different survey questions based on the Administrator's setup.

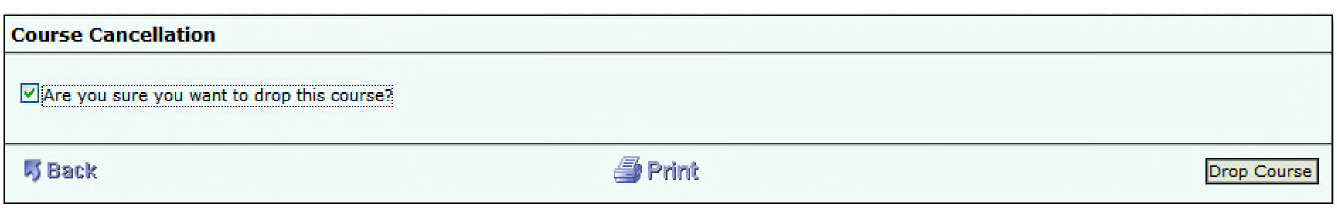
From Drop Course you are able to complete the steps to remove themselves from the selected Course.

The Drop Course process first displays the detail Course Information so that the Participant may verify that they have selected the correct course to be dropped. They are then presented with dialogue to positively indicate that they are dropping the course. Once they click Drop Course within the Course Cancellation area, they are immediately removed from the Course. If the Course has not begun and there is a Wait List of registrations, the next Participant in line will be immediately confirmed. The Drop Course action and change from Wait List to Confirmed Registration are sent via email notification.



Current Enrollment Brian Tickner Help

Course Title	Start/End Date	Instructor		
IFAS130 - Receiving and Tracking Fixed Assets	5/24/2010 - 5/24/2010	Ross, Guy	Evaluation	Drop Course
IFAS101 - Introduction & Functional Overview	5/25/2010 - 5/25/2010	Tickner, Brian	Evaluation	Drop Course
IFAS102 - Purchase Requisition to A/P Check Process Overview	5/3/2010 - 5/3/2010	Wright, Jim	Evaluation	Drop Course
IFAS101 - Introduction & Functional Overview	5/4/2010 - 5/4/2010	Tredinnick, Laura	Evaluation	Drop Course

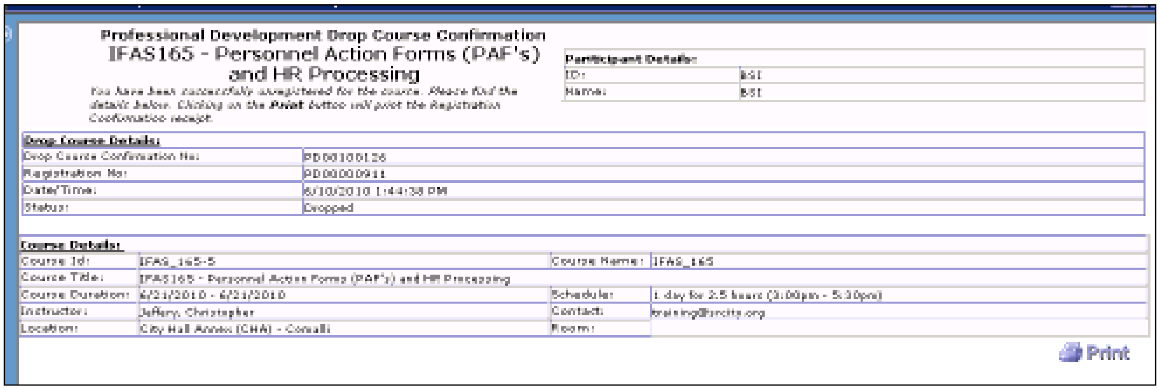


Course Cancellation

☑ Are you sure you want to drop this course?

Back   Print   Drop Course

Along with an email confirmation, the following Drop Course Confirmation will be immediately displayed to the Participant upon the system verification that all drop course processes have successfully completed.



Professional Development Drop Course Confirmation

IFAS165 - Personnel Action Forms (PAF's) and HR Processing

You have been successfully unregistered for the course. Please find the details below. Clicking on the **Print** button will print the Registration Confirmation receipt.

Participant Details:	
ID:	BSI
Name:	BSI

Drop Course Details:	
Drop Course Confirmation No:	PD00100126
Registration No:	PD00000911
Date/Time:	6/10/2010 1:44:38 PM
Status:	Dropped

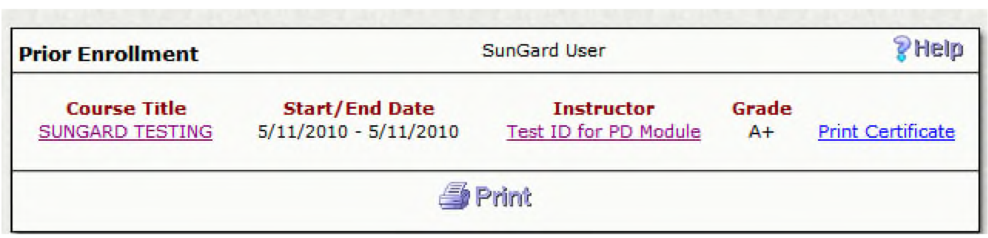
Course Details:			
Course Id:	IFAS_165-5	Course Name:	IFAS_165
Course Title:	IFAS165 - Personnel Action Forms (PAF's) and HR Processing		
Course Duration:	6/21/2010 - 6/21/2010	Schedule:	1 day for 2.5 hours (3:00pm - 5:30pm)
Instructor:	Jeffery, Christopher	Contact:	training@srcity.org
Location:	City Hall Annex (CHA) - Corralli	Room:	

Print

Prior Enrollment

This view displays a one line summary of previous courses completed. Links are provided to the detail Course Information, Instructor Information and provides the ability to Print their completion certificate One-Time if they received a passing grade. The detail Course and Instructor Information are the same as described above.

The Print Certificate option is only available after the Participant successfully completes the Course. The ability to print the certificate is a onetime option. If there is a printer problem and/or the Participant needs to reprint the Certificate, the Administrator can access the HRPDUPCD – Registration tab and place a check mark in the Certificate Available field. This will reset the Certificate for reprinting.



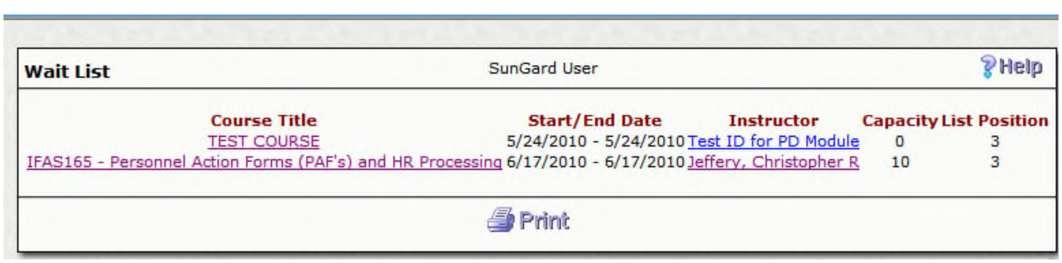
Prior Enrollment SunGard User ? Help

Course Title	Start/End Date	Instructor	Grade	
SUNGARD TESTING	5/11/2010 - 5/11/2010	Test ID for PD Module	A+	Print Certificate

Print

Wait List

If you register for a course that is at the max participants, you will be put on a waiting list. The waiting list is created by when you try to register for a course. If a participant withdraws from a course, the people on the waiting list will automatically get put into the course. Currently there is no way to drop a course from the Waitlist. The administrator can go to HRPDUPCD – Registration tab and change the participants status to DC (dropped class)



Wait List SunGard User ? Help

Course Title	Start/End Date	Instructor	Capacity	List Position
TEST COURSE	5/24/2010 - 5/24/2010	Test ID for PD Module	0	3
IFAS165 - Personnel Action Forms (PAF's) and HR Processing	6/17/2010 - 6/17/2010	Jeffery, Christopher R	10	3

Print

Personal Information

This view displays the current Name, Address, Phone and Email information on file for the Participant and provides the ability to edit that information if this capability is defined within the security setup.

If the participant is an employee, the **Personal Information** will be brought over from the Employee Master (HREMEN).

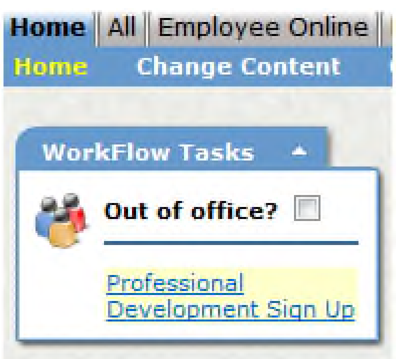
If the participant is an outside participant, it will bring their information that was submitted with the request from Person/ Entity Information (PEUPPE).

Professional Development Administrative View

Within OS, an employee with access to the Professional Development module has the ability to created courses to be published online as well as approve the courses that have been submitted from the web. They can also override attendance for classes such as adding participants or removing them from a course. An employee with these rights is referred to a Professional Development Administrator.

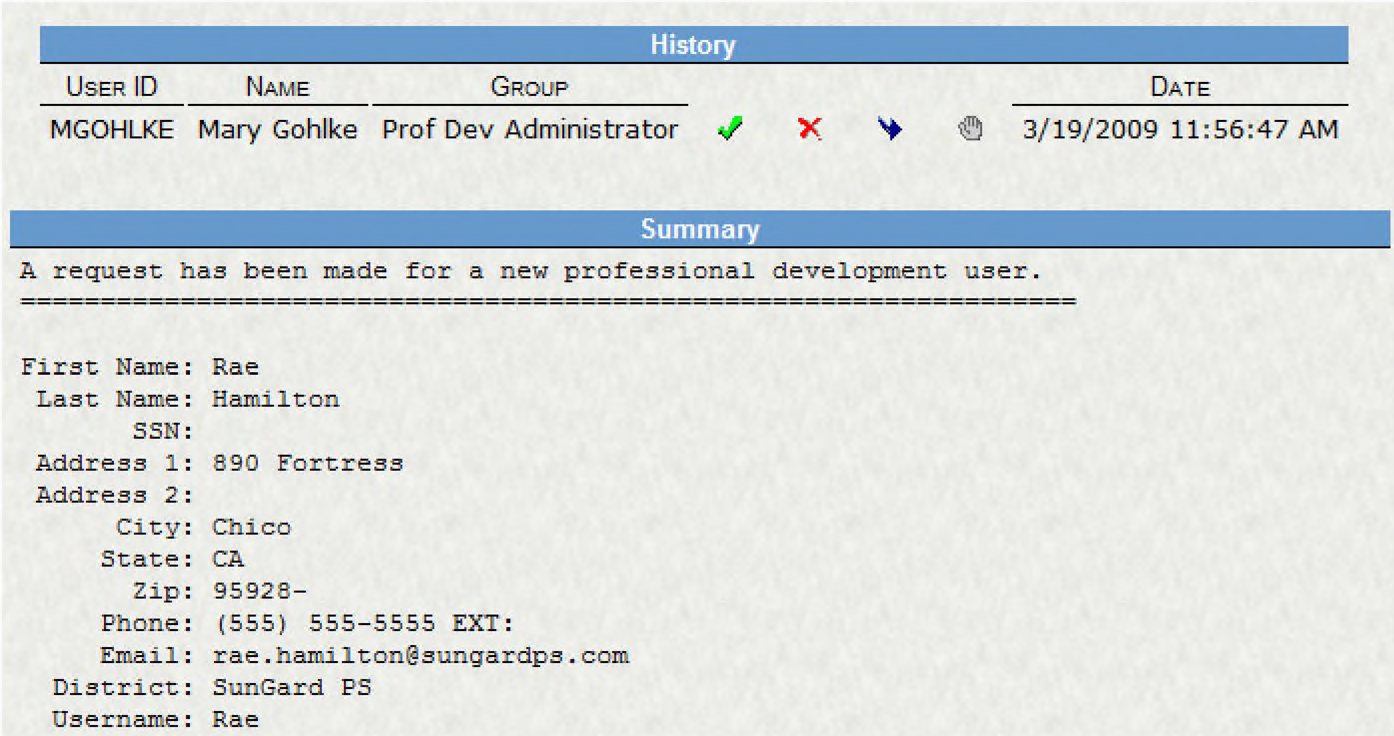
Participant Approval

Along with access to the screens, they are also responsible for approving new participants when they register through a workflow notification that will appear on their dashboard.

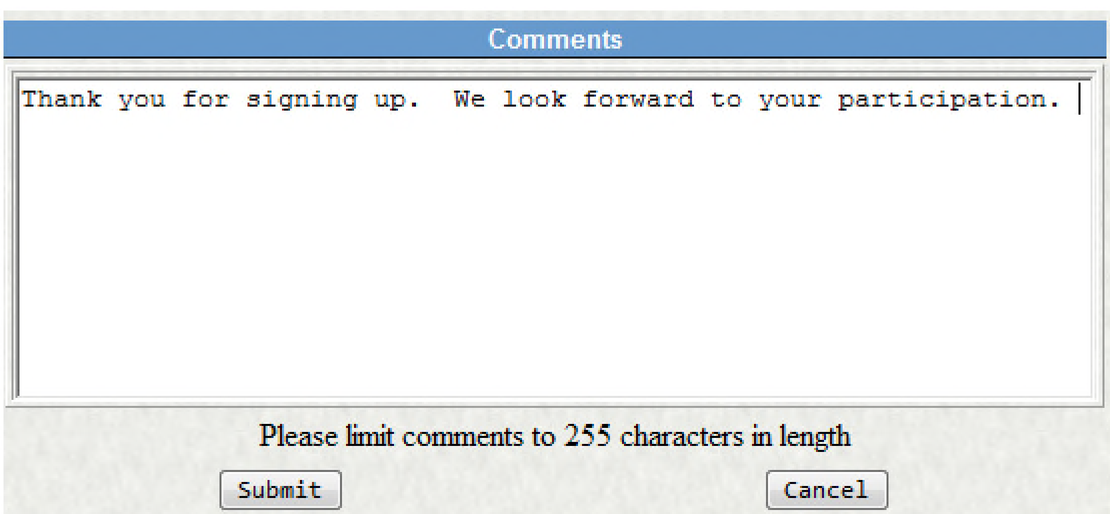


Select the Professional Development Sign Up. The left side of the screen will show the request.

The right side of the screen will show the participants information.



The Check Mark will approve the request. The X will reject the request. The Arrow will allow you to pass the request to another employee. Selecting the Check Mark will allow you to put a comment with the approval. Select Submit to finalize the approval.



Course Definition

Course Definition is where the course is defined with the detailed information associated with it. As mentioned, this screen can be used for approving courses that instructors created from the web or for creating a course. The screen is accessed through Human Resources + Professional Development + Update Data Bases + Course Definition (HRPDUPCD).

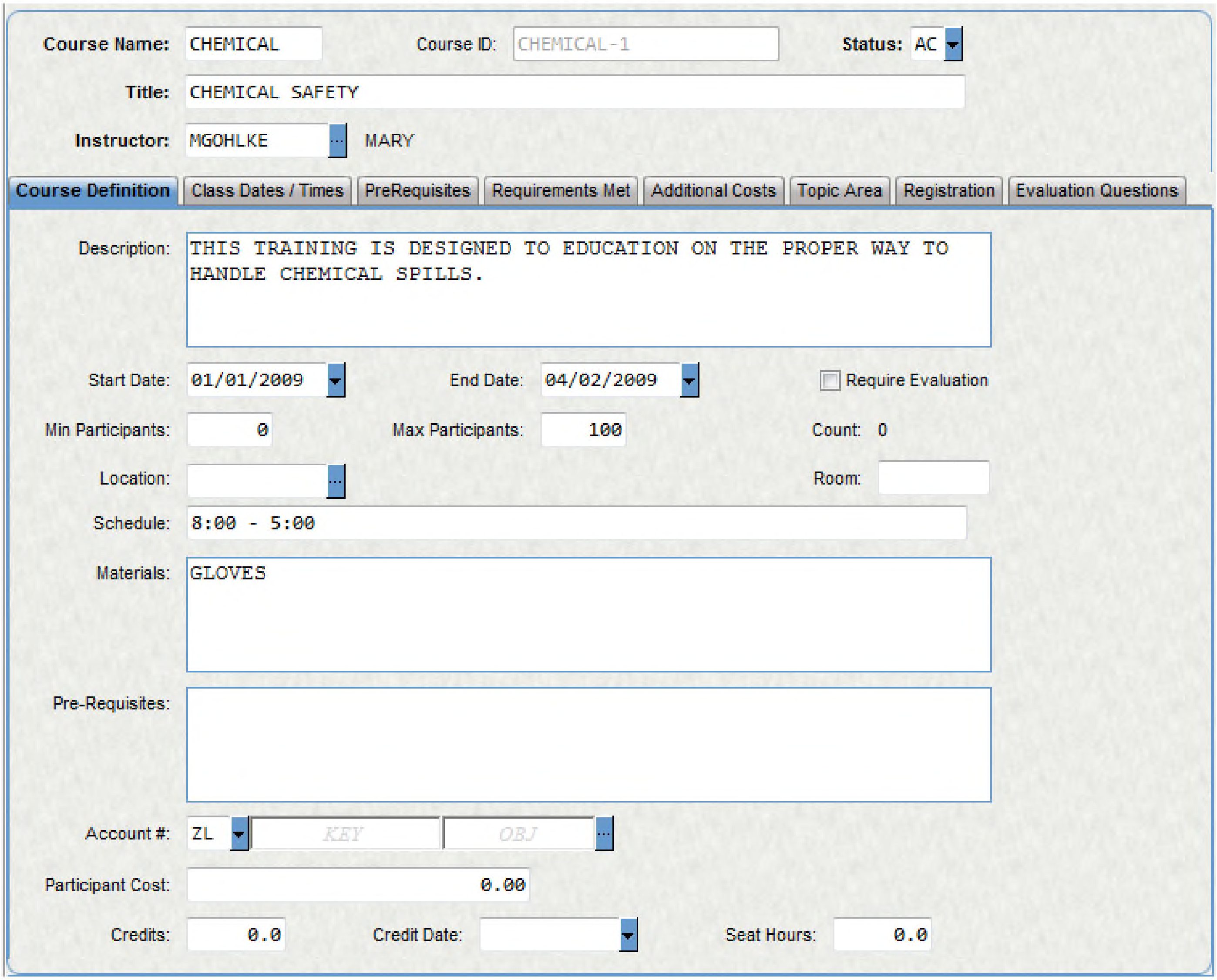
As with all OS Screens, the Attachments panel provides the opportunity to attach a document for 'Documents Online' and/or 'Threaded Text' to the details of a specific course. These may be items such as; non-published materials used in the course, locations for materials purchases, organizational policies related to confidentiality, copyright laws, etc.

The Course Name is a required field. After entering a name, the Course ID will automatically be generated from the name with the addition of a number. The number depends on if that course was already entered or not. The Status must be set to Active in order for participants to be able to register. If the Professional Development Administrator was only approving courses, this status will come in as Inactive until changed. The Course Title is open text. The Instructor is chosen from a lookup list. Selecting the three periods next to the text box will cause a list to appear which is coming from PEUPPE (Person/Entity Data Base + Update Data Bases + Person/ Entity Information).

Within the Course Definition tab, the fields are all optional. The Location is also a lookup that is driven from PEUPPE.

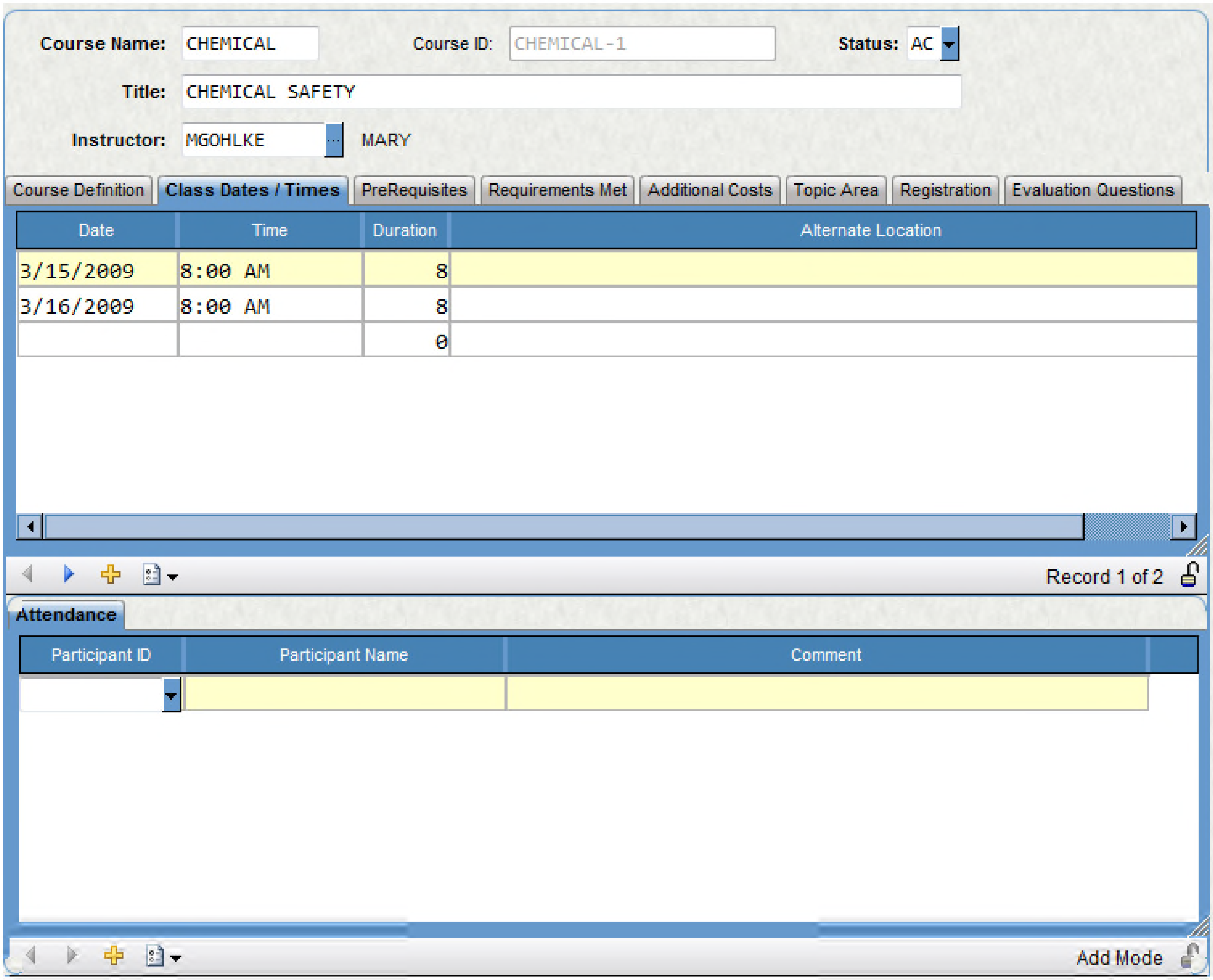
The ‘Min’ and ‘Max Participant’ fields allow the module to dynamically check the current ‘Count’ of registrations each time a new Participant attempts to register for the course. Once the ‘Max Participant’ count has been reached, all other registrations will be placed on a ‘Wait List’. Each time a ‘Confirmed’ registration drops the course the next Participant on the Wait List is automatically confirmed in the course and an email is sent via Workflow indicating their change in status. Likewise, if it is determined that the organization can increase the number of Participants in a course, the module will issue a confirmation for the next Participant(s) until the maximum is reached or there are no longer individuals on the Wait List, which ever occurs first.

All information, with the exception of Account #, is presented to the Participant when viewing any details related to an individual course. The account number entered into this screen should represent the revenue/Income account for any fees charged to the Participants. The ‘Additional Costs’ tab, discussed later, allows for the definition of GL/JL Expense accounts for charging costs such as; facilities, materials, instructor, etc. associated with the Course. The account number field utilizes all of the same characteristics as found in other account selection fields. The Job Ledger may also be used and associated with any given course.



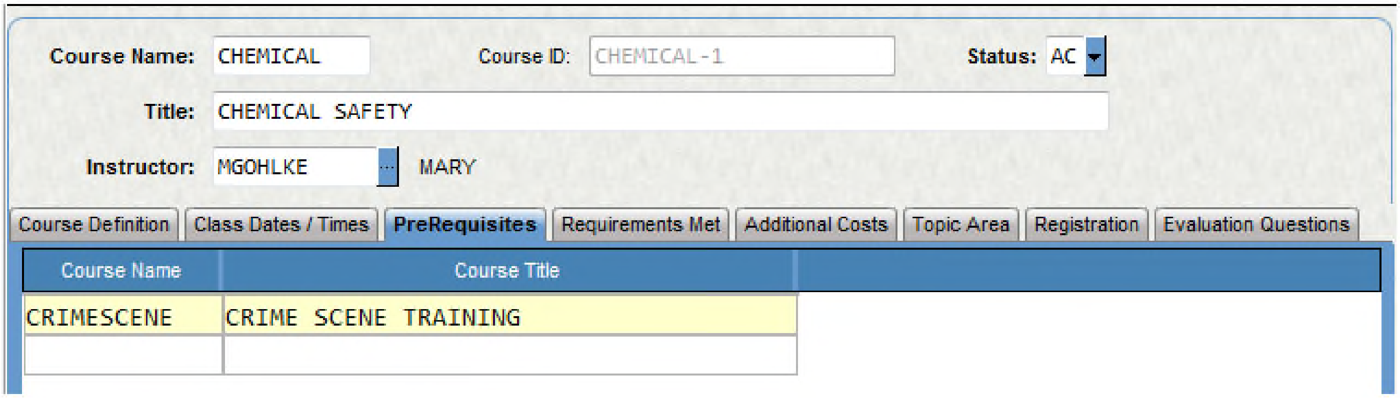
Class Dates/Times – Required

This screen has two sections below the Course Name header information. First, is the area where multiple date, start time, duration (in minutes) and alternate location are defined for as many times that the course will meet. Second, is the listing of Participant Attendance information for a highlighted date/time. While attendance information may be entered in this screen by the Administrator, it is anticipated that most attendance records will be entered by the Instructor within the attendance process provided via the web.



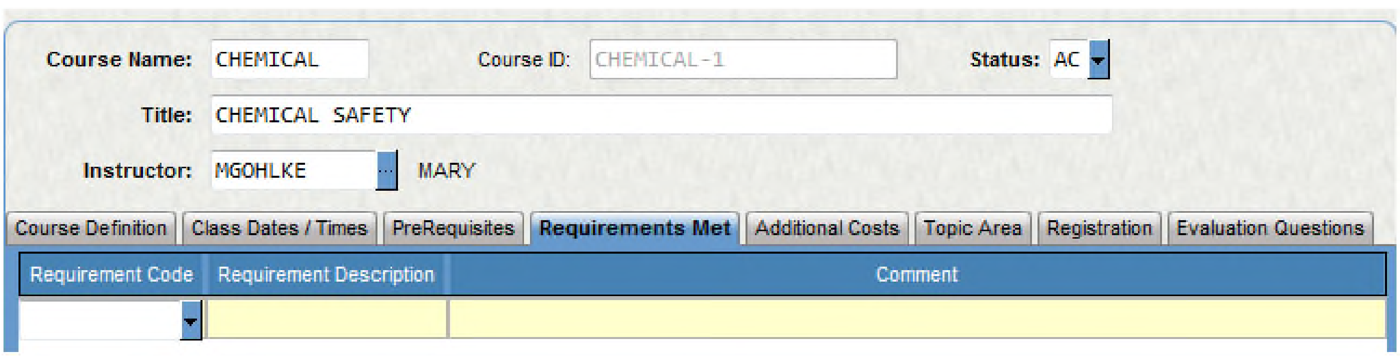
Pre-Requisites – Optional

If the Course being defined has specific pre-requisite course requirements, they are entered here. There is virtually no limit for the number of courses which may be assigned as pre-requisites. However, they must be courses previously defined in the Course Definition screen which have either an 'Active' or 'Inactive' status. When a course has defined pre-requisites, these will be automatically checked against a Participants' course history to ensure they meet the current requirements.



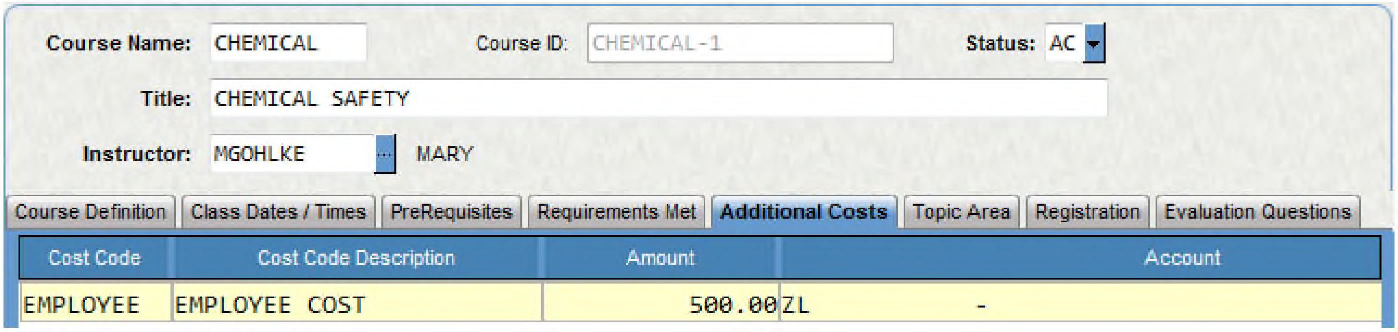
Requirements Met – Optional

If an individual course fulfills the requirements for one or more certifications, performance based incentives or other organizational related development, the defined requirement code(s) are entered in this screen. For instance, if a specific course such as 'Early Childhood Development Refresher' meets both District and State certification requirements, a separate code for District and State would be listed. The 'Requirements Codes' are entered through the HRPDUPCC – Course Codes process, defined later in this section. By utilizing these codes, analysis can be performed on the availability of courses and/or numbers of participants working toward these requirements.



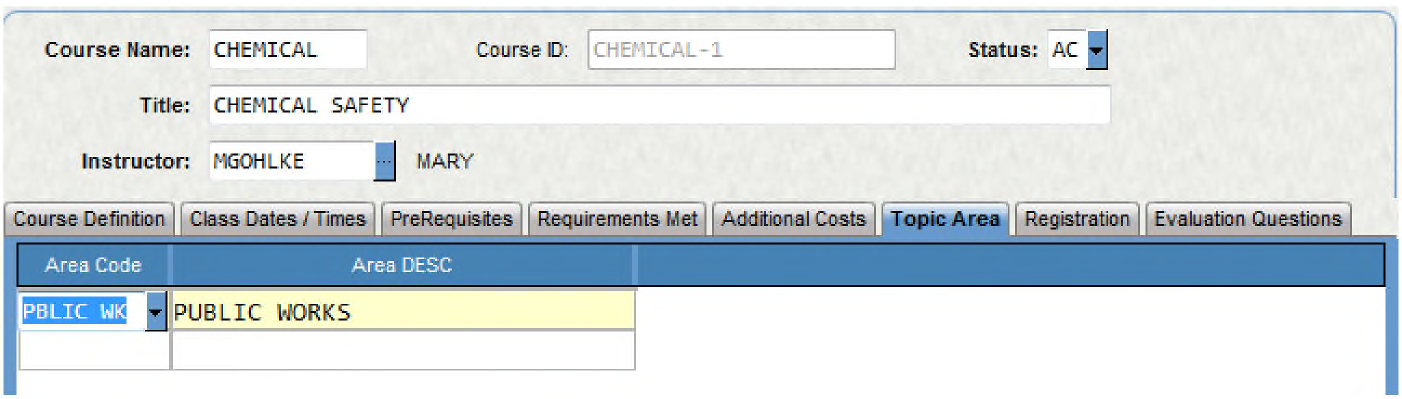
Additional Costs – Optional

If there are specific costs associated with providing this course, they may be entered on this screen. These may be related to facilities, materials and supplies, instructor payments, etc. These may be charged against both GL and JL sides. The 'Cost Codes' are entered through the HRPDUPCC – Course Codes process, defined later in this section. This information is not presented to either the instructor or participants; only to an administrator. The values and accounts entered into this area are used for INFORMATIONAL PURPOSES ONLY. There is NO POSTING process to the Financial or Personnel modules in IFAS.



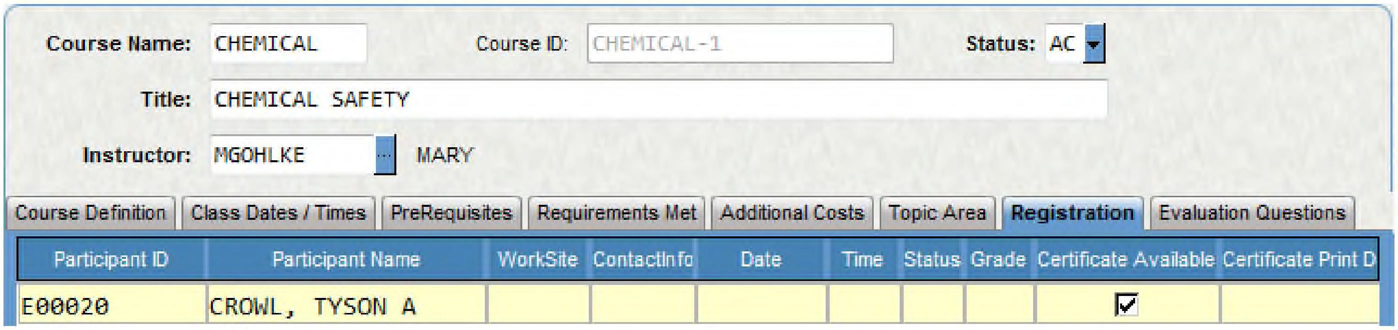
Topic Area – Optional

If the organization is interested in tracking courses that fall within certain 'Area(s)' of study these codes may be entered on this screen. For instance the course 'Using Computers in the Classroom 101' may fall within areas such as Elementary Education, Computer Education and/or General Classroom Techniques. By associating the related codes, with this course, individuals may extract a wealth of information on both the Course and Participant level in relation to level of usage or availability. Additionally, participants may use the 'Area' code as selection criteria when browsing for specific types of courses. The 'Area Codes' are entered through the HRPDUPCC – Course Codes process, defined later in this section.



Registration – Information Only or History Adjustments

The Registration screen is designed to provide a view of all Participants currently associated with the selected Course, regardless of 'Status'. Changes, Additions or Deletions to this information should only be entered when a problem has occurred with Participant access to the system or detail registration information needs to be adjusted outside of the regular Registration process. One special reason for accessing this information is when an individual has previously printed a Course Certificate and needs to have it reprinted. In this case, the Administrator can place a check mark in the 'Certificate Available' field and the Participant will be able to reprint their individual certificate one time.

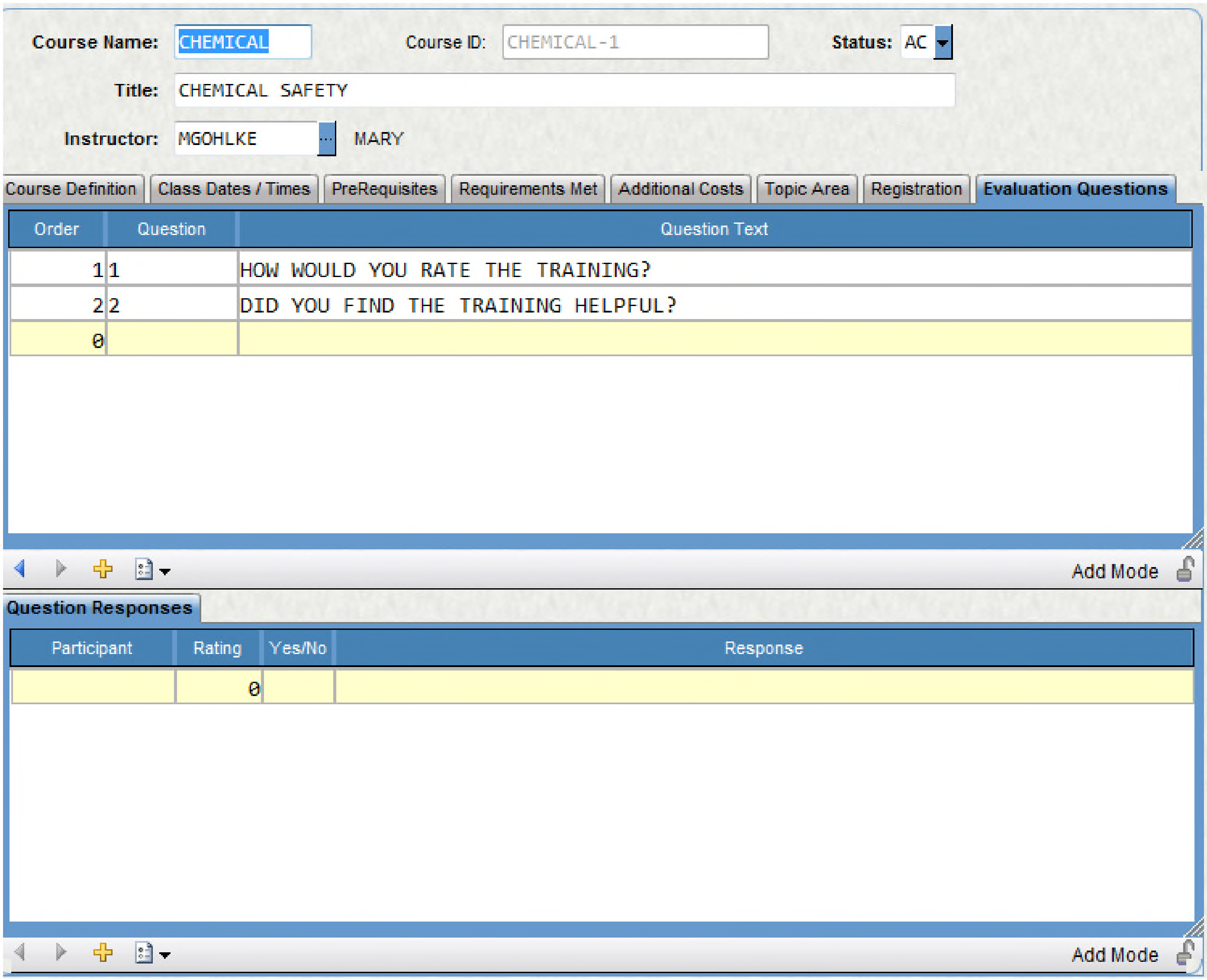


Evaluation Questions – Optional

This screen associates the Evaluation Questions from the user defined library of available questions with the selected Course. The 'Evaluation Questions' are entered through the HRPDUPCC – Course Codes process, defined later in this section. This screen has two sections below the Course Name header information. First, is the area within which to select the Evaluation Questions that will be presented to the Participant upon course completion. When selecting a question, the Administrator must identify the order in which the question will be presented. Questions may be 'Y/N', Scale with Min/Max values or Text.

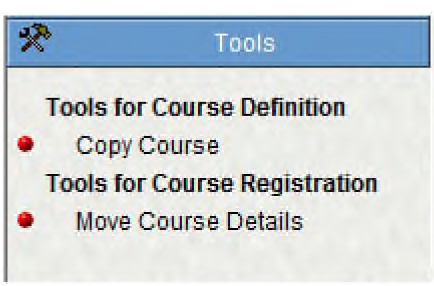
To select one of the questions defined in HRPDUPCC, the question column will have a drop down of each of the optional questions that could be asked. Select the one that you would like to be part of the evaluation. To add another question, select the '+' symbol below the questions. This will give you the option to add more questions. Hit enter to make sure that all additions are saved. Look for the 'Record Accepted' at the top of your screen.

Second, once a Course has been completed this section will display a listing of all Participants 'Question Responses' to the highlighted question

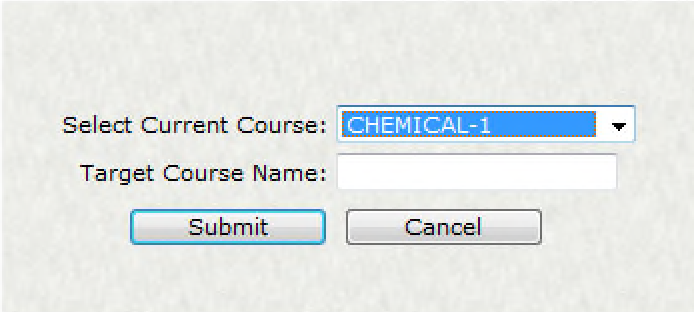


Tools

Two Tools are provided to ease the data entry process for defining repetitive or similar courses.



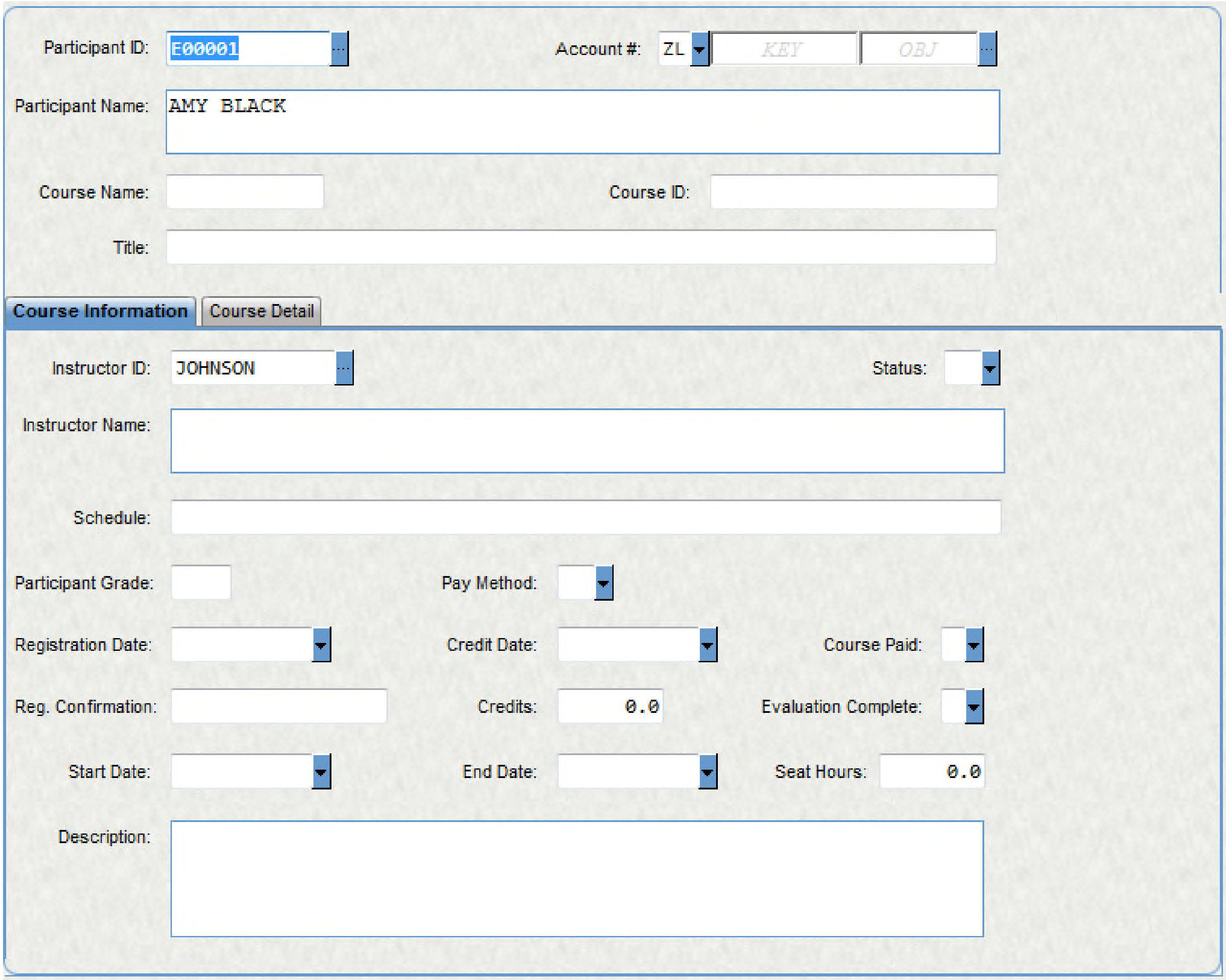
The Copy Course tool allows the user to copy all details in one course to create a new course with a different ‘Course Name’ as shown below. Once the user clicks on ‘Submit’ the new course is created and may then be adjusted for any information changes.

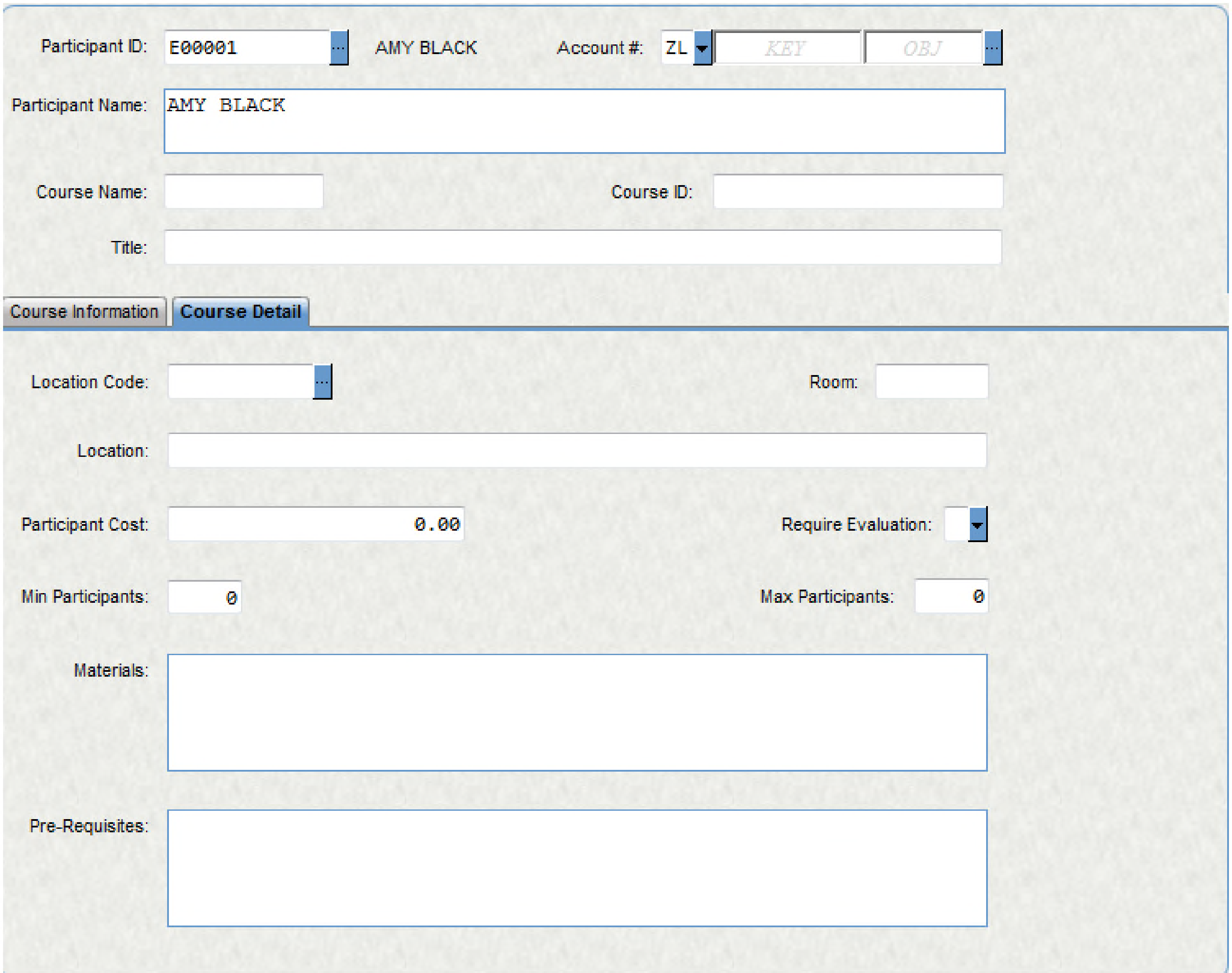


The ‘Move Course’ tool removes the details from a selected course and moves those details to another, existing course.

Course History

Course History is accessed through Human Resources + Professional Development + Update Data Bases + Course History (HRPDUPCH). The purpose of this screen is to provide the ability to view and/or update historical individual participant and course detail information, including course information that may or may not have been part of your organization’s professional development module. The upper portion of the screen provides a summary view of participant and course(s) registered and/or taken. The Course Information and Detail tabs shown in the lower portion of the screen identify all elements related to the course being browsed. Based on the users’ security they may view and/or change the information displayed.


Participant ID: E00001
Account #: ZL KEY OBJ
Participant Name: AMY BLACK
Course Name:
Course ID:
Title:
Course Information
Course Detail
Instructor ID: JOHNSON
Status:
Instructor Name:
Schedule:
Participant Grade:
Pay Method:
Registration Date:
Credit Date:
Course Paid:
Reg. Confirmation:
Credits: 0.0
Evaluation Complete:
Start Date:
End Date:
Seat Hours: 0.0
Description:



Course Setup

Access HRPDUPCC (Human Resources + Professional Development + Update Data Bases + Course Codes)

The purpose of these screens is to define the master table of various codes that can be used in the Course Definition process described above.

To add multiple records on this screen select the '+' symbol at the top of the screen.

Category Codes – Optional

The Category and Requirement Codes define levels of certification, performance based incentives or other organizational related development goals. As described above in the Course Definition screen, one or more 'Requirement Code(s)' may be associated with a Course to identify that it fully or partially fulfills the 'Requirement'.

Category Codes are associated with Requirement Codes. They provide a higher level of summary reporting and may be associated with multiple Requirement Codes.

Category Codes | Requirement Codes | Cost Codes | Area Codes | Evaluation Questions

Category Code	Description
EDU DVLP	EDUCATION DEVELOPMENT
FIRE ARM	FIRE ARM TRAINING
HANDLING	WEAPON HANDLING
NGTATION	NEGOTIATION
SAFETY	SAFETY TRAINING

Requirement Codes – Optional

Requirement Codes define specific levels of certification, performance based incentives or other organizational related development goals. As described above in the Course Definition screen, one or more 'Requirement Code(s)' may be associated with a Course to identify that it fully or partially fulfills the 'Requirement'. A 'Requirement Code' may be associated with only one Category Code.

Category Codes | **Requirement Codes** | Cost Codes | Area Codes | Evaluation Questions

Requirement Code	Category	Description
STATEREQ	FIRE ARM	STATE REQUIREMENT

Cost Codes – Optional

Cost Codes define the different types of 'Additional Costs' which may be entered on the Course Definition screen.

Category Codes | Requirement Codes | **Cost Codes** | Area Codes | Evaluation Questions

Cost Code	Description
EMPLOYEE	EMPLOYEE COST
INSTRUCT	INSTRUCTOR COST

Area Codes – Optional

Area Codes provide a method of tracking courses that fall within certain functional areas of study.

Category Codes | Requirement Codes | Cost Codes | **Area Codes** | Evaluation Questions

Area Code	Description
LIBRARY	LIBRARY
PBLIC WK	PUBLIC WORKS
PD	POLICE DEPARTMENT

Evaluation Questions – Optional

This screen provides the ability to create a library of Course/Instructor Evaluation Questions which can be selected and associated with a specific Course. Each evaluation question must have a Question ID. It may be helpful to create Question ID's that group similar types of questions together so that they can be easily viewed and selected on the Course Definition screen. When selecting a Question ID on the Course Definition – Evaluation Questions screen, the Administrator will be able to determine the 'Order' in which the question will be presented within the Participant Course Evaluation process.

Each question text is limited to 250 characters. When writing a question, please keep in mind the Participant audience who will be responding to each question. Each question may be one (1) of the three (3) different Response Types available:

1. 'N' Numeric Rating that has a Low to High scale defined.

2. 'T' Text response which provides for written narrative responses from the Participant.

3. 'Y' Yes/No response

Category Codes | Requirement Codes | Cost Codes | Area Codes | **Evaluation Questions**

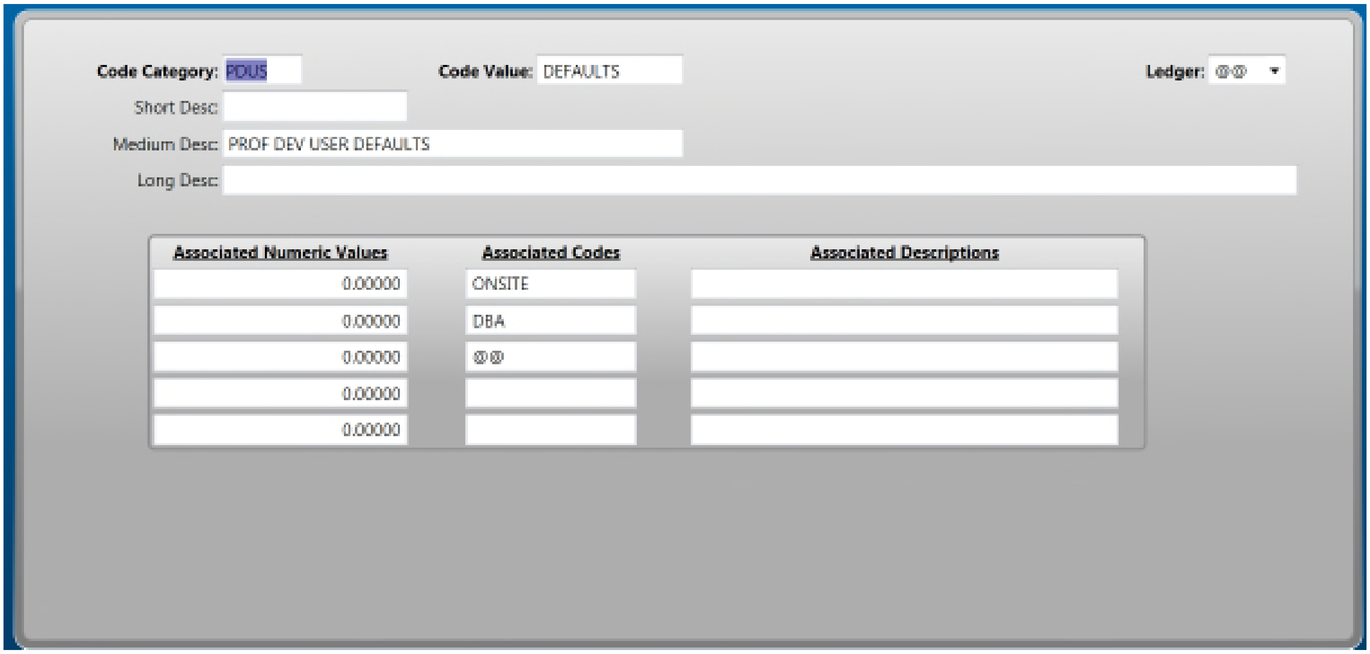
Question ID	Question	Resp	Low Ratin	High Rating
1	HOW WOULD YOU RATE THE TRAINING?	N	1	5
2	DID YOU FIND THE TRAINING HELPFUL?	N	1	5
3	RATE THE INSTRUCTORS KNOWLEDGE OF THE TOPIC.	N	1	5
4	WOULD YOU TAKE THE TRAINING AGAIN?	T	0	0

System Setup

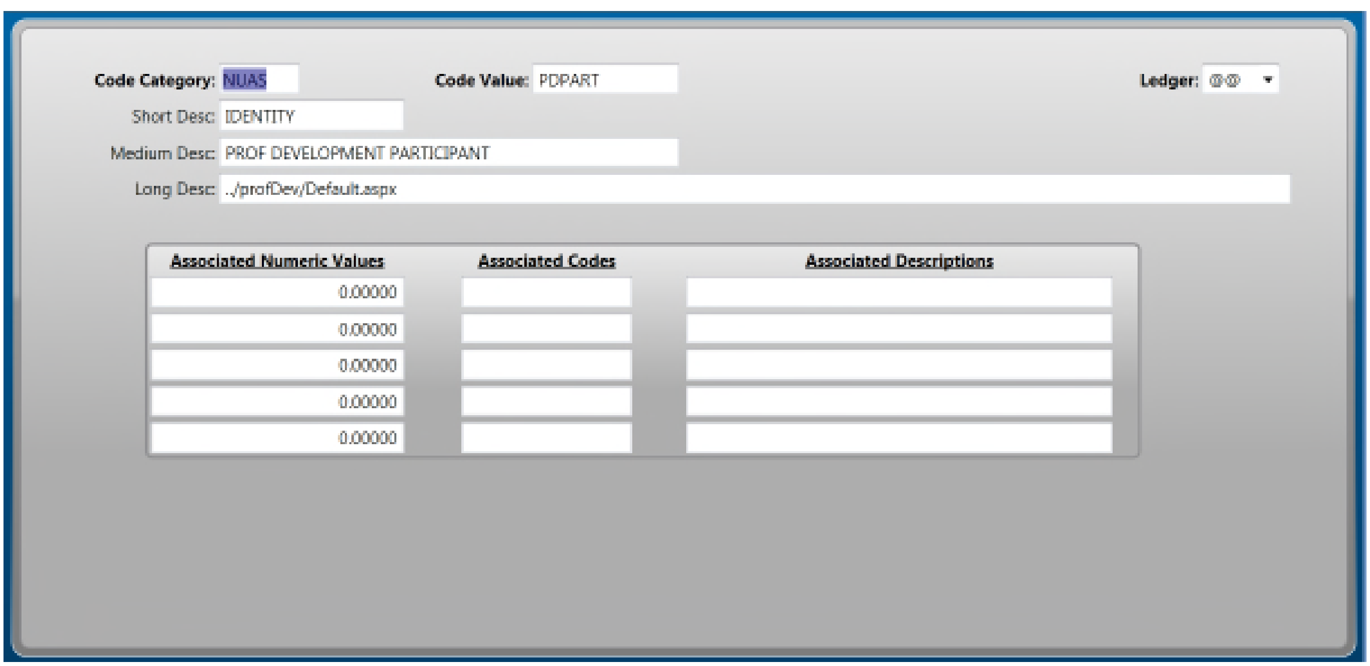
To access the Professional Development portal, security must be established in the form of a specific User ID record in NUUPPU with an Association Code of either "PDPART", "PDINST", or both. This signifies that the user is a Participant and/or Instructor, and the appropriate PD options will appear when accessing the PD portal. Employees must have a User ID (i.e. NUUPPU) to access the PD system, along with the appropriate "PDPART" and/or "PDINST" association. When non-employee users access the Professional Development portal they can request the creation of an account. The workflow model that routes the approval of the new user account can then create the user automatically. Creation of the new user account does require some defaults which are noted in a common code.

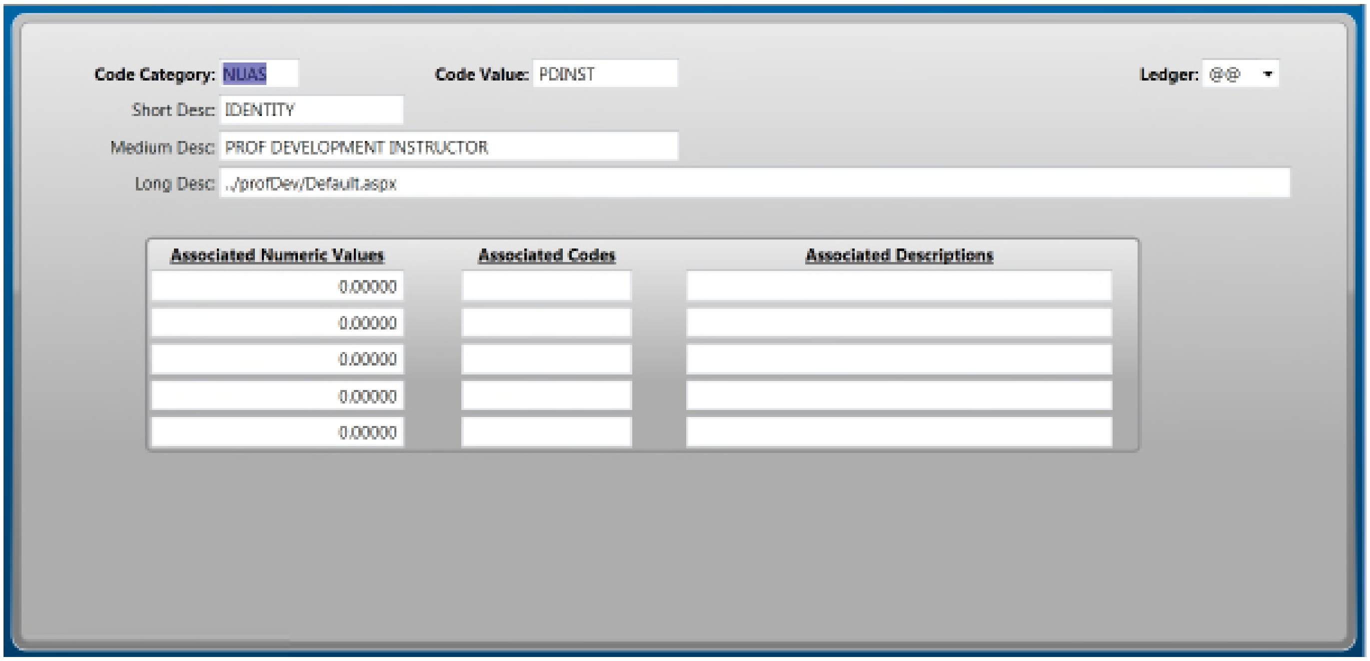
Required Common Codes (NUUPCD)

PDUS/ DEFAULTS: Code Category: PDUS Code Value: DEFAULTS. The Medium Description is used to explain what the common code is created for. Associated Codes 1: ONSITE Associated Codes 2: DBA and Associated Codes 3: @@, need to reflect the setup of the users in NUUPUS. These may be different for your site.



When a user creates a login from the web, their request is sent to the Prof Development Administrator, once the request is approved, they are created in NUUPUS as well as in PEUPPE. The PDUS/ DEFAULT is the common code control the defaults. Two other common codes must be created for the Associations, PDPART for Professional Development Participants and PDINST for Professional Development Instructors. The common codes for the Associations are NUAS/ PDPART and NUAS/PDINST.



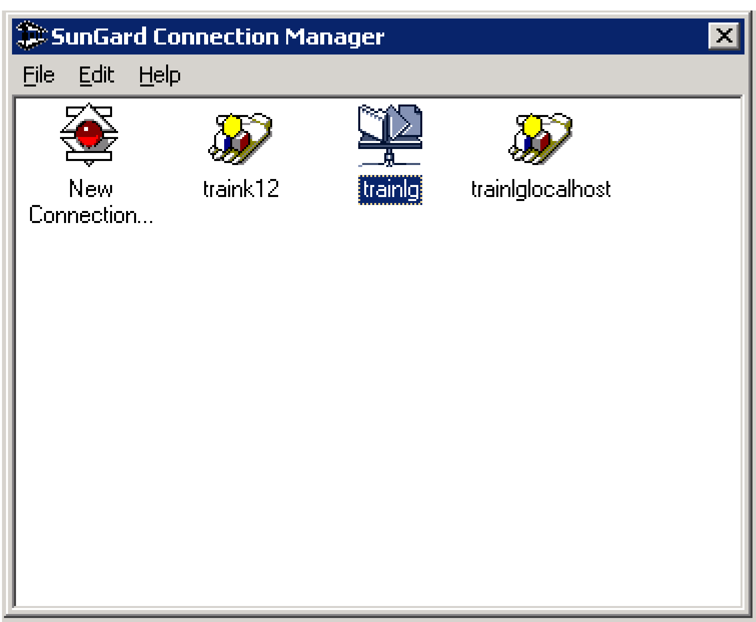


Workflow Models

All base Workflow models that are delivered with PD do not use specific email addresses. In cases where a PD Administrator approval is necessary, the workflow model looks for a user with a “PDADMIN” workflow role. In 7.9, the NUUPUS screen can be used to view/assign workflow roles to a specific user. It is best to use the Administrative Console, which not only provides a plug-in to assign workflow roles to users (i.e., “PDADMIN”), but it also provides the plug-in to define the “PDADMIN” workflow role (the “Manage Workflow Groups” plug-in), which is also a setup requirement.

From the server, access Admin Console

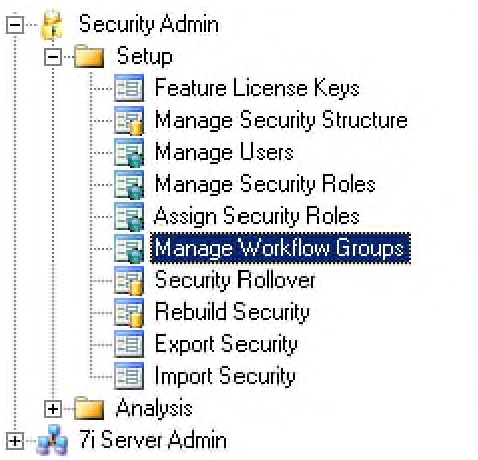
Next access the correct account



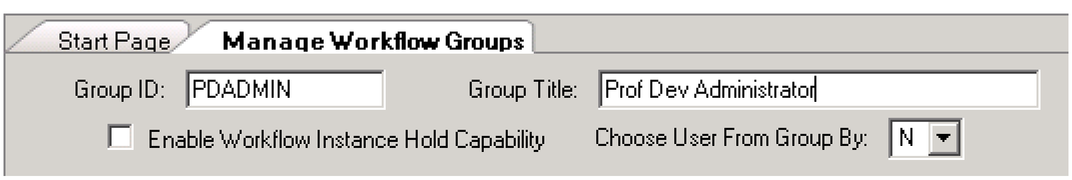
On the left of the screen, in the Administrative Menu, select Security Admin

Select Setup

Next select Manage Workflow Groups



Within Workflow Groups, select the “+” on the top of the screen to add the PDAMIN role.



Hit Enter to save the role.

The Workflow models that need to be installed and Active are:

Non-Employee Participant PD login approval and Verification Email

WF Model = PROFDEVSIGNUP

Instructor Course Definition to Administrator for review/approval & Notify Instructor Course Active

WF Model = PD_COURSE_INSR

Instructor Email Notification to Participants

WF Model = PD_INS_REGMAIL

Course Registration, Drop Course and Wait List processing, and confirmation emails to Participants

WF Model = PD_REGDTL_UPD

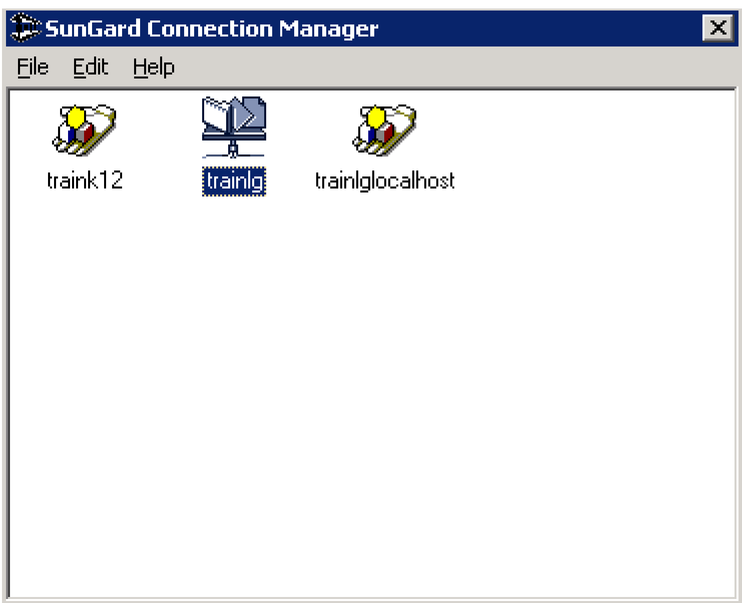
Check Authorization for Participant to Print Certificate of Completion

WF Model = PD_CERT_PRINT

To load the models:

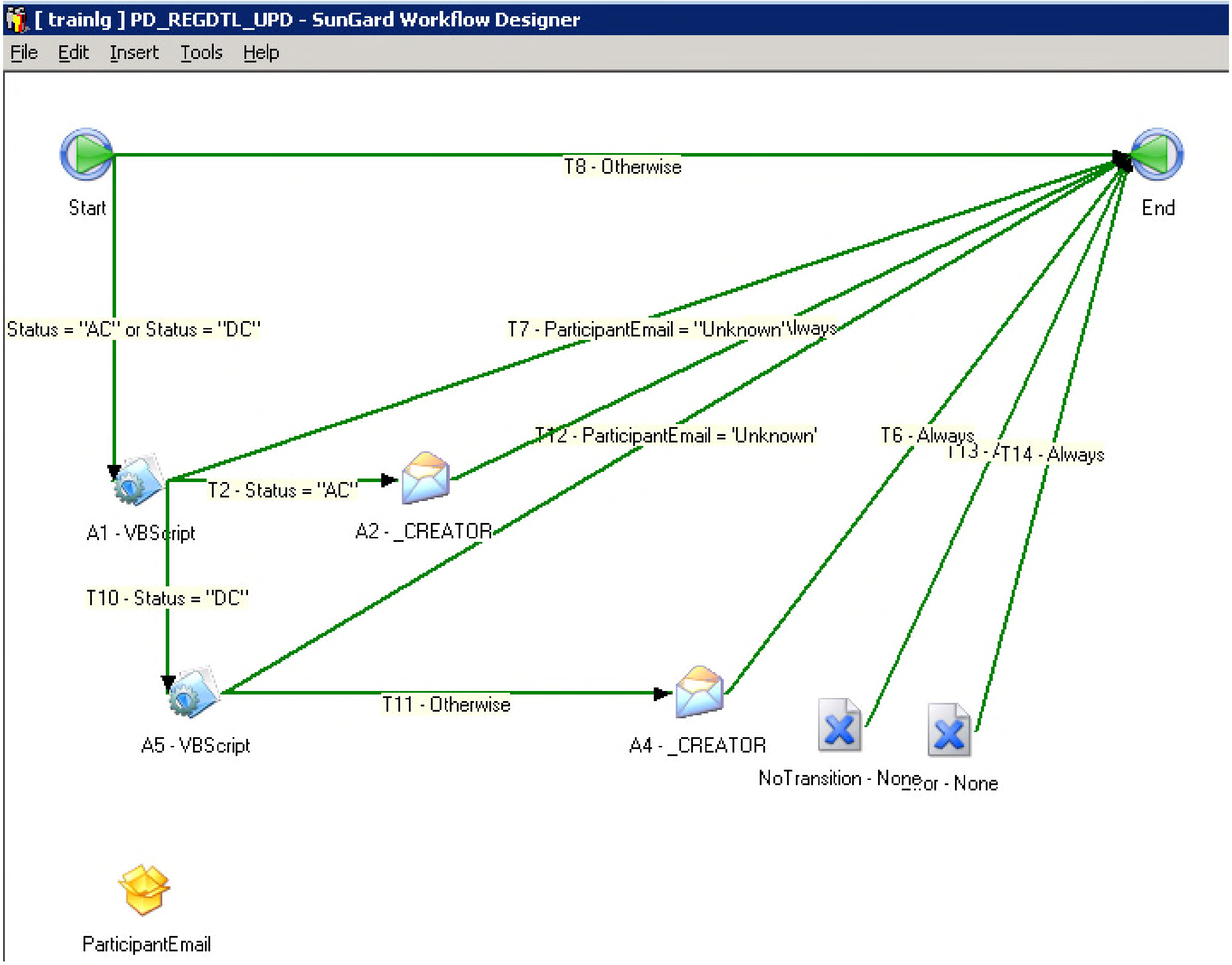
Access WorkFlow Designer on the server

Select the correct connection

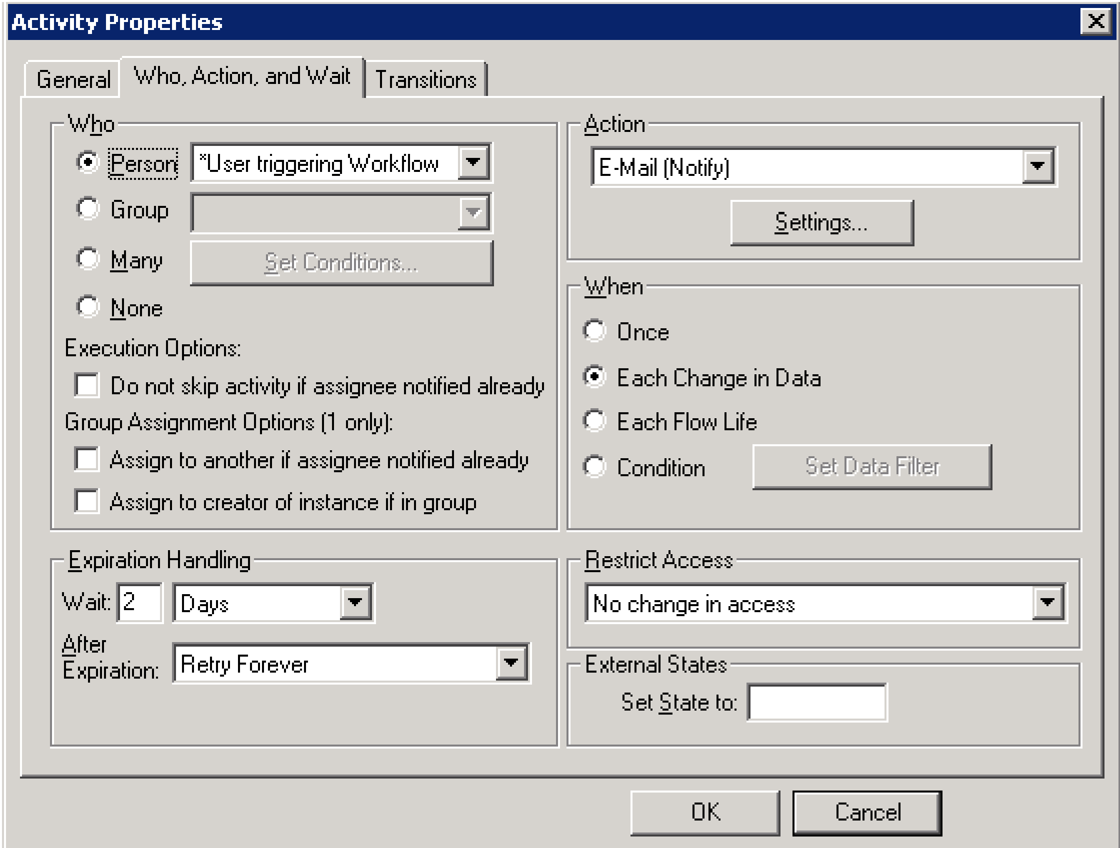


Select File

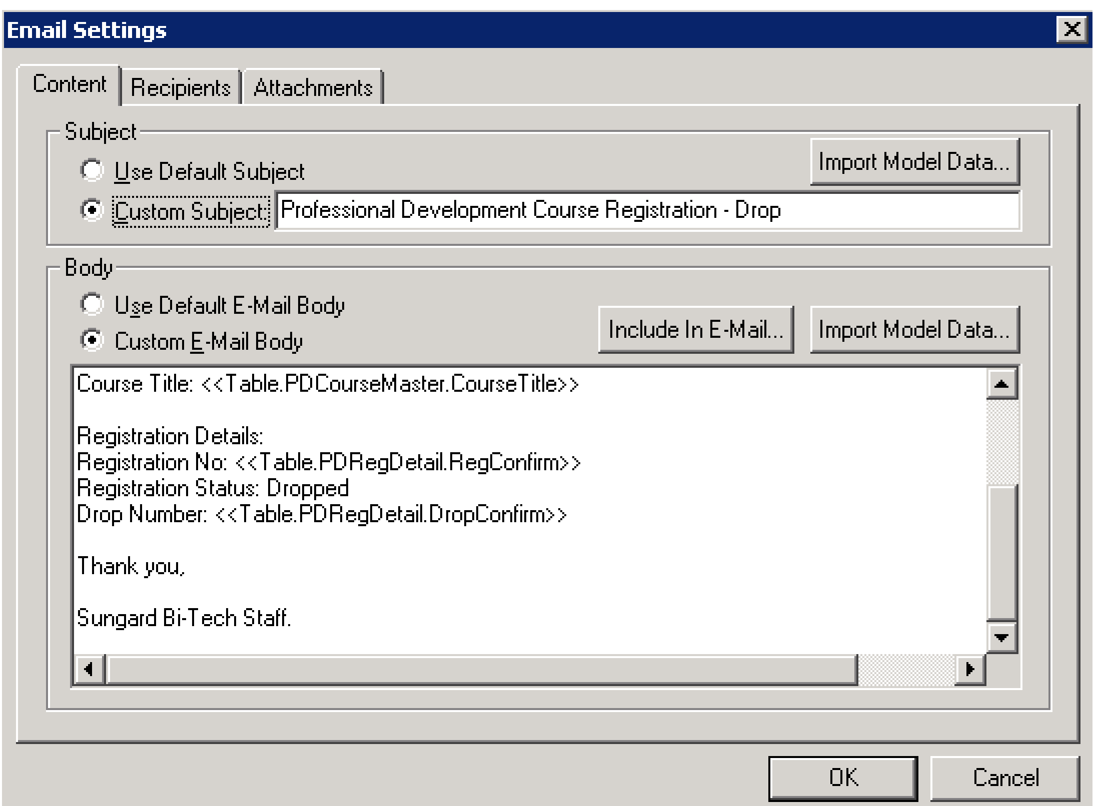
Select Import and browse to where the PD workflow models are being stored and select Open



Where there are envelopes, an e-mail is being generated. Right click on the envelope and select Edit Properties



Select Settings under Action to personalize the e-mails

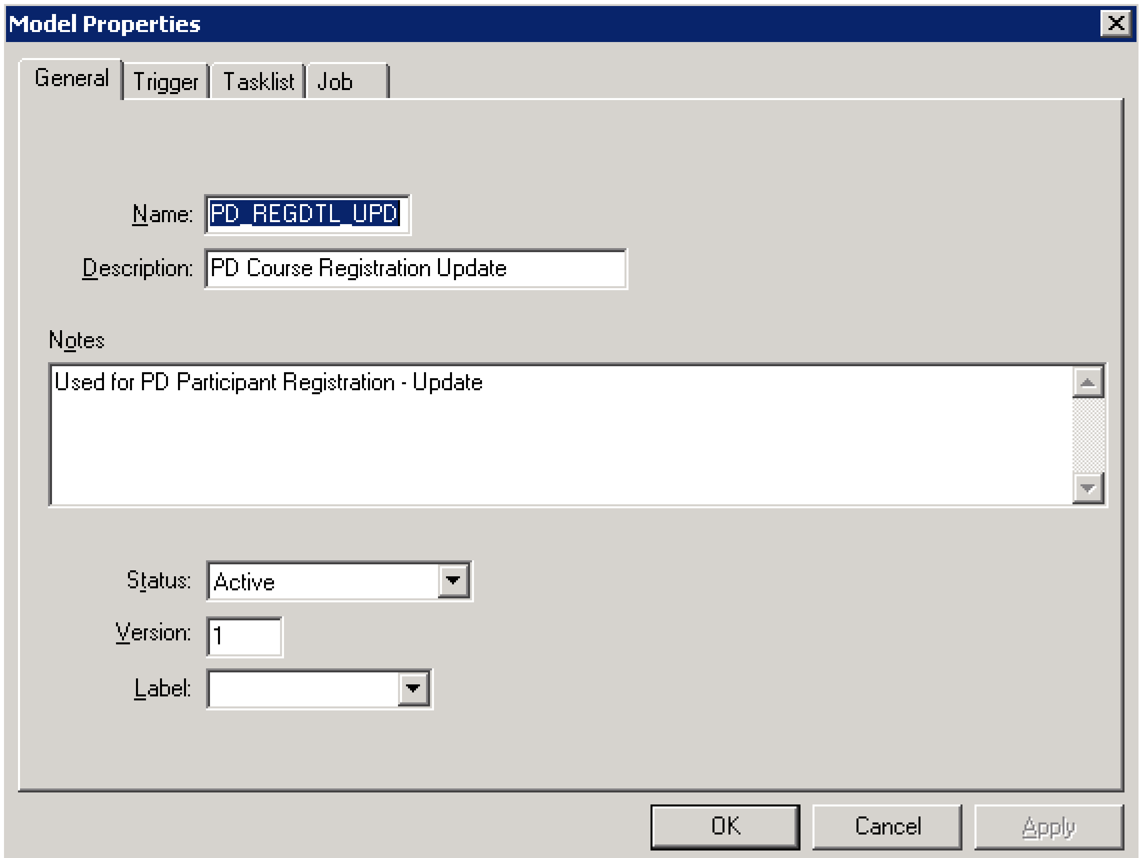


Personalize the signature and select OK

Make sure the model is active by selecting Edit and Model Properties

Status needs to be Active

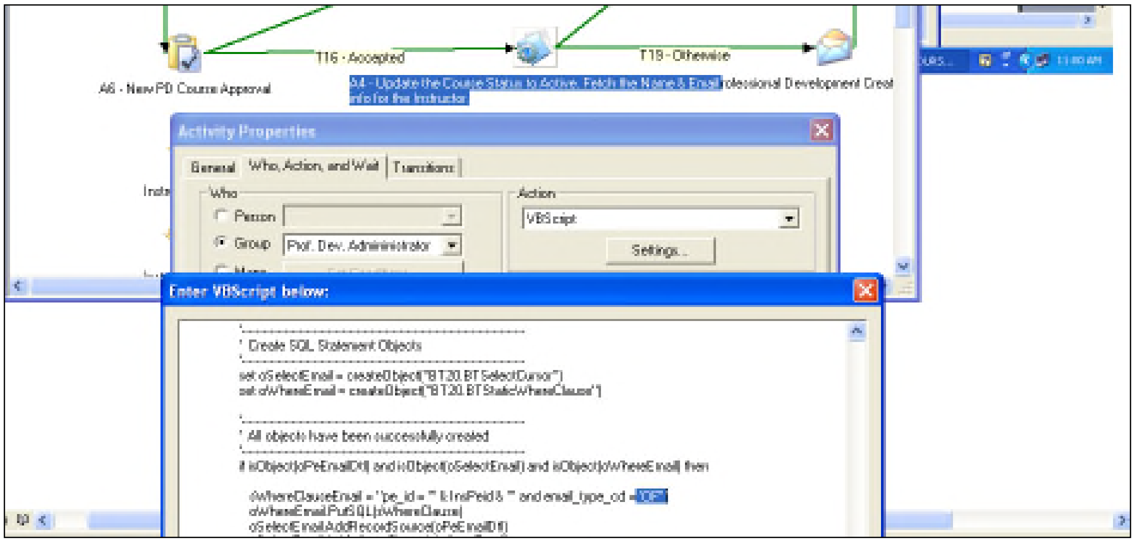
Select OK



Repeat the process for all five models.

Exit WorkFlow Designer

Note: on the PD_COURSE_INSTR model you must make sure the email code is the same as the PEID email code and you need to make sure the Group = Prof. Dev. Administrator



Favorites

Professional Development is a component of Employee Online and will need to have a public favorite's folder created.

http://<server>/finance/ProfDeve/ProfDevFrame.aspx

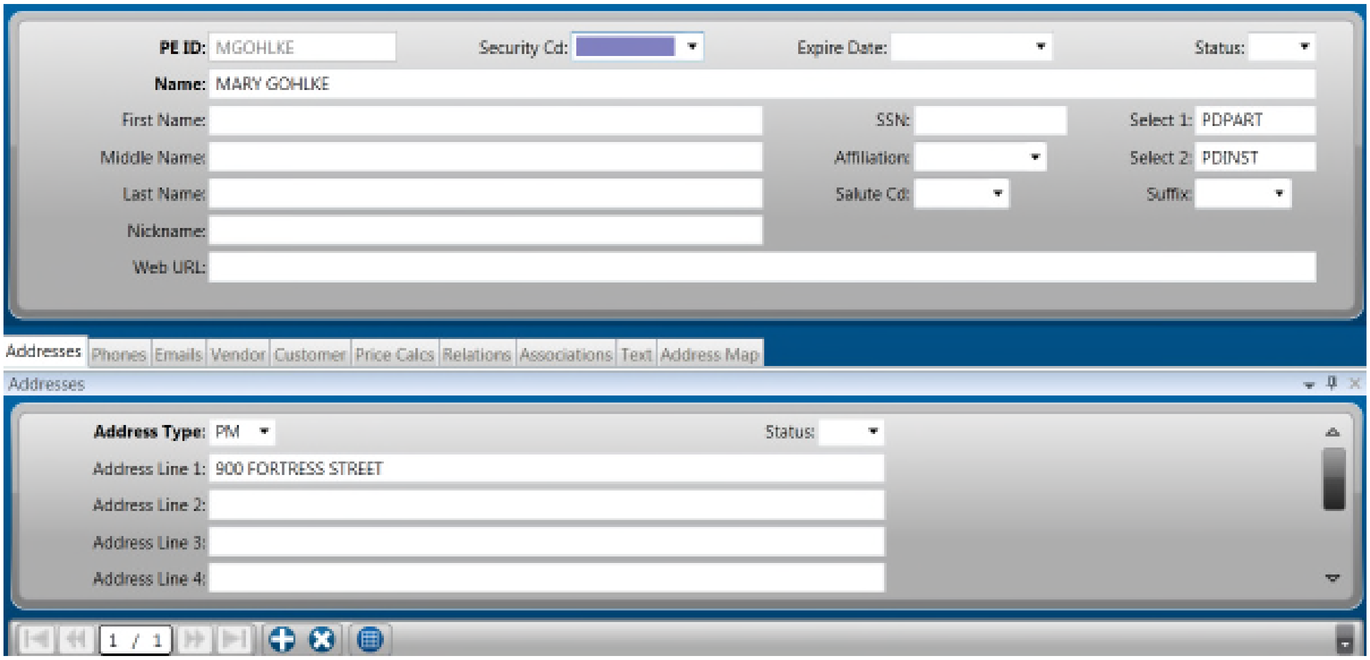
User Setup

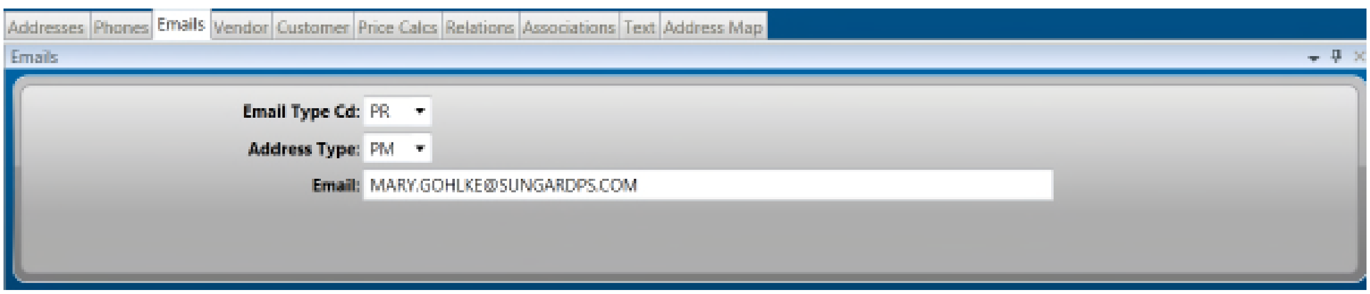
As mentioned above, if a user is created from the web, their records will go in PEUPPE and NUUPPU once the Prof Dev Administrator approves the request. You may also manually enter the users.

PEUPPE

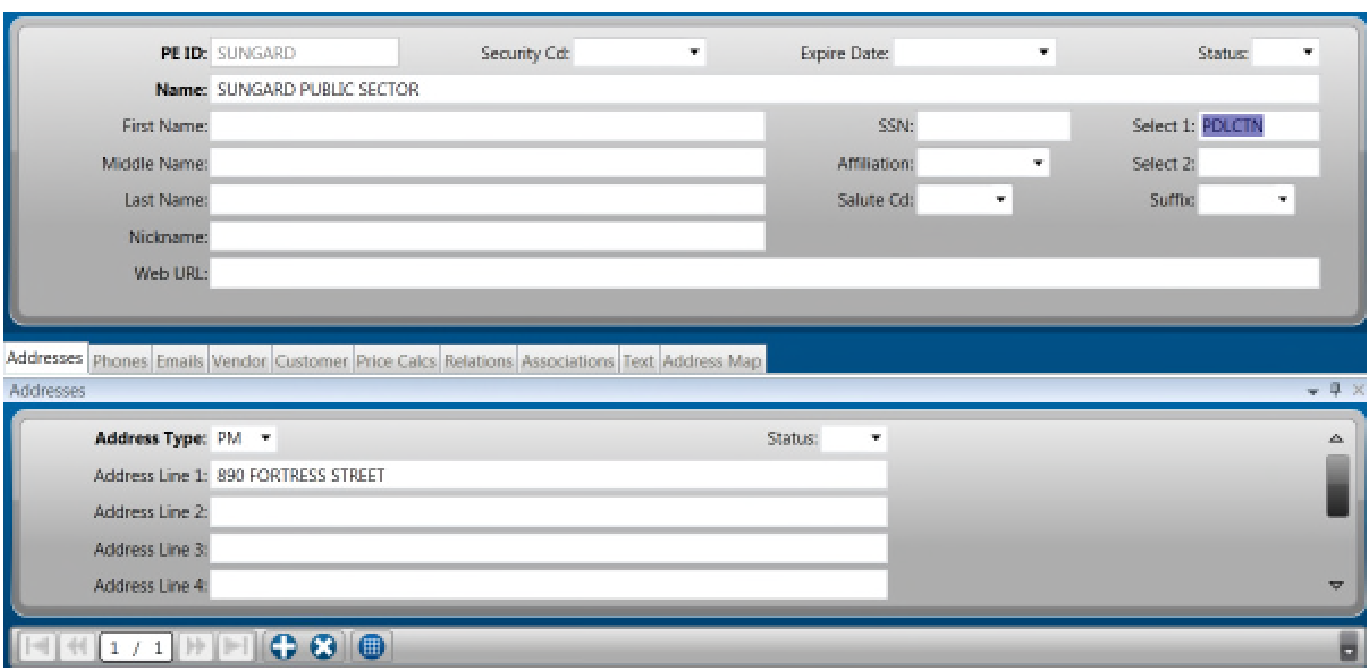
First access PEUPPE (Person/Entity Data Bases + Update Data Bases + Person/Entity Information). Select the '+' symbol at the top of the screen.

The PE ID: must match the NUUPPU User ID: if you are manually creating the user. This will be done through workflow when creating a user from the web. Name is a required field. Select 1 and Select 2 is used for PDPART if the user is a PD Participant, PDINST if the user is a PD Instructor. This will allow our people to be added in HRPDUPCD. A user can have one or both. It is also important that each user has an e-mail address since the system will be using automated e-mails. Select the Emails tab and enter the Email Type Cd: This email type code must match the one in the workflow model PD_Course_Instr. Primary or other user definable options and the users Email address.





All locations that will be used in HRPDUPCD must be defined in PEUPPE as well. Select 1 must have PDLCTN for all locations.



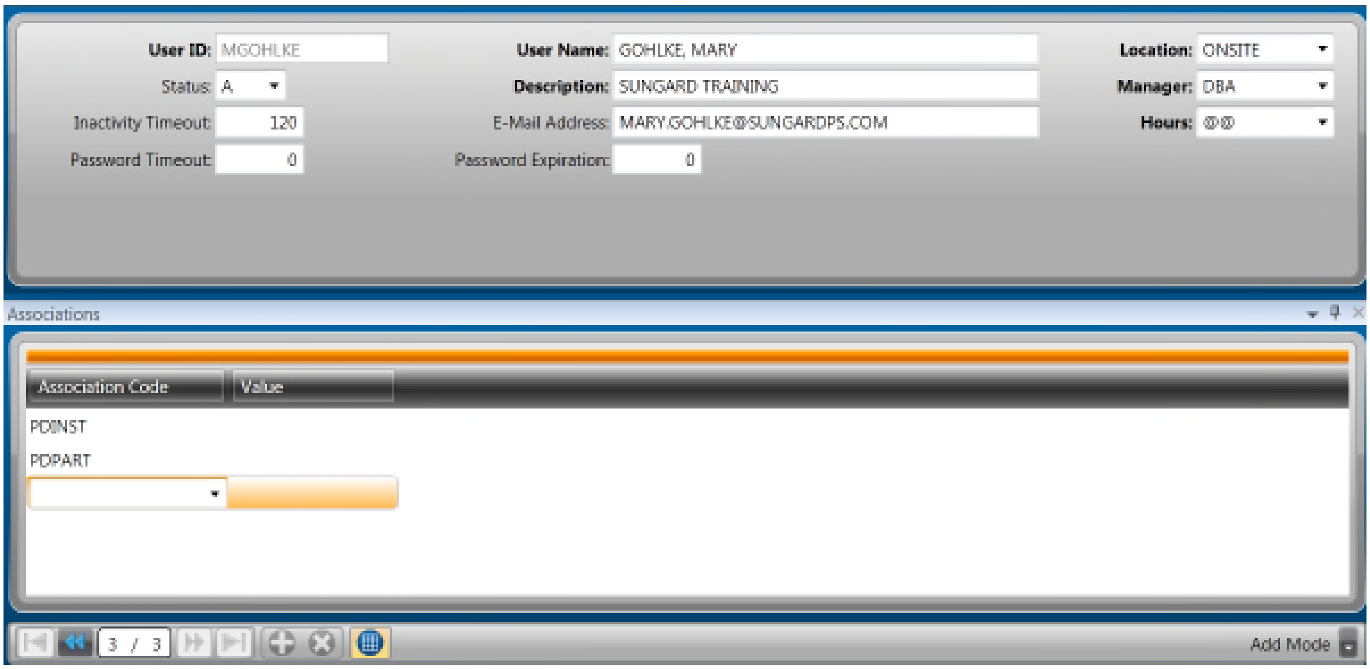
NUUPPU for PDPART and PDINST

The second step of creating a user is entering them into NUUPPU – Portal User

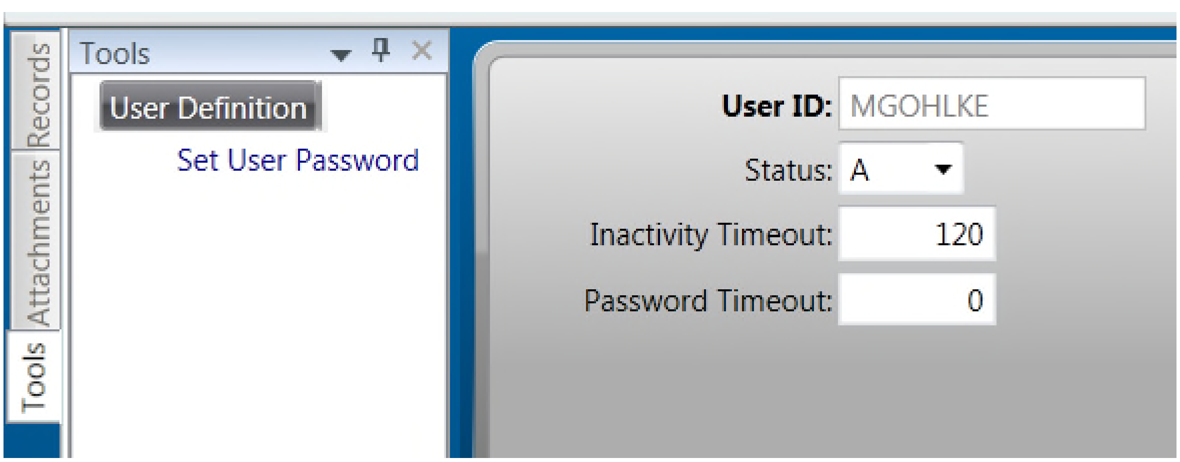
User ID must match the PE ID in PEUPPE. User Name and Description required fields. Location, Manager and Hours must match what was set up in common code PDUS/ DEFUALTS.

All Instructors and Participants should be set up in NUUPPU. Administrators will need to be set up in the SPSONE since they will need a workflow group and security role to access PD screens within OS.

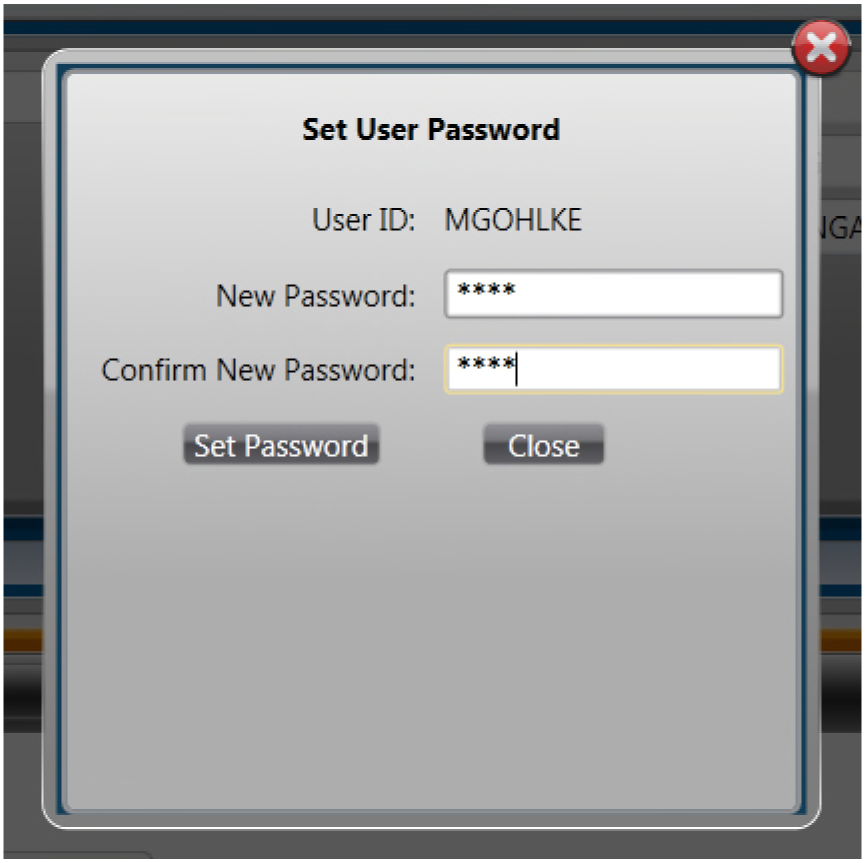
INSTRUCTOR AND PARTICIPANT SET UP:



Select Tools and Set User Password to give the user a password.



Set a password and confirm the password



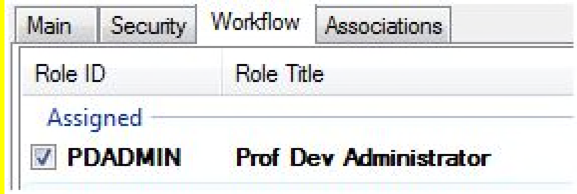
Select Set Password

PD ADMINISTRATOR SET UP:

1. Access SPSONE Console
2. Create the user definition

Select Security tab to delegate the security for the user.

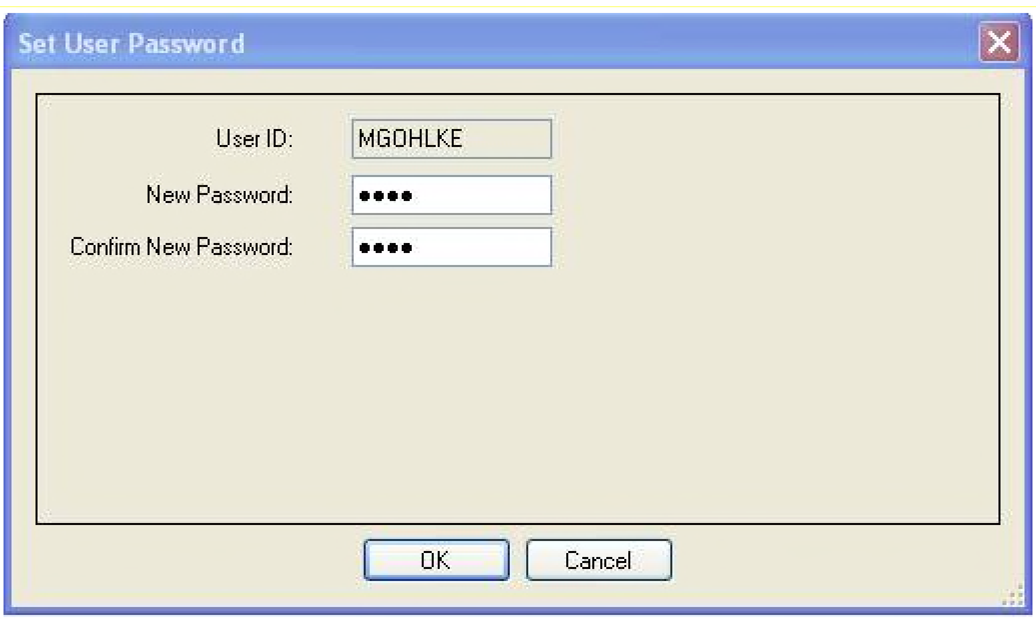
Select Workflow tab if the user is to be the Professional Development Administrator. This user will get notifications when a new user has requested a login from the web.



Select Associations tab. All PD Participants must have a Code of PDPART, PD Instructors must have PDINST. A user may have both. Select the Codes from the drop down and hit ‘Enter’ to save. To add another Code, select the ‘+’ symbol in the lower left hand corner of the tab. Leave the Value blank.

Give the user a password by selecting Tools on the left of the screen.

Select Set User Password and give your user a password. You must confirm the password and hit OK.



Select Rebuild User Security from the Tools and click OK.

If a user creates their login from the web, this process will automatically be generated.

Appendix - Security

Professional Development portal security

The only security necessary for entrance into the Professional Development portal is the establishing of specific association codes in the user definition, available either via NU UP US or the Administrative Console.

Participant security is based solely on an association of “PDPART” in the user definition (NU UP US). The “PDPART” association will give the user access to the participant options within the Professional Development system. All data displayed will inherently be related solely to the logged in participant.

Similarly, Instructor security is based solely on an association of “PDINST” in the user definition (NU UP US). A user may have both

“PDPART” and “PDINST” associations if the user is both an instructor and a participant. Instructors are automatically restricted to information related to courses where they are the instructor. Instructors will not have access to any participant information other than their attendance and grade records associated with the courses where they are the instructor.

Professional Development Finance Screen security

Access to the Professional Development Finance screens (and associated tables) is an administrative user function and controlled via standard menu and table security as defined in the Administrative Console using the “Manage Security Roles” and “Manage Users” plug-ins (see the 7.9 security guide for more information on IFAS menu and database table access).

Dependencies

EO - Employee Online must be implemented prior to any Instructor or Participant access to the module

Workflow – This module must be implemented prior to any PD setup and testing.

HR – If the IFAS Human Resources module is used, employee information required by PD for Instructors and Participants will be drawn from this source first.

PE – The IFAS Person/Entity module is used by sites for PD Instructor and Participant information if they are not employees. The site does not utilize the IFAS HR module for employee information.

Files that need changing

The Certificate needs to be revised with the client's name. The name is loaded in the Certificate.aspx file. Search for "Natrona" in the file. The standard is loaded with Natrona County School District.

The RegistrationConfirmation.aspx file needs to be revised with the client's email. Search for dsa and change dsa@sos.com to the client's email address. The word Participant also needs to be changed – it is spelled incorrectly. Search for Pariticipant and change to Participant.

The RegistrationConfirmation.aspx.cs file needs to be revised to display the participants name correctly.

Replace:

```
Label UserName = (Label)this.FindControl("NameLabel");

UserName.Text = CurrentIfasUserId;
```

With:

```
Label UserName = (Label)this.FindControl("NameLabel");

UserName.Text = CommonUtil.GetPeIdName(dr["PartPeId"].ToString(),"");
```

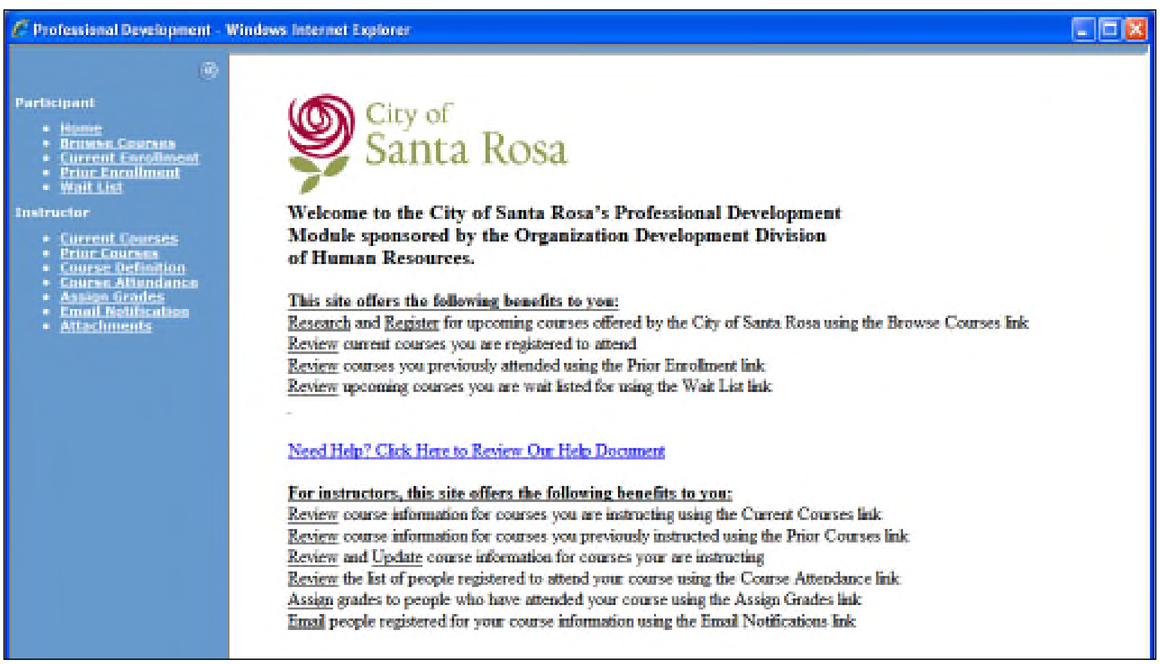
If the instructors email notification is not working (giving you the error message that the BCC is required) you will need to go to the EmailNotification.aspx file in the Instructors folder and remove the following statement:

```
<asp:RequiredFieldValidator id="BCcValidator"
                                    ControlToValidate="bccEmail"
                                    ErrorMessage="Bcc is a required field."
                                    Display="None"
                                    runat="server"/>
```

If you are changing the email code you will have do revise the Emailnotification.aspx file to the correct email code

```
<DataObject ProgID="BT20.PEEmailDetail">
    <Join>
        <JoinProp BT20OBJ="BT20.PDRegDetail" From="PeId" To="PartPeId" />
    </Join>
    <WhereClause>
        <WhereParam Prop="EmailTypeCd" Value="HO" />
    </WhereClause>
</DataObject>
```

The home.aspx file needs to revised with the client specific information. See below for the City of Santa Rosa example – in the file they have a link to the logo picture which they placed in Customize folder:



Section 11: Position Budgeting User Manual

Section 12: Position Budgeting Set Up

Objective: Position Budgeting (PB) system creates a budget for the next fiscal year based on the existing data from the Human Resource (HR) and Payroll (PY) systems. A "**Model**" is created for Position Budgeting and the data is imported into the "**Model"** created, from Human Resource (HR) and Payroll (PY) systems. Several models may be created and used simultaneously for various Client Specific Objectives.

The PB system provides very flexible utilities that enable the imported data to be manipulated until the desired budget results are attained.

Since the HR and PY data is imported into the PB system there is no danger of affecting live HR or PY data.

A high-level, step-by-step process of Calculating the Budget:

A) Complete the Data import screens **(PBSTRQ – Position Budgeting Set up Screen)** in the module to indicate what data is to be imported and what data manipulations are to be performed by the import program.

B) Import data into a PB model using the PB Utilities, PBMDHR – Import Data into Model from HR & PBMDPY – Import Data into Model from PY.

C) Review the imported data.

D) Calculate the model to attain the current budget amounts.

E) Review the calculation results using the PBGLCR screen and/or by the supplied reports.

F) Copy the model to another model prior to performing any data manipulations. This is simply for the sake of performance. If the data manipulations performed on a model do not provide the desired results and the process must be re-started, then without a copy of the original imported model, the full import would have to be run again. The performance difference is that it is much faster to copy a model than it is to perform a full import into a model. This is due to the deletes that must occur prior to importing data into a model and due to the manipulations that occur while the data is being imported.

G) Modify the imported data with the provided utilities and calculate the model until the desired budget is created.

H) Complete the budget flat-file control screen (PBGLMB – Make GL Budget) to populate certain fields in the budget file and to indicate what type of rounding, if any, should be performed on the calculated amounts.

I) Create the GL budget flat-file which can then be disbursed to the GL (PBGLBU) or to Budget Item Detail (PBUTBD).

Each of the steps listed above are fully explained throughout the remainder of the documentation.

Position Budgeting Features

Automatically “roll” changes made to salary and benefit tables through the system.

Maintain salaries, benefits and overtime based on full-time equivalencies (FTE).

Support salary saving calculations when installed with Payroll.

Assign salaries and benefits to multiple General Ledger and Job Ledger accounts within a single position assignment.

Automatically maintain salary “step” increases.

Maintain salaries as annual, monthly, bi-weekly, or hourly figures.

Define benefits as a percentage of salary or a straight-dollar amount. Different benefits can be defined for regular and overtime pay.

Adjust salary budgets up or down by a fixed percentage with “fudge factor” capability.

Assignments are date-sensitive; i.e., next year’s structure may be reorganized without affecting the current year.

Set salary and FTE limits at the job and/or position level.

Budget unfilled positions (vacancies).

Integrated with General Ledger, Budget Item Detail and Job Ledger; create monthly or annual budgets based on position assignments.

Set up scenarios to adjust salaries by percentages and report “what if” information.

Human Resources information is maintained for reporting purposes.

PB Process

Complete the Data Import Screens

Use the PBSTRQ module to indicate what data is to be imported and what data manipulations are to be performed by the import program.

The first step in the PB process is to complete the PB Setup Screens listed below.

PBSTRQ - Setup Position Budgeting.

PBSTCD - Default CDH Rate/Information.

PBSTEL – Employee Ledger Security.

PBSTIS – Import Support Information.

PBSTMA – Overtime Information.

PBSTML – Model Lock Information.

PBSTWK – Workers Compensation Info.

PBSTRQ - Setup Position Budgeting.

This Screen consists of the following tabs for the input information which governs the import process.

Create model definition

Set up global data.

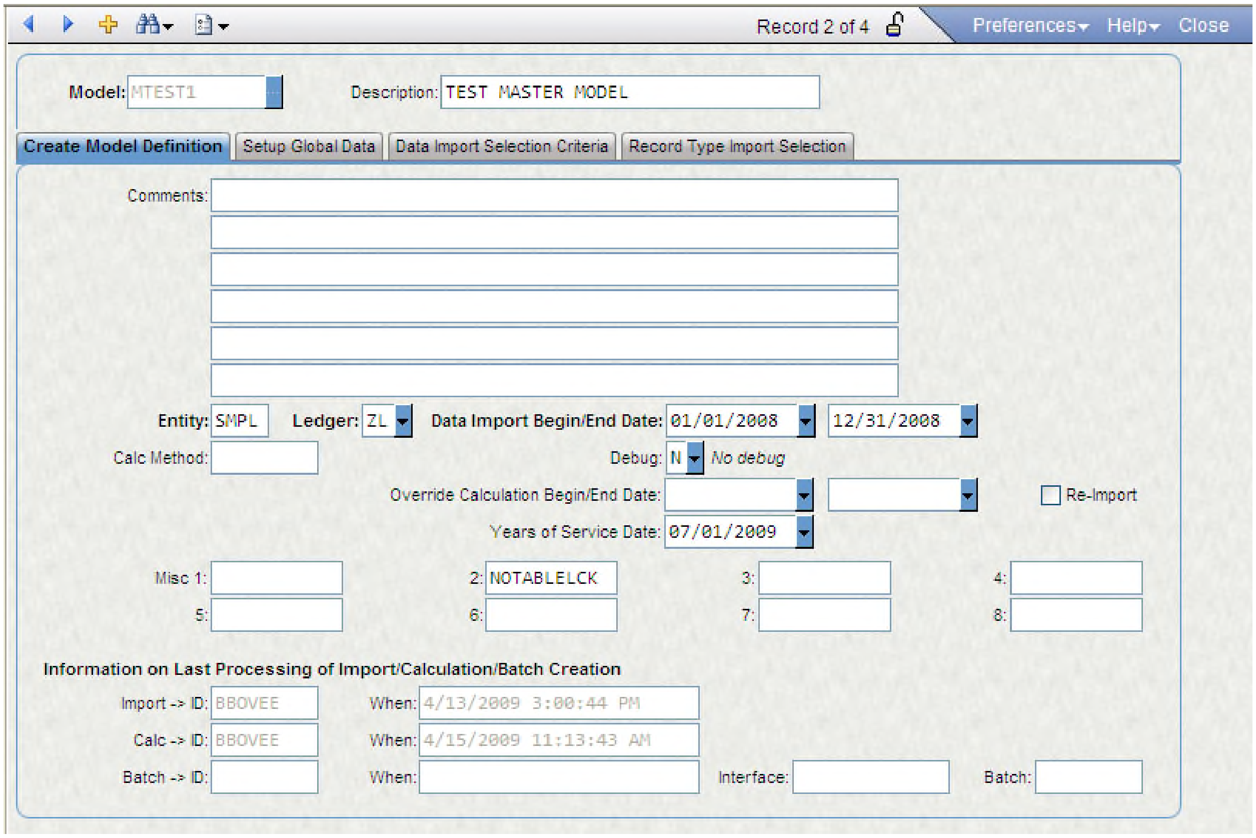
Data import selection criteria.

Record type import selection.

PBSTRQ - Create model definition

Create Model Definition tab is used to create a model's definition. The screen can also activate several special functions in the import and

calculation program.



Field Descriptions

Model: Enter a Model name. The Model name uniquely identifies records that belong to a model. A new model can be added just by clicking the ADD Icon or a model can be selected from the Find option.

Description: Enter a description for the model. The description will be displayed on all screens that have the Model field.

Comments: Information about the model can be entered in the comments field. This is very helpful in remembering what

modifications were done to the data within a model.

Entity: Enter an Entity ID. If a site has multiple entities, then a model for each entity will have to be created.

Ledger: Enter the general ledger code is entered. This varies per site, but often it is GL.

Data Import Beg/End Dates: Enter a **Data Import Begin and End date**. When creating a future budget these dates usually represent the

dates of the current fiscal year. Note that the PB system is designed to project a future budget based on current information.

Calc Method: The Calc Method field is only used if a client has paid for a customization to the calculation program. If such a customization

has been made, then the client ID would be entered into the Calc Method field. Otherwise, it will be left blank

Debug: This field is used to display debug information regarding the import or calculation process. Set this field to "1" for import debug.

If, for example, the import process fails with a 4gl error, **then the record that caused the failure will be the last item displayed**. The data

in that record can then be verified for accuracy. Set this field to "2" for complete calculation debug. Because of the extensive amount of

Information displayed, it is suggested to only run option 2 when calculating a single employee or a small group of employees. How to

control the number of employee's that will be calculated will be explained later. Set this field to "3" to display only Worker's Comp

calculation debug.

Override Calc Begin: Normally, the Data Import Dates are used as the model calculation dates. If though, the cost for a specific date range is

needed, then an override calculation begin date may be entered. If entered, this date must be greater than the Data Import Begin Date. If

this field is left blank, and then the Data Import Begin Date will be used as the calculation begins date.

Override Calc End: Normally, the Data Import Dates are used as the model calculation dates. If though, the cost for a specific date range is

needed, then an override calculation end date may be entered. If entered, this date must be less than the Data Import End Date. If this

field is left blank and then the Data Import End Date will be used as the calculation end date.

.

Re-Import: This field is used to perform a special import after a normal import has been performed. When this field is set to "Y" (check mark), then only the employees that meet the model's selection criteria will be deleted and re-imported. For example, if the selection criteria on

Data Import Selection criteria Tab was changed to only import a specific bargaining unit, and then only those employees assigned to that bargaining unit will be deleted and re-imported.

Years of Service Date: This date is used to calculate years of service for the following employee master (HREMEN) dates: Original Hire, Hire, Leave, Separation, Dist Sen., POS/PCN Sen., and Longevity. These years of service are written to the Employee Information screen (PBUPEM) and may be referenced by the PB utilities and Import Support Information (PBSTIS) screen.

Misc Fields 1 - 8: The eight Misc fields may be used to store any 10 character (max) client desired misc codes. The Misc fields also have

pre-defined codes that activate special functionality in the import and calculation programs. The codes and a description of the

functionality that the codes activate are displayed below:

MORESELCRI: This code is used when there isn't enough room on Data Import Selection criteria Tab to Enter all desired selection criteria. When the data is being imported into PB, the user will be prompted for additional selection criteria. This applies to the Global, Pay, Benefit, Misc Cont, and Salary select statements (not supported in version 7.9).

FTE=APU1: This code is used to set the PCN FTE equal to APU1 when importing records from the Employee Pay Assignment to the PB pay assignments. Note: since Quickpay does not have APU values, the FTE is still used for Quickpay records.

FTE=APU2: This code is used to set the PCN FTE equal to APU2 when importing records from Employee Pay Assignments to PB pay assignments. Note: since Quickpay does not have APU values, the FTE is still used for Quickpay records.

Note: do not enter both FTE=APU1 and FTE=APU2 into the Misc fields. If this is done, then the FTE=APU2 code will be used.

USEINDEX: This code is used to always import the salary index from the HR pay assignments when inserting records into

PB pay assignments (PBUPEM – Employee Information Screen). Normally, the salary index is not imported for pay assignments with the salary override field set to 'Y' or for pay assignments attached to salary indexes that are a Min/Max type. Salary indexes are not imported for these pay assignments because the amounts have been hand keyed. Thus, the amounts do not necessarily correspond to the amount on the salary table for the salary index entered on the pay assignment. PB calculates salaries based on the salary index or the flat salary field. If you want the salary index to be imported for overridden pay assignments you would select this option.

REORDERSAL: This code is used to re-order a salary table so that each step on the salary table is the next logical step when performing

step increases (if not already set-up that way). If this code is used, then the Misc field at the end of each salary index on Salary Table Information screen (PBTBSL), that is to be re-ordered, must contain a new step. All salary indexes that were marked for re-order will be changed on Salary Table Information screen (PBTBSL) and (PBUPEM – Employee Information Screen – Pay Assignment tab).

NOTABLELCK: This code will prevent the PB system from locking tables in exclusive mode. Normally, when importing data, calculating

a model, or while running a utility, the PB system locks tables in exclusive mode. The advantage to this is that while a table is locked

exclusively, no other process may update the data in that table. This ensures the integrity of the data. The disadvantage is that no other

process may update the table while it is locked. Thus, if a model is being imported and another model is having a utility run on it, then

locking errors can occur. The client needs to decide whether absolute data integrity or allowing users the ability to update tables

simultaneously is more important.

BENERATFTE: This code applies to the Calc Pay Assgn Ratio FTEs utility (mask PBUTCR). It will cause the ratio FTE sum value calculated from an employee's pay assignments to be written to the Misc4 field on PBUPEM – Benefits screen. The ratio FTE sum may then be used, via an SQL statement in PBUPSS and PBTBPU, to prorate a benefit amount/percent value.

Example SQL: Update pcbencod set amount = amount * misc4 where cdh = "1654"

BENERATHRS: This code applies to the Calc Pay Assgn Ratio FTEs utility (mask PBUTCR). It will cause the ratio hours sum value

calculated from an employee's pay assignments to be written to the Misc3 field on PBUPEM – Benefits screen. The ratio hours sum may then be used, via an SQL statement in PBUPSS and PBTBPU, to prorate a benefit amount/percent value.

Example SQL: Update pcbencod set amount = amount * misc3 where cdh = "1654"

FLAT*RT%: This code will make the system multiply the value in the Flat Slry field by the value in the RT% field. Normally, this

only happens for the amounts that are tied to salary indexes.

PRORTESAL$: This code will make the system multiply the value in the Fixed Salary Amount field by the calculated date ratio for a pay assignment. Normally, this does not happen.

WA: Only clients in the state of Washington use this code. It causes the import program to import retirement information from

RETIREWA instead of RETIRECA.

Import ID: This field is system derived and displays the ID of the user that performed the most recent data import into the model. If

the When field, following the Last Import ID field, is blank, then the Last Import ID field will contain the ID of the user that created the

PB Model entry.

When: This field is system generated and denotes the last time that data was imported into the model.

Last Calc'd ID: This field is system generated and displays the ID of the user that last calculated the model.

When: This field is system generated and denotes the last time that the model was calculated.

Batch ID: This field is system generated and displays the ID of the user that last interfaced the model.

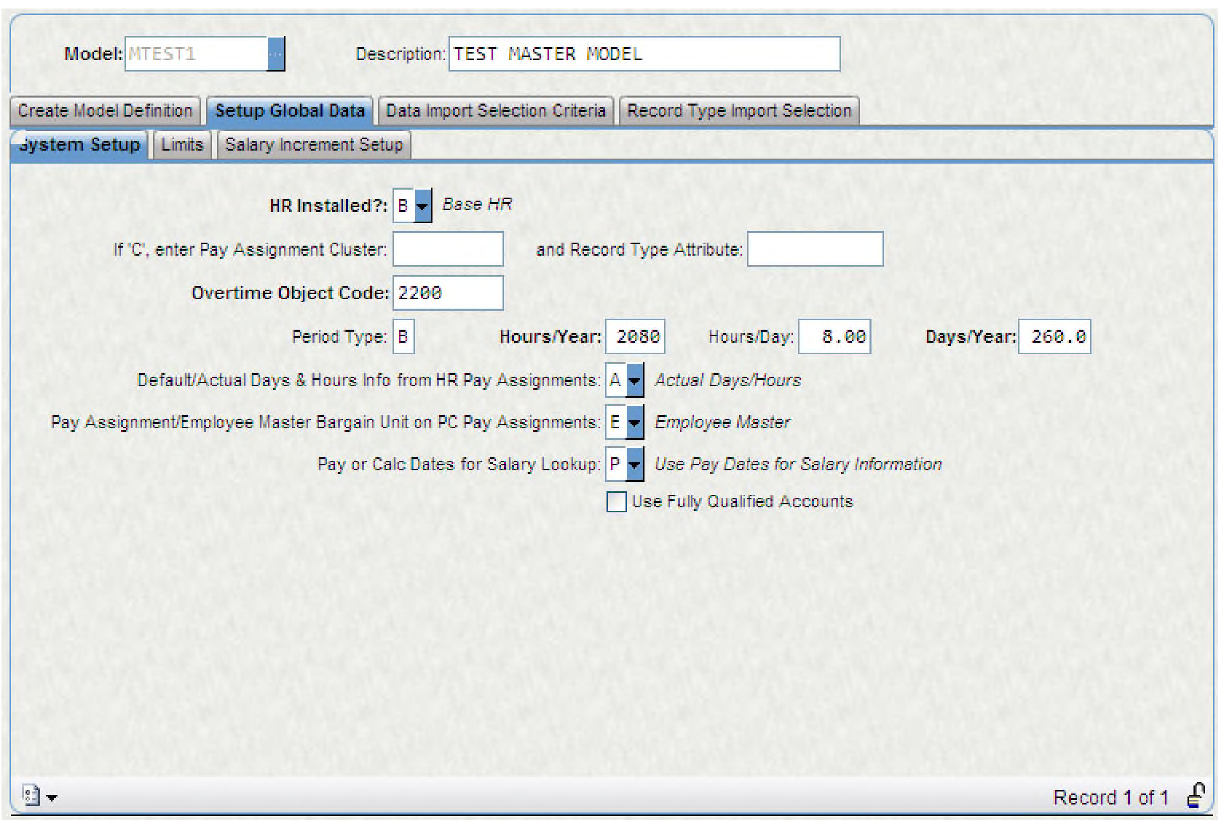
When: This field is system generated and denotes the last time that the model was interfaced.

Interface: This field contains the interface file name.

Batch: This field contains the batch name for the interface file.

PBSTRQ - Setup Global Data

These screens contain default information used by the import and calculation programs.



System Setup

Field Descriptions:

Model ID: Enter the Model ID. If the client determines that all or many of the models would have the exact same entries on PB set up screens, then each model does not need to have an entry on the PB set up screens. A default entry, with a Model ID of ROOT, may be entered. All models that do not have an entry on PB set up screens will use the information from the ROOT entry. Note: before the Model ID of "ROOT" can be entered, it must first be entered into the PB MODEL screen.

HR Installed: Enter a "B" if the IFAS Base HR system is installed. Enter a "C" if a custom HR system is installed. Enter a "P" if only payroll is installed.

Pay Assgn Cluster: If a custom HR system is installed, then enter the name of the pay assignment cluster. Usually this would be

"PAYASSGN", but verify the name if a custom HR system is installed.

Record Type Attr: If a custom HR system is installed, then enter the name of the attribute that denotes the record type. Usually this is RECTYPE or REC_TYPE, but verify the name if a custom HR system is installed.

Overtime Object Cd: Enter a default overtime object code. This object code will be used if an org key and amount/percent is entered on the PB Overtime screen without entering an object code or CDH#.

Period Type: Enter a default period type. This value is used by the calculation program to determine a number of periods for any entry on PCBENCOD with an AXP of "P" or on PCPAYTBL that is attached to a salary index with an AXP of "P" and with a "P" in the "Period Tp" field on PCPAYTBL.

Hours/Year: If a record on PCPAYTBL has 0 Days or 0 Hours and is attached to a salary index with an AXP of "H" (these pay assignments are calculated using: rate * days * hours), then this value will be used as a default number of annual hours when calculating the pay assignment. A warning message will be displayed indicating this value is being used. If this field is blank, then 2080 will be used as the default annual hrs.

Hours/Day: When entering a record on PBVACPOS, this value will auto-fill the "Hours" field after the cursor leaves the "Model ID" field.

Days/Year: When entering a record on PBVACPOS, this value will auto-fill the "Days" field after tabbing from the "Model ID" field. Also, if a PCPAYTBL record has 0 Days and is tied to a daily amount salary table, this value will be used as a default amount of annual days. If left blank, then 260 will be used.

(D)efault/(A)ctual Days/Hours Info from HR Pay Assignments: This field lets the user choose whether to use actual or default hours per day and days per year information. This is only used when an employee's pay assignment is attached to a salary table that is expressed in hourly amounts. The hourly amount from the salary table is multiplied by the hours per day and then that figure is multiplied by the days per year to determine an annual salary for the employee. If budgeting is determined based on default information then choose "D", otherwise choose "A" to budget by actual amounts from EMPPAY. If "D" is chosen, then for PAYALT records (these records don't have default days/hours information) the user will be prompted whether the actual days/hours info from Quickpay or the days/hours info from the Position Control Number Definition table should be used. The default is "A" if this field is left blank.

Pay Assignment/Employee Master Bargaining Unit on PB Pay Assignments: This field lets the user control where the bargaining unit on PB pay assignments will be imported from. If "E" (HREMEN) is chosen, then if an employee has multiple pay assignments (e.g. PM, R0, S0, etc.), all of them will be populated with the employee's bargaining unit from the employee master. IF "P" (pay assignments) is chosen, then the bargaining unit on each pay assignment will be imported into PB. The default is "E" if this field is left blank.

Use Fully Qualified Accounts: Enter a check mark in this field if fully qualified accounts are set up in the GL. A check will activate the

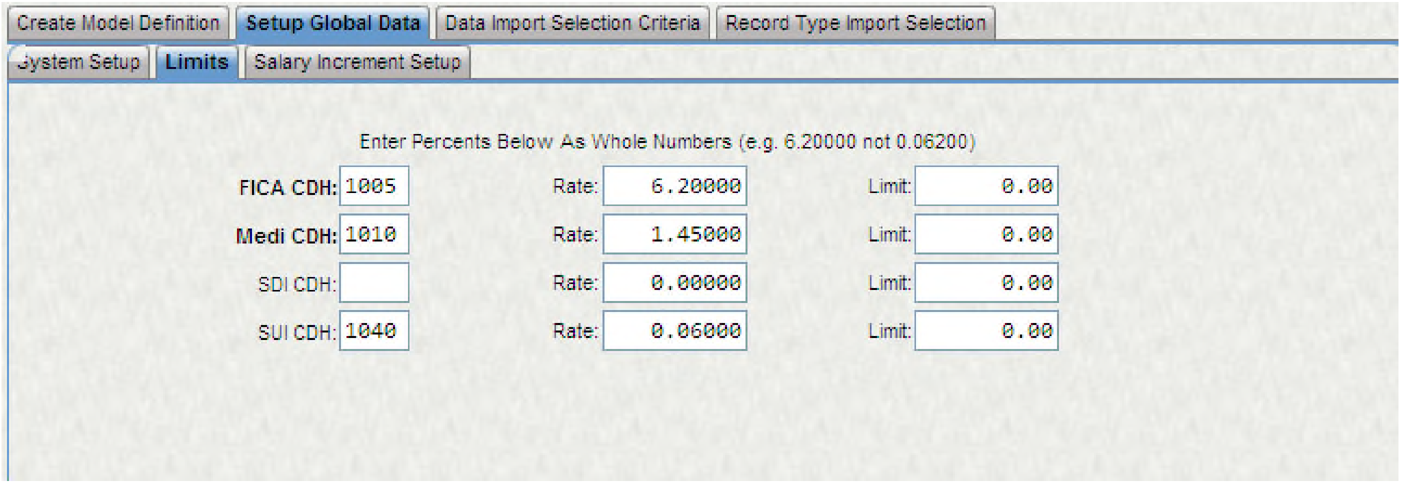
fully qualified code in PB.

Pay or Calc Dates for Salary Table Lookup: Enter a "P" if pay dates are used or a "C" if calc dates are to be used in PB for salary table

lookups.

Use Fully Qualified Accounts: Enter a check mark in this field if fully qualified accounts are set up in the GL. A check will activate the fully qualified code in PB.

Limits



FICA CDH: Enter the CDH associated with FICA (if it hasn't been auto filled. The FICA, Medicare, SDI, and SUI CDHs should auto-fill after the cursor leaves the Model ID field in ADD mode. The CDHs are selected from the PY database using Miscellaneous Code 1 as selection criteria. FICA, for example, will have a code of "FICA" in Miscellaneous Code 1.)

FICA Rate: Enter the rate (percent) associated with FICA. Be sure to enter the rate as a whole number (e.g. 5% would be entered as 5.00000, not 0.05000).

FICA Limit: Enter the FICA limit. The limit represents the annual dollars that will be paid on behalf of an employee. It is not the limit on applicable wages.

Medi CDH: Enter the CDH associated with Medicare (if it hasn't been auto filled. The FICA, Medicare, SDI, and SUI CDHs should auto-fill after the cursor leaves the Model ID field in ADD mode. The CDHs are selected from the PY database using Miscellaneous Code 1 as selection criteria. Medicare, for example, will have a code of "MEDI" in Miscellaneous Code 1.)

Medicare Rate: Enter the rate (percent) associated with Medicare. Be sure to enter the rate as a whole number (e.g. 5% would be entered as 5.00000, not 0.05000).

Medicare Limit: Enter the Medicare limit. The limit represents the annual dollars that will be paid on behalf of an employee. It is not the limit on applicable wages.

SDI CDH: Enter the CDH associated with SDI (if it hasn't been auto filled. The FICA, Medicare, SDI, and SUI CDHs should auto-fill after the cursor leaves the Model ID field in ADD mode. The CDHs are selected from the PY database using Miscellaneous Code 1 as selection criteria. SDI, for example, will have a code of "SDI" in Miscellaneous Code 1.)

SDI Rate: If SDI is a contribution, then enter the rate (percent) associated with SDI. Be sure to enter the rate as a whole number (e.g. 5% would be entered as 5.00000, not 0.05000).

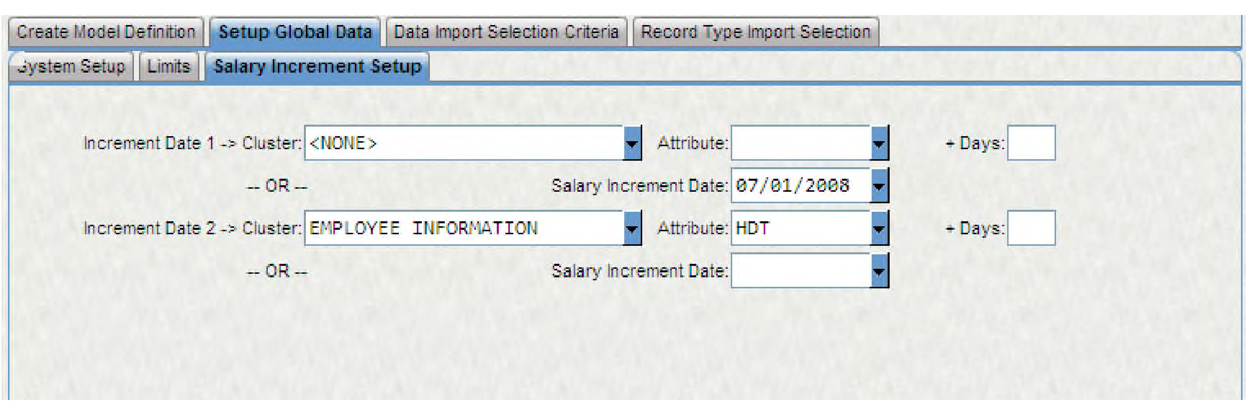
SDI Limit: Enter the SDI limit. The limit represents the annual dollars that will be paid on behalf of an employee. It is not the limit on applicable wages.

SUI CDH: Enter the CDH associated with SUI (if it hasn't been auto filled. The FICA, Medicare, SDI, and SUI CDHs should auto-fill after the cursor leaves the Model ID field in ADD mode. The CDHs are selected from the PY database using Miscellaneous Code 1 as selection criteria. SUI, for example, will have a code of "SUI" in Miscellaneous Code 1.)

SUI Rate: If SUI is a contribution, then enter the rate (percent) associated with SUI. Be sure to enter the rate as a whole number (e.g. 5% would be entered as 5.00000, not 0.05000).

SUI Limit: Enter the SUI limit. The limit represents the annual dollars that will be paid on behalf of an employee. It is not the limit on applicable wages.

Salary Increment Setup



Inc Date1&2 Cluster, Attr, + Days, and Salary Inc Date: The next eight fields are related to step increases for pay assignments and control how two effective date fields will be populated on PB pay assignments. If step increases are based on an employee's hire date or anniversary date (or another date that is stored on one of the clusters in the pick list) then the cluster and attribute of the date field may

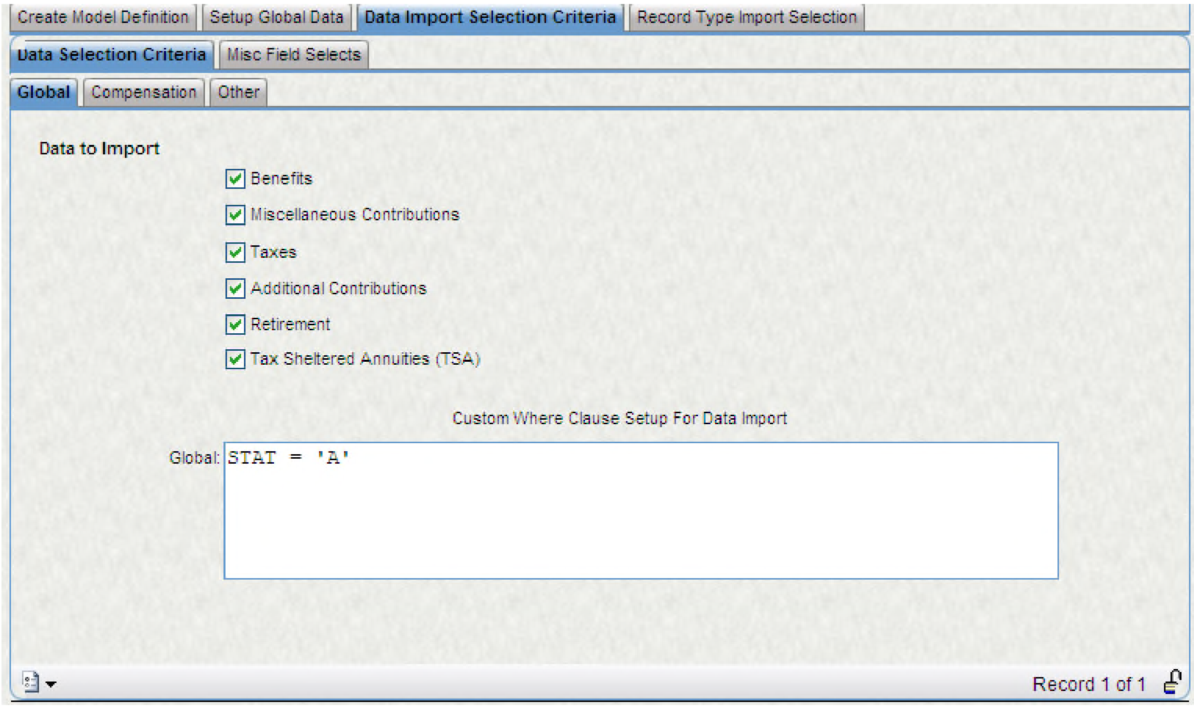
be entered in the Cluster and Attr fields. For example, if step increases are effective on an employee's hire date, which resides on the Employee Master, then the Cluster field would contain Employee Master and the Attribute field would contain HDT (the column name for hire date).

When the data is imported into the model, the year of the employee's hire date will be converted into a year that falls within the model's begin and end dates and will be written to one of the Sal Inc Date fields on PB pay assignment. If step increases are based on an entered date (hire date, anniversary date, etc.) plus a number of days (e.g. 30, 60, 90) then this number may be entered into the + Days field. If step

increases are based on a pre-defined date, such as the beginning of the fiscal year, then this date may be entered into one of the "Salary Inc Date" fields. This date is not modified, so it should fall within the dates of the model. The + Days field may also be used with the "Salary Inc Date" fields. The system will not allow a salary increment cluster/attribute and a salary increment date to be entered.

PBSTRQ - Data import selection criteria

Global Selection Criteria:



The Data import selection criteria screens enables very detailed, client specific, selection criteria to be entered, which will control what data is imported into each model. It can also be used to globally disable the importing of HR screens such as Benefits, Misc Contributions, Taxes, Additional Contributions, Retirement Contributions or Tax Sheltered Annuities.

Field Descriptions

Model ID: Enter the model ID.

BENEFITS: If the model is to include the cost of benefits, then enter a check mark in the BENEFITS field. If this field contains an blank, then no benefits from BENEINFO will be imported into the model.

MSC CONT: If the model is to include the cost of miscellaneous contributions, then enter a check mark in the Miscellaneous Contribution field. If this field contains an blank, then no contributions from the HR will be imported into the model.

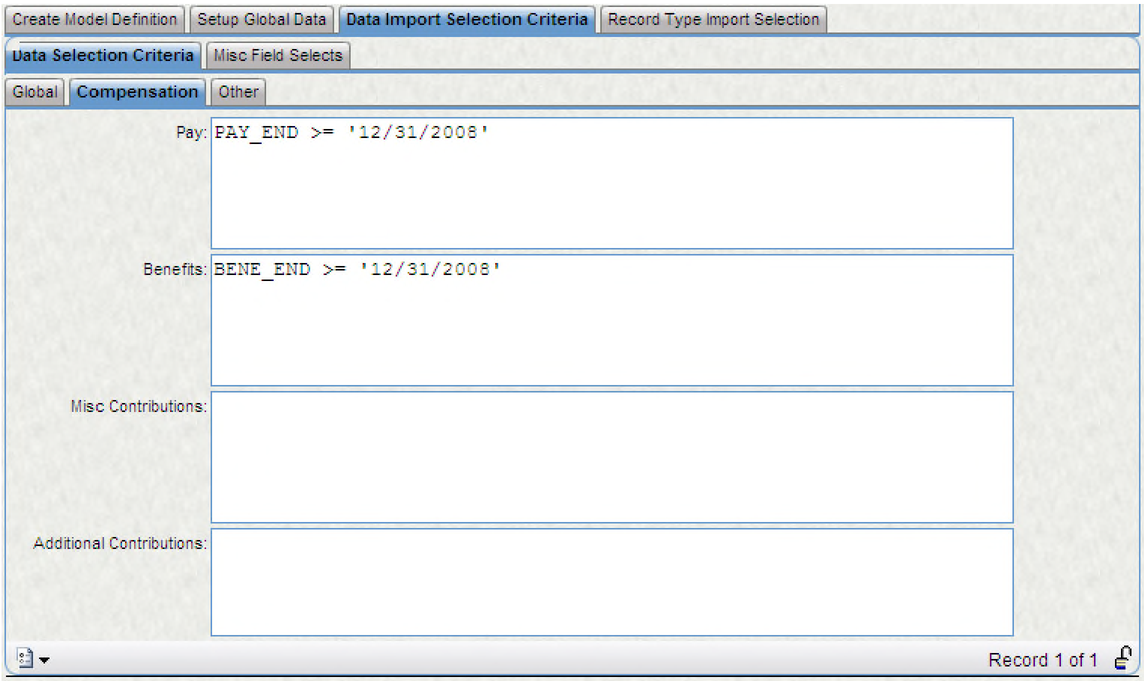
TAXES: If the model is to include the cost of tax contributions, then enter a check mark in the TAXES field. If this field contains an blank, then no contributions from MANDDED will be imported into the model.

ADDLCONT: If the model is to include the cost of additional contributions then enter a check mark in the Additional Contribution field. If this field contains an blank, then no contributions from Additional contributions will be imported into the model.

RETIRExx: If the model is to include the cost of retirement contributions, then enter a check mark in the RETIRExx field. If this field contains an blank, then no contributions from RETIRExx will be imported into the model. **Note:** Entering a check mark in these fields will cause all of the data from the appropriate screens to be imported into the model. If only certain data is to be imported, then the next eight fields may be used. The next eight fields control what data, either globally and/or by screen, is imported into PB.

GLOBAL: Enter the global selection criteria. The Global selection criteria entry creates a list of employee IDs that are allowed to have data imported into the model. Each of the other selection criteria fields (PAY, BENEFITS, MSC CONT, ADDLCONT, TAXES, and RETIRExx) may further limit the records that are imported for those employees, but they cannot cause data to be imported for employees that are not included in the global list. If the Global line is entered as shown below, (BARGUNIT = "CLER" OR BARGUNIT = "MGMT"), then only employee's whose bargaining unit, on the hr_empmstr table, equals "CLER" or "MGMT" will be imported.

Compensation:

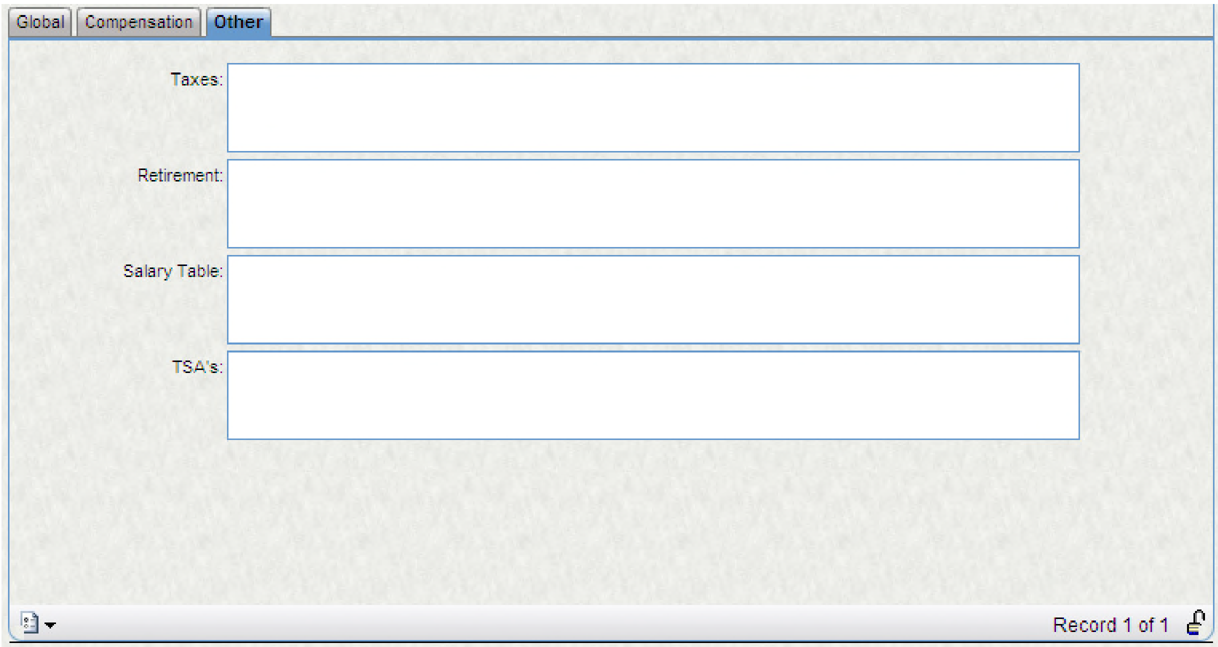


Pay: Enter any Employee pay assignment/Quickpay specific selection criteria. For clients with only payroll, this selection criteria applies to the pyp_pay_dtl table.

Benefits: Enter any Benefit specific selection criteria. For clients with only payroll, this selection criteria applies to the pyd_cdh_dtl table.

Misc Contributions: Enter any miscellaneous contributions specific selection criteria. Not used for payroll only clients.

Additional contributions: Enter any Additional contributions specific selection criteria. Not used for payroll only clients.



Taxes: Enter any Mandatory taxes specific selection criteria. Not used for payroll only clients.

RETIRExx: Enter any RETIRExx specific selection criteria. Not used for payroll only clients.

SLRYTBLE: Enter any SLRYTBLE specific selection criteria. Not used for payroll only clients.

PBSTRQ - Data import selection criteria – Misc Field Selects

The Data import selection criteria screen controls how misc fields and effective date fields on PB pay assignments and benefits are populated. These misc fields are used as custom selection criteria when running utilities. The effective date fields are used as new begin dates when running utilities. By default, the Misc Fields on PB pay assignments and Benefits are populated as follows:

PB Pay Assignments:

Misc 0 = Record Type from HR pay assignment

Misc 1 = Department from HR pay assignment

Misc 2 = Job code from HR PCN/Position Definition Table

Misc 3 = Division from HR pay assignment

Misc 4 = Pay class from HR pay assignment

Misc 5 = Calendar from HR pay assignment

Misc 6 = Record from from HR pay assignment

Misc 7 = Blank

Misc 8 = Blank

Misc 9 = Blank

PB Benefits

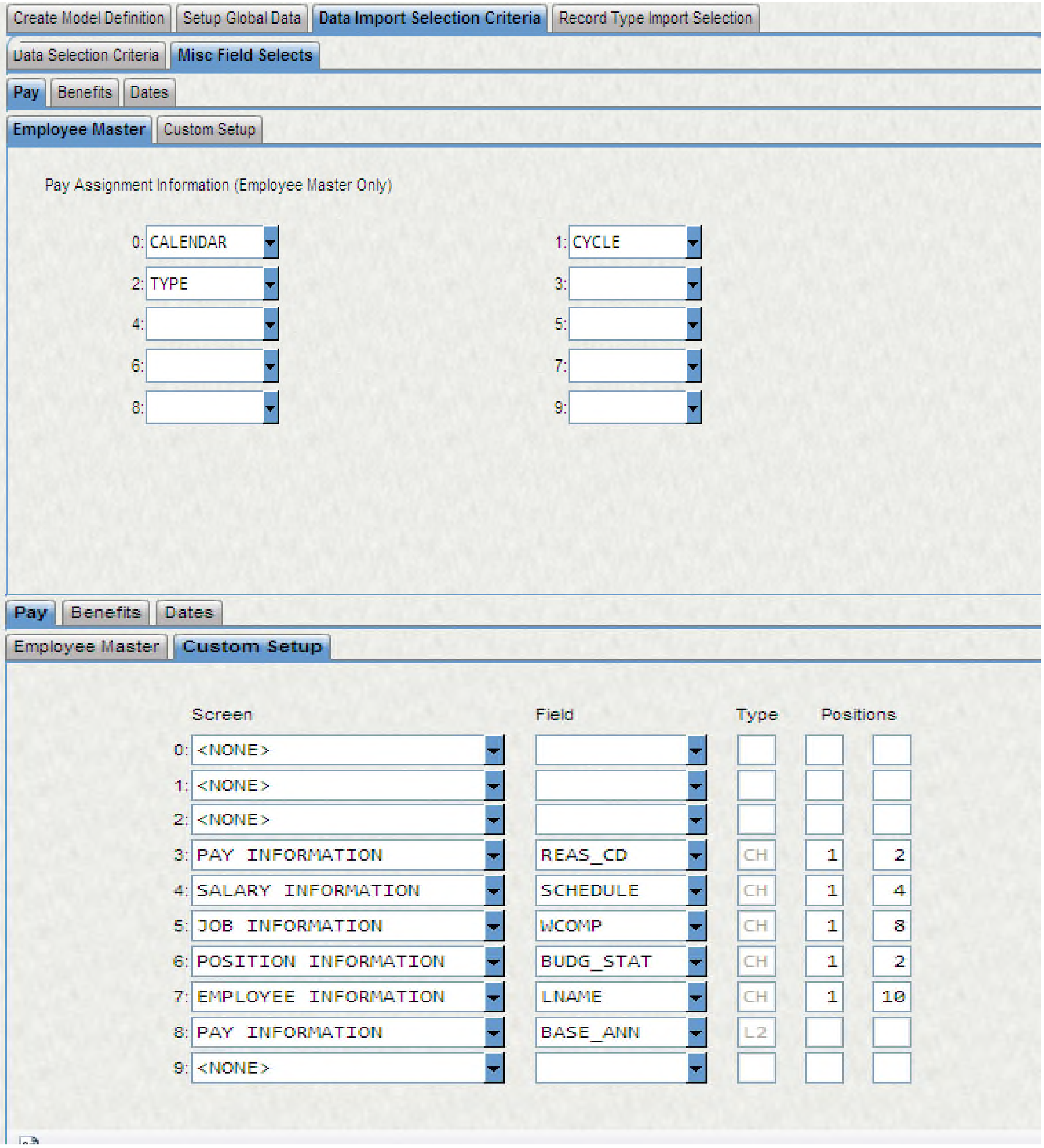
Misc 0 = Benefit Package from HR Benefit assignment

Misc 1 = The first misc code on HR Benefit assignment

Misc 2 = The second misc code on HR Benefit assignment

Misc 3 = The third misc code on HR Benefit assignment

Misc 4 = The calc option from HR Benefit assignment



These defaults may be overridden with the Pay/Benefit/Data screens. The employee master screen may be used to populate the misc fields with any field from HR Employee Master that is defined as a "character" type. Only character type fields will appear in the pick list. If this part of the screen is used then the value from the entered field will be imported into the chosen misc field. The custom tabs can also be used to override the misc field default entries. If the custom section is used for the pay assignments, the user may enter a cluster from the available list, (Employee Information, Pay Information, Salary Information, Position Information and Job Information) for the pay assignment misc fields. If the Benefit custom tab is selected the user may enter a cluster from the available list (Employee Information, Benefit information and Benefit assignments. After a cluster has been entered, any field from that cluster may then be chosen. After a field is chosen the user may enter a start and stop position for the field. (Note: the system will default a start position of 1 and a stop position of the entered fields maximum length with a limit of 10. The maximum stop position is 10 because the start position is 1 and the misc fields have a length of 10. Thus, for any given start position, the stop position can include a maximum of 10 positions). The stop position may also be less than the length of the entered field. For example, if the first two characters of the Employee Type field (a four character field) are to be imported, then the start position would be 1 and the stop position would be 2. If the last two characters of the Employee Type field are to be imported, then the start position would be 3 and the stop position would be 4. Only fields with a displayed Type of "CH" may have the start and stop positions modified. Changes to the start and stop position for any other displayed Type will be ignored. This is because only "CH" field types may be parsed with a start and stop position.

If an entry is made on the employee master and custom tabs for the same misc field, then the entry on the custom screen will be used. The Dates Tab control what dates are imported into the Date1 and Date2 fields on Pay assignments and benefits. Simply choose from the available list of dates. The field after the "+" is used to offset the entered dates by an amount of days.

Pay 1: Enter an attribute, from the supplied list, that will be imported into the Date 1 field on PB pay assignment. The year of the date stored in HR will be modified to fall within the date range of the model. Thus, if HDT (hire date) was entered and the hire date was 04/03/1989 and the model dates were 07/01/2001 - 06/30/2002, then the date written to the Date 1 field would be 04/31/2002. This date can then be used as selection criteria when running utilities.

Pay 2: Enter an attribute, from the supplied list, that will be imported into the Date 2 field on PB pay assignment. The year of the date stored in HR will be modified to fall within the date range of the model. Thus, if HDT (hire date) was entered and the hire date was 04/03/1989 and the model dates were 07/01/2001 - 06/30/2002, then the date written to the Date 2 field would be 04/31/2002. This date can then be used as selection criteria when running utilities.

Bene3: Enter an attribute, from the supplied list, that will be imported into the Date 3 field on PB Benefits. The year of the date stored in HR will be modified to fall within the date range of the model. Thus, if LONGEVITY (longevity date) was entered and the longevity date was 04/03/1989 and the model dates were 07/01/2001 - 06/30/2002, then the date written to the Date 3 field would be 04/31/2002.

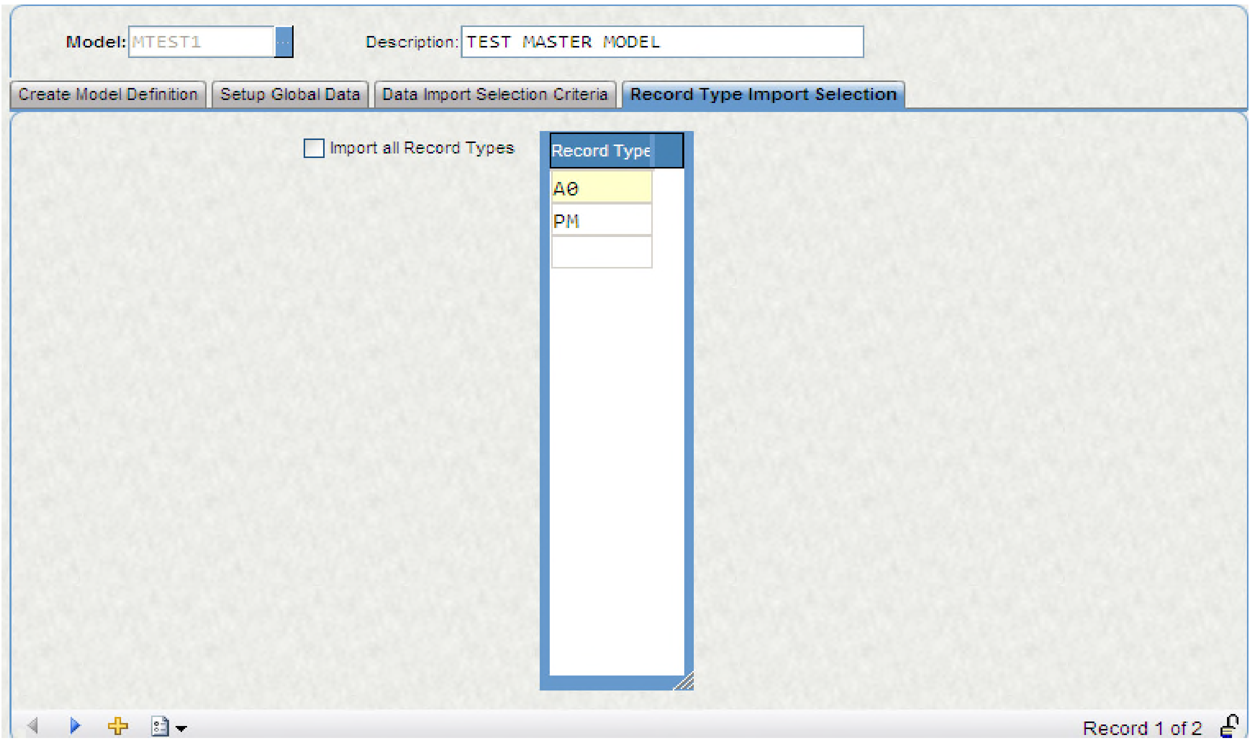
This date can then be used as selection criteria or as an effective date when running utilities.

Bene4: Enter an attribute, from the supplied list, that will be imported into the Date 4 field on PB Benefits. The year of the date stored in HR will be modified to fall within the date range of the model. Thus, if LONGEVITY (longevity date) was entered and the longevity date was 04/03/1989 and the model dates were 07/01/2001 - 06/30/2002, then the date written to the Date 4 field would be 04/31/2002.

This date can then be used as selection criteria or as an effective date when running utilities.

PBSTRQ - Record Type Import Selection

Record Type Import Selection Tab controls what pay assignment record types will be imported into each model.. If all pay assignment record types are to be imported into a model, then enter a "Y" in the "Import All Record Types" field. Note: you do not have to press ENTER after entering a "Y" (check mark), the system will automatically select all existing record types from the pay assignment table (usually hr_emppay or hr_payassgn depending on HR versions) and enter them into the screen. To view the record types, press the F3 key, choose “Select New” and press ENTER. Enter the model id in the Model ID field then press ENTER. If only selected record types are to be imported, then they may be entered manually.



Field Descriptions

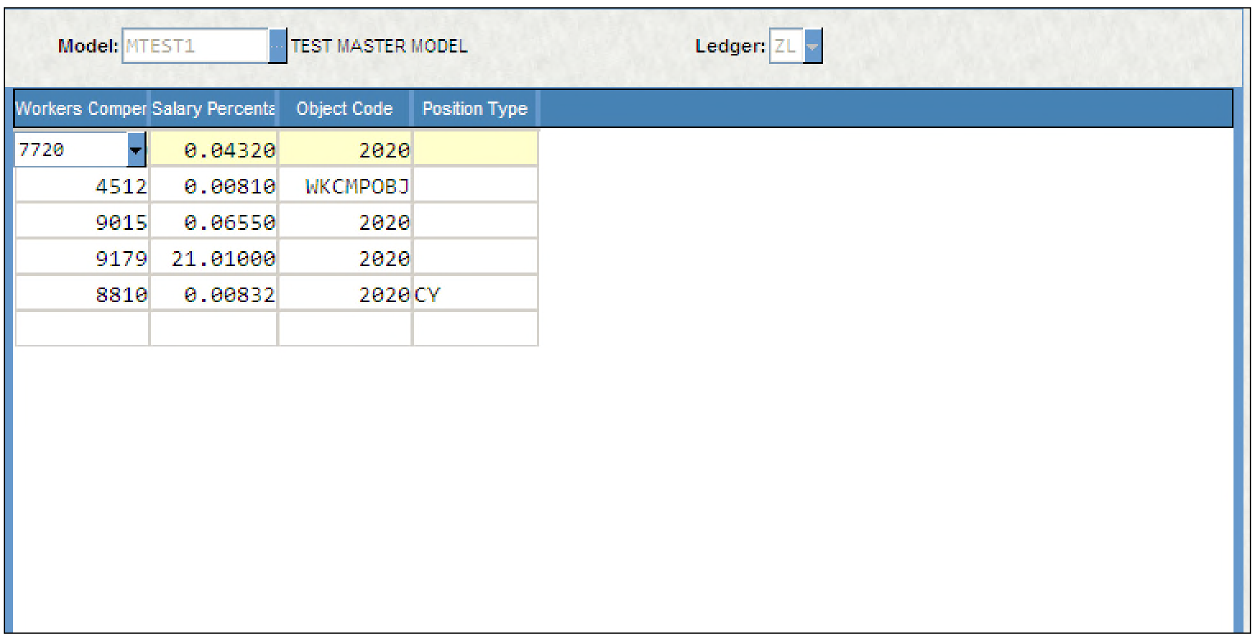
Model ID: Enter the model ID.

Import All Record Types?: If all assigned record types on Employee pay assignments/Quickpay are to be imported into the model, then enter a "Y" in this field (you do not have to press ENTER).

Record Types: Enter/view/remove the pay assignment record types that will be imported into the model.

PBSTWK - Worker's Compensation set up

The PB Worker’s Compensation screen contains worker's compensation object codes, salary percentages, and work comp codes. When the import program populates the model with data, common codes PYWC will be read to determine how to populate the PB Worker’s comp fields. Note: Depending upon the PYWC set up, some of the PB Worker’s Comp fields may not be populated after the import. See the PYWC common code description below. If the object code is not identified in the common code, then it will be set to WKCMPOBJ as a default. If the object code for any of the work comp codes is left at WKCMPOBJ, then any pay assignment with that work comp code will not have anything calculated for work comp. The user will need to enter the appropriate object codes if worker's comp is to be calculated and budgeted for by PB. (Note: worker's compensation amounts are calculated by matching the value in the Work Comp field from PB employee pay assignment screen with the appropriate code from the PB Worker’s Comp screen to determine the work comp salary percentage. This percentage is then applied to the annual amount calculated for the pay assignment. If the salary percentage is supposed to be 5%, then the value on PB record type needs to be 5.00000, not 0.05000. If 0.05000 is in the common code, then it will need to be changed on PB worker’s comp to equal 5.00000.


Model: MTEST1 TEST MASTER MODEL Ledger: ZL

Workers Compen	Salary Percenta	Object Code	Position Type
7720	0.04320	2020	
4512	0.00810	WKCMPOBJ	
9015	0.06550	2020	
9179	21.01000	2020	
8810	0.00832	2020	CY

Field Descriptions

Model ID: Enter the model ID.

Ledger: Enter the ledger code. This must be the ledger code from PCMODEL for the entered model ID.

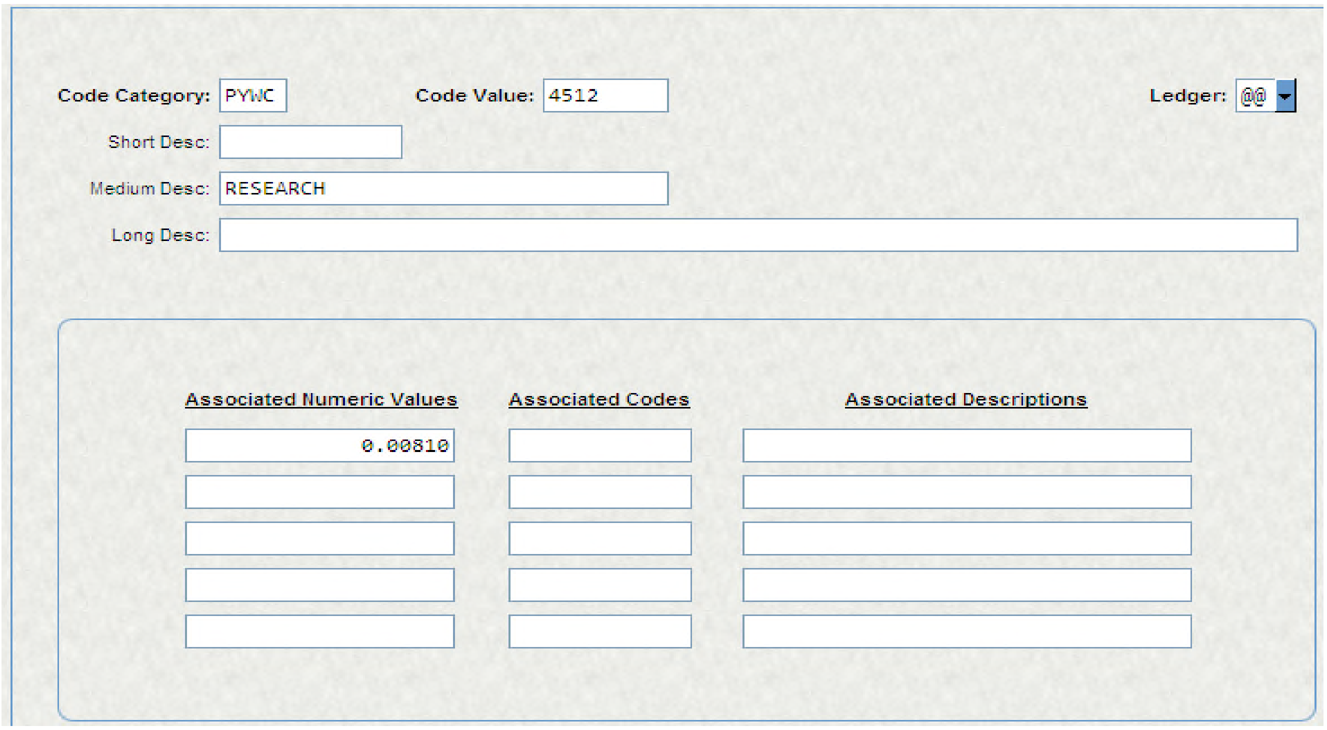
Work Comp Code: The worker's comp code should populate from common codes. If any codes are not in common codes, then they will need to be hand entered.

Salary Percentage: The salary percentage should populate from common codes. If this field is blank, then it will need to be hand entered. The percent must be entered as a whole number (e.g. 5 percent would be entered as 5.00000, not 0.05000). If the value from common codes has already been divided by 100 (e.g. 0.05000), then it will need to be changed on the PB Work Comp screen.

Obj Code: The object code should populate from common codes. If the object code is not specified in the common code, then the import program will insert a default entry of WKCMPOBJ. For any records with a value of WKCMPOBJ, enter the appropriate object code for the displayed worker's comp code. This object code will be used as the expense object code for the displayed worker's comp code when calculating the model. If any object codes containing WKCMPOBJ are changed, then worker's comp will not be calculated for those work comp codes.

Position Type: If different posting strategies are to be used based on position type for the same Work Comp Code, then this field must contain the appropriate position type (must be CL, CE, or CY). If the posting does not vary based on position type, then this field may be left blank.

Example of a worker's comp common code


Code Category: PYWC Code Value: 4512 Ledger: @@

Short Desc:

Medium Desc: RESEARCH

Long Desc:

Associated Numeric Values	Associated Codes	Associated Descriptions
0.00810		

Field Descriptions

Code Category: Must be PYWC.

Code Value: Enter the worker's compensation code.

Ledger: Enter the corresponding MODEL ledger code if work comp codes are stored at the Ledger, otherwise enter @@.

Short/Medium/Long Descriptions: Enter any desired helpful text.

Numeric Values 1: Enter the worker's compensation salary percentage. This must be entered as a whole number. E.g. 5.25% must be entered as 5.25, not .0525.

Numeric Values 2: If the displayed worker's compensation code is posted differently based on position type, then enter the rate for the second position type. This will usually be the same value as is in Numeric Values 1. If the displayed worker's compensation code is not posted differently based on position type, then leave this field blank.

Numeric Values 3-5: Not used.

Codes 1: Enter the worker's compensation object code.

Codes 2: If the displayed worker's compensation code is posted differently based on position type, then enter the object code rate for the second position type. If the displayed worker's compensation code is not posted differently based on position type, then leave this field blank.

Codes 3-5: Not used.

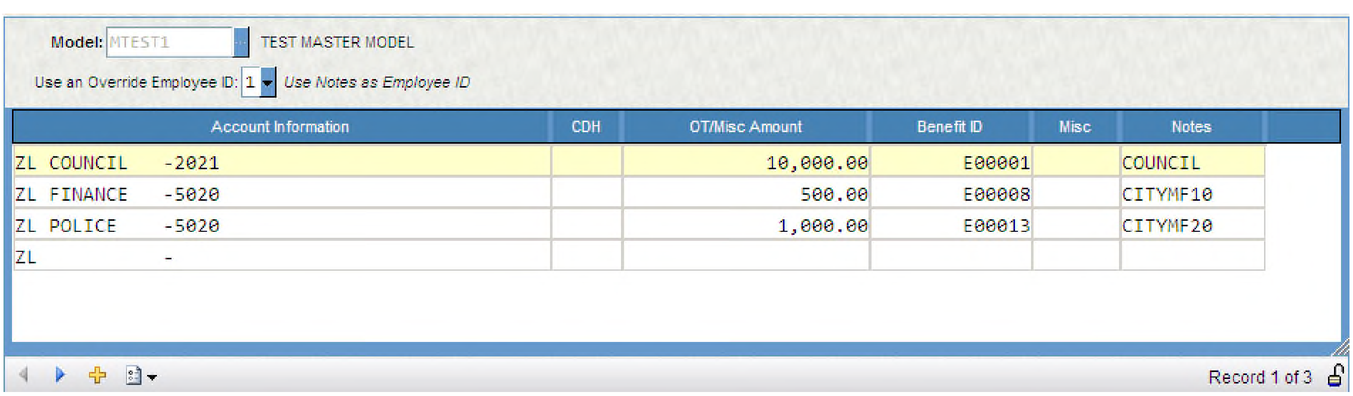
Descriptions 1: If the displayed worker's compensation code is posted differently based on position type, then enter the appropriate 2-character position type (e.g. CL, CE, CY). If the displayed worker's compensation code is not posted differently based on position type, then this field may be left blank.

Descriptions 2: If the displayed worker's compensation code is posted differently based on position type, then enter the appropriate 2-character position type (e.g. CL, CE, CY). If the displayed worker's compensation code is not posted differently based on position type, then leave this field blank.

Descriptions 3-5: Not used.

PBSTMA - Enter overtime/miscellaneous amounts

The PB Overtime screen is used to budget for overtime and any other miscellaneous costs, if desired. The amounts entered on this screen are expected to be annual amounts and are not modified by any calculations. When the records are calculated, the calculation results will be written with an employee ID of LUMPSUM. Note, if the Notes field is entered, then the employee ID of LUMPSUM will be replaced with the value in the Notes field. If a Benefit ID is entered, to have benefits calculated, the calculation results will be written with an employee ID of the entered benefit ID. Note, the overtime records are always calculated when a model is calculated. Thus, if new overtime records are added or existing overtime records are modified, the PB pay assignment Calc Flags do not have to be set to Y to calculate the overtime records. The PB calculation Misc0 field is populated with PCOVRTIM. Thus, If just the PCOVRTIM calculation results are to be viewed using the PB reports, then a selection criteria of, misc0 = “PCOVRTIM”, will only display the overtime calculation results.


Model: MTEST1 TEST MASTER MODEL

Use an Override Employee ID: 1 *Use Notes as Employee ID*

Account Information	CDH	OT/Misc Amount	Benefit ID	Misc	Notes
ZL COUNCIL -2021		10,000.00	E00001		COUNCIL
ZL FINANCE -5020		500.00	E00008		CITYMF10
ZL POLICE -5020		1,000.00	E00013		CITYMF20
ZL -					

Record 1 of 3

Field Descriptions

Model ID: Enter the model ID.

Ledger: Enter the ledger code. This is the ledger code from the PB MODEL screen.

Org Key: Enter an org key that is to have a budgeted amount.

Obj Code: Enter an object code, if a specific one is to be used.

CDH#: If the object code from the CDH definition screen in payroll is to be used, then enter the CDH number. The CDH# is used to determine the object code that the overtime or miscellaneous amounts will be expensed to. If an object code and a CDH# are entered, the CDH# will be ignored. If neither an object code nor a CDH# are entered, then the default object code from the PB SETUP screen will be used. If all overtime or miscellaneous amounts are to be expensed to the same object code, then it is not necessary to enter any object codes or CDH#'s because the default from PB SETUP will be used.

OT/Misc Amt: Enter the overtime or miscellaneous amount. Remember that this is an annual amount.

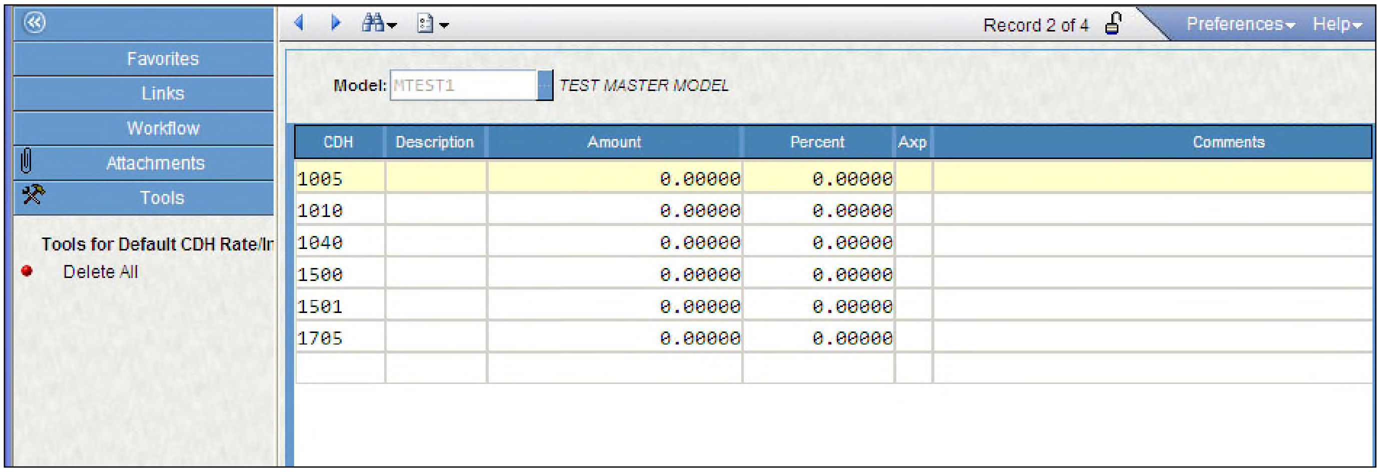
Benefit ID: If benefits are to be calculated on the amounts entered in PB Overtime screen, then enter an employee ID in the Benefit ID field. All of the benefits, on PB Benefit assignments, for the entered employee ID will be calculated with the PB overtime amount.

Misc: The PCOVRTIM Misc field is equivalent to the HR employee pay assignment Dist window Misc field. The entered value will be written to the PB calculation DstMsc field and can be used in reports.

Notes: Enter any desired notes. If any notes are entered, then the default ID of LUMPSUM, written to the PB calculation storage table, will be replaced with the entered notes.

PBSTCD - Set up amounts for CDHs calculated in PY

The Default CDH/Rate Information screen is used to set up a default amount for any CDH that is in PB benefits with a 0 entry in the Amount and Percent fields. These types of benefits usually are calculated in payroll (e.g. an amount of 0 is entered in HR). Note: the PB system is a budget estimation tool. Some contributions entered in HR are modified by calculation codes in payroll. PB does not recognize these calculations. If, for example, a contribution is entered in HR as 5%, but the 5% is actually calculated on a special pay base in payroll (e.g. child support), PB does not recognize this. The 5% will be budgeted on the employee's calculated annual salary.) If any records in PB benefits, after importing, have an amount and percent of 0, then those CDHs will be inserted into the this screen by the import file. The user may then enter amounts/percents and an expressed as value to budget a default amount for those contributions. Percents are entered as whole numbers (e.g. 5.25% would be entered as 5.25, not 0.0525). Percents are based on the employee's calculated annual salary. Comments may be entered for each entry. On most screens within PB, the existing data for that screen is deleted each time the model is imported. This does not happen with this screen. If the user wishes to delete all entries from the screen then use the 'Delete All' tool.



Field Descriptions

Model ID: Enter the model ID.

CDH: The import file will populate the CDH field. Any CDH listed on the this screen has at least one occurrence on PB benefit assignment, for the displayed model ID, with an entry of 0 in the Amount and Percent fields.

Desc: This field will display the short description from the CDH definition screen in payroll.

Amount: Enter a flat dollar amount for the CDH.

Percent: Enter a percent for the CDH (Note: Enter a flat dollar amount OR a percent amount. If both are entered, then the Amount entry will be used).

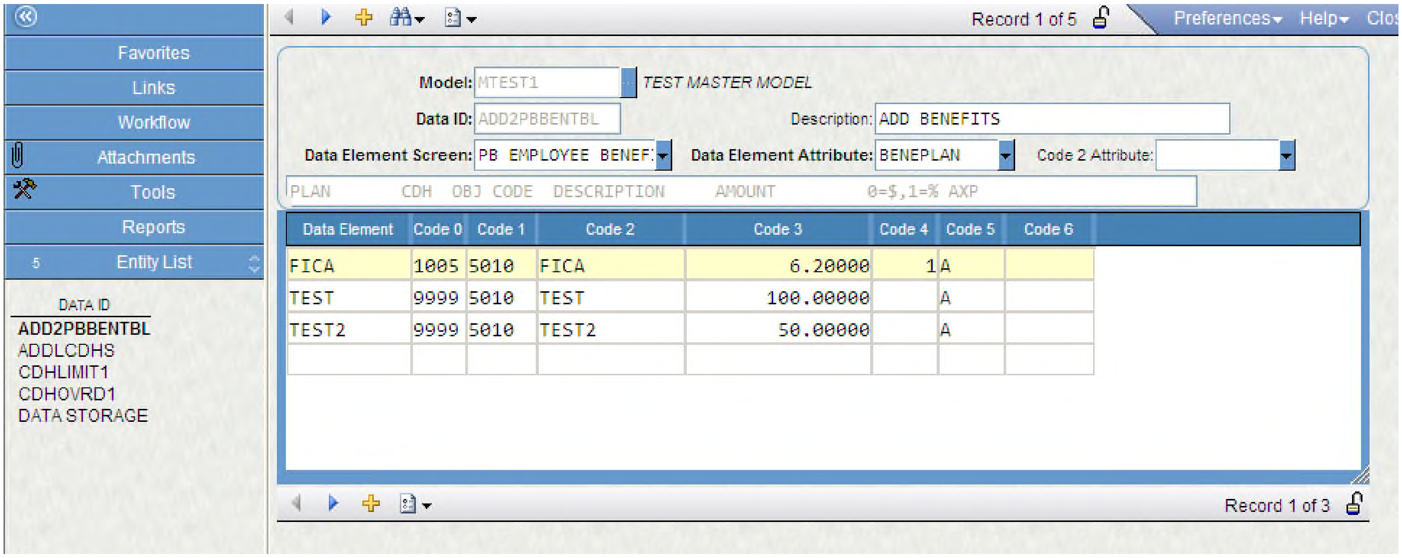
AXP: Enter the AXP (amount expressed as). If the Percent field has been entered, this value is then assumed to be an "A".

Comments: Enter any desired comments.

Delete All: Entries can be deleted with the Delete All tool

PBSTIS - Import support set up

The PB Import Support screen is used to activate several pre-defined special processing functions within the PB system. Clients may also pay for client-specific options to be created for this screen to perform client-specific functions. The pre-defined functions are defined below.



Field Descriptions

Model ID: Enter the Model ID.

Data ID: Enter the Data ID (run option) for the entries. Several pre-defined options exist (listed below).

Data ID Description: Enter a description for the entered Data ID. Note: if multiple screens are entered for the same Data ID, then the description must be exactly the same for each screen. Otherwise, the entries will not sort correctly. Once a full screen of entries has been made and a second screen is being entered in Add mode, for the same Model ID/Data ID, a code of COPY may be entered into the Data ID Description field. When the cursor leaves the field the previously entered description will populate the field.

Data Elem. Screen: The Data Elem. Screen is used to indicate the screen that shall be used as the selection criteria screen. The available options are California Retirement Information, Employee Information, PB Employee Benefits, PB employee Information and PY Employee Information.

Data Elem. Attribute: The Data Elem. Attribute field is used in conjunction with the Data Elem. Screen field to indicate the screen and attribute that will be used as the selection criteria for the entries on in this screen for each Data ID. The field is validated to only accept fields that exist on the entered Data Elem. Screen.

Data ID Help Line: This field is used to assist the user in entering the appropriate data into each field. For pre-defined options, the Data ID Help Line will automatically be populated when the cursor leaves the Data ID field. This field has the same copy feature that was described for the Data ID Description field.

Data Elem.: The Data Elem. field stores the actual selection criteria value that will be used to indicate which entry applies to an employee for each Model ID/Data ID combination.

Example:

Data Elem. Screen: **Employee Information**

Data Elem. Attribute: BARGUNIT

Data Elem.: MGMT

The above entry would apply to any employee with a bargaining unit of "MGMT" on the Employee Master screen.

Example:

Data Elem. Screen: PB Employee Benefits

Data Elem. Attribute: MISC1

Data Elem.: EO

The above entry would apply to any employee with a Misc 1 value of "EO" on the PB Benefits screen (the PB screen that stores all employee benefits).

Code 0 - 6: The Code fields (0 - 6) have specific meaning based on which option is entered in the Data ID field. See the Data ID Help Line for a description of what should be entered in each misc field. Some options do not use all of the misc fields.

Pre-Defined PBIMPSPT options:

CDHOVRD1 - 10

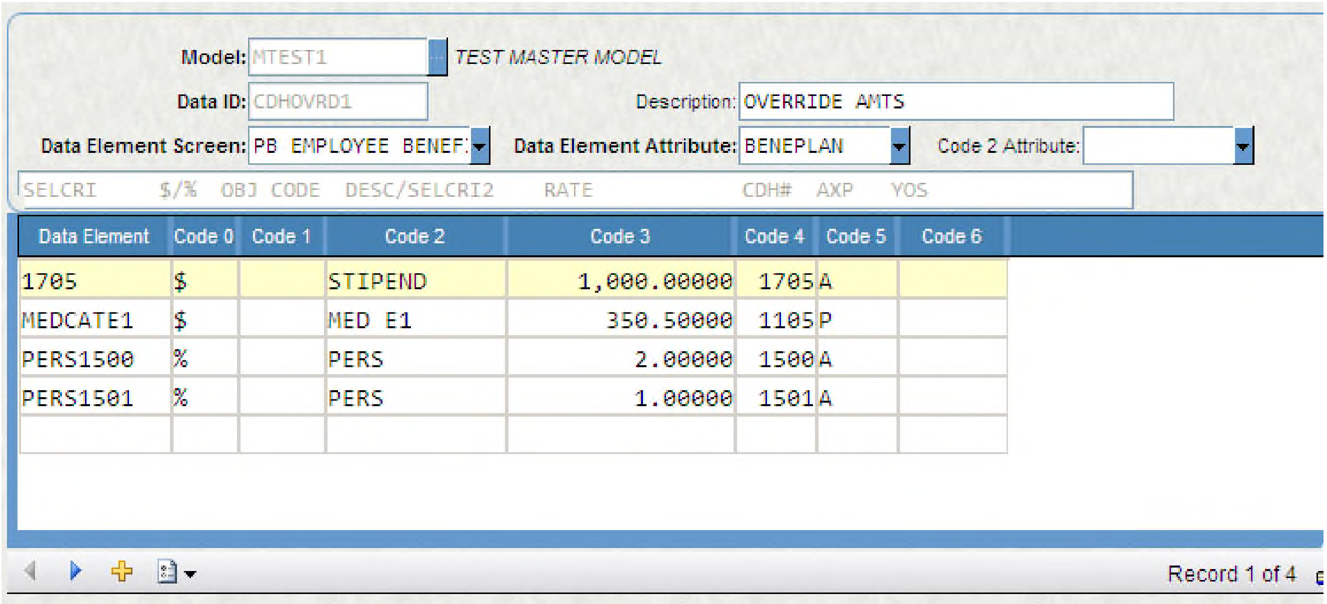
The CDHOVRD1 to CDHOVRD10 options are used to perform overrides to existing CDH information in HR. The available pieces of information that may be overridden include:

Whether the rate is a percent or flat dollar amount

The object code

The rate (percent or flat dollar)

AXP



Model: MTEST1 TEST MASTER MODEL

Data ID: CDHOVRD1 Description: OVERRIDE AMTS

Data Element Screen: PB EMPLOYEE BENEF: Data Element Attribute: BENEPLAN Code 2 Attribute:

SELCRI $/% OBJ CODE DESC/SELCRI2 RATE CDH# AXP YOS

Data Element	Code 0	Code 1	Code 2	Code 3	Code 4	Code 5	Code 6
1705	$		STIPEND	1,000.00000	1705	A	
MEDCATE1	$		MED E1	350.50000	1105	P	
PERS1500	%		PERS	2.00000	1500	A	
PERS1501	%		PERS	1.00000	1501	A	

Record 1 of 4

Field Descriptions

Data Elem.: Enter the selection criteria value that is appropriate for the entered Data Elem. Screen and Data Elem. Attribute.

Code 0: If the CDH's rate is to be overridden, then enter a $ (flat dollar) or % (percent) in this field. If this field is blank, and the Code 3 field contains a value, then a default of $ will be assumed for the Code 0 field.

Code 1: If the object code for the CDH that is set up in payroll is be overridden, then enter the new object code in this field.

Code 2: If the CDH is a percent CDH and is to always calculate using base salary (as opposed to using the inflated salary calculated when the ADDLCDHS Data ID option is entered, see below for a complete description of the ADDLCDHS option), then enter "BASESLRY" anywhere in the field. This will cause the "Use Base Sal" field on PCBENCOD to be set to "Y" for the CDH for the selected employee's. This field can also be used to store descriptive text about the CDH entered in Code 4. **Note:** the field may contain descriptive text AND the BASESLRY code simultaneously.

Code 3: If the CDH's rate is to be overridden, then enter the new rate in this field. Note: whether the rate is entered in the Percent or Amount field, on PCBENCOD, is determined by what is entered in the Code 0 field.

Code 4: Enter the CDH that the line of values (Data Elem., Code 0 - Code3, and Code 5) applies to.

Code 5: If the AXP (amount expressed as) is to be overridden, then enter the new AXP in this field.

Code 6: This field is used as a selcri field for years of service (stored on PCEMPTBL). Valid codes are O-Original Hire, H-Hire, V-Leave, S-Sepr, D-Dist Sen, P-PosPcn, and L-Long. Valid operators are =, <, >, > <.

Examples:

To add the selection criteria of "Hire years =5", enter H=5.

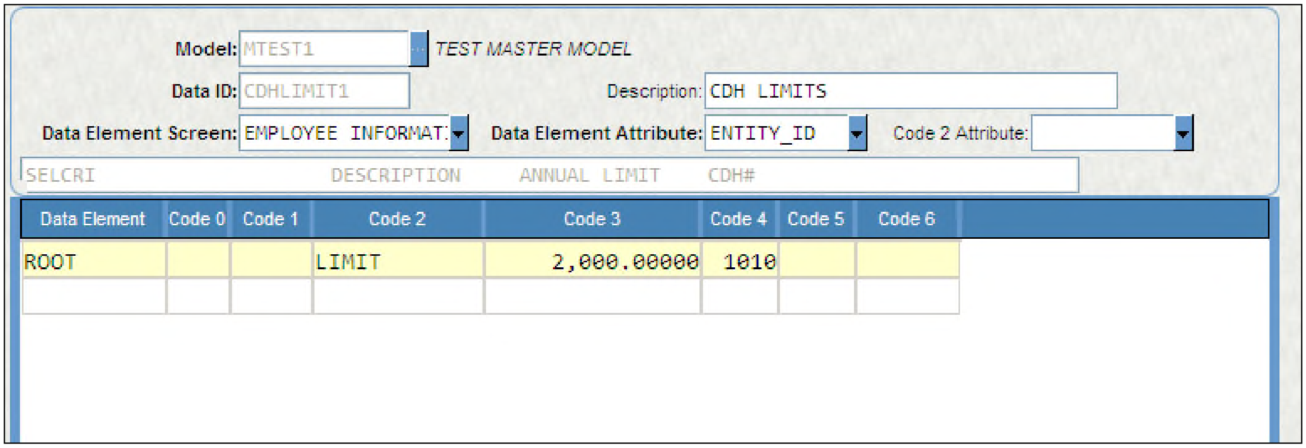
To add the selection criteria of "Leave years <10", enter V<10.

To add the selection criteria of "Longevity years >5 and Longevity years <10", Enter L>5<10.

To add the selection criteria of "Orig Hire years >5", enter O>5.

CDHLIMIT1

The CCDHLIMIT1 option is used to assign limit amounts to CDH's. If, when the CDH is calculated, the amount exceeds the limit, then the calculated amount will be set to the limit amount.



Field Descriptions

Data Elem.: Enter the selection criteria value that is appropriate for the entered Data Elem. Screen and Data Elem. Attribute.

Code 0: Not used.

Code 1: Not used.

Code 2: This field can be used to store descriptive text about the CDH entered in Code 4.

Code 3: Enter the annual limit. Note: the limit amount must be entered as an annual flat dollar limit.

Code 4: Enter the CDH that the line of values (Data Elem., Code 0 - 3, and Code 5 - 6) applies to.

Code 5: Not used.

Code 6: Not used.

ADDLCDHS

This option allows for the employee's calculated salary to be inflated for the purpose of calculating percent benefits (CDHs). The CDHs that are entered, using the ADDLCDHS code, will have their amounts added to the calculated salary for each of the employee's pay assignments, for the purpose of calculating percent CDHs assigned to the employee. The CDHs added to the pay assignments can be flat dollar or percent CDHs. If a percent CDH is not to be calculated on the inflated salary amount (e.g. it is to be calculated on the regular calculated annual salary), then either set the PCBENCOD Slry field to Y or set any of the PCBENCOD Misc fields to BASESLRY. This can be done by hand or with the PBUPDATE screen.

Note: If a percent CDH is listed under the ADDLCDHS Data ID, then the amount calculated for that CDH will NOT be added to the employee's salary when calculating the actual benefit amount to be budgeted for that same CDH. See example below.

Example of the above statement:

An employee has 4 CDHs and a base salary of $100,000.

CDH A is a 2% CDH

CDH B is a 4% CDH

CDH C is a 5% CDH

CDH D is a 10% CDH

CDHs C and D are also set up on PBIMPSPT as ADDL CDHs.

Calculation for CDH A:

Base salary:100,000

Amount to add to base salary from ADDL CDH C:5,000

Amount to add to base salary from ADDL CDH D:10,000

Total salary to calculate CDH A:115,000

CDH A = 115,000 * .02 = $2,300

Calculation for CDH B:

Base salary:100,000

Amount to add to base salary from ADDL CDH C:5,000

Amount to add to base salary from ADDL CDH D:10,000

Total salary to calculate CDH A:115,000

CDH B = 115,000 * .04 = $4,600

Calculation for CDH C (which is also listed under the ADDLCDHS Data ID):

Base salary:100,000

Amount to add to base salary from ADDL CDH D: 10,000

Total salary to calculate CDH C: 110,000

Note: The amount to add to base salary from ADDL CDH C (CDH C) is not added to base salary when calculating CDH C (to prevent over paying of the CDH), but the amount from ADDL CDH D is still added to the base salary when calculating CDH C.

CDH C = 110,000 * .05 = $5,500

Calculation for CDH D (which is also listed under the ADDLCDHS Data ID):

Base salary: 100,000

Amount to add to base salary from ADDL CDH C: 5,000

Total salary to calculate CDH D: 105,000

Note: The amount to add to base salary from ADDL CDH D (CDH D) is not added to salary when calculating CDH D (to prevent over paying of the CDH), but the amount from ADDL CDH C is still added to the base salary when calculating CDH D.

CDH D = 105,000 * .10 = $10,500

Overall example of ADDLCDHS:

An employee has 4 CDHs and a base salary of $100,000.

CDH A is a $1000 annual flat dollar CDH

CDH B is a $2000 annual flat dollar CDH

CDH C is a 5% CDH

CDH D is a 10% CDH

Amount to add to base salary from ADDL CDH A:1,000

Amount to add to base salary from ADDL CDH B: 2,000

Amount to add to base salary from ADDL CDH C: 5,000

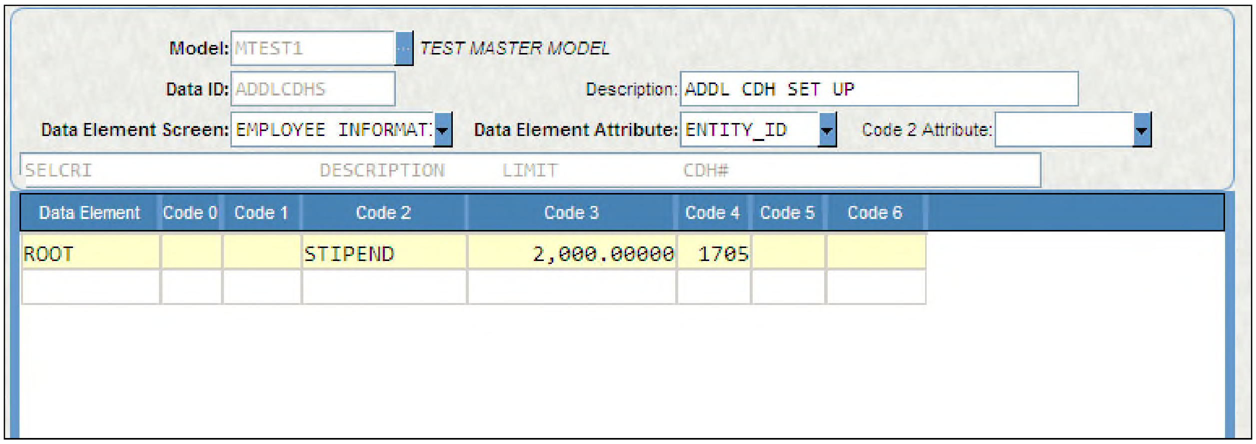
Amount to add to base salary from ADDL CDH D: 10,000

Total salary to calculate all percent CDHs (other than C and D): $118,000

Total salary to calculate CDH C: $113,000

Total salary to calculate CDH D: $108,000

Note: If a percent CDH is not to be calculated on the inflated salary generated by the ADDLCDHS set up, then set the "Use Base Sal" field to "Y" on PCBENCOD for the CDH. This can be done using the CDHOVRDx (x being 1 to 10) PBSETUP code (explained previously), or by using the PBUPDATE screen (explained later), or by hand entry.



Field Descriptions

Data Elem.: Enter the selection criteria value that is appropriate for the entered Data Elem. Screen and Data Elem. Attribute.

Code 0: Not used.

Code 1: Not used.

Code 2: This field can be used to store descriptive text about the CDH entered in Code 4.

Code 3: If a limit is to be placed on the amount added to the employee's salary for a CDH, then enter the limit. Note: the limit amount must be entered as an annual flat dollar limit.

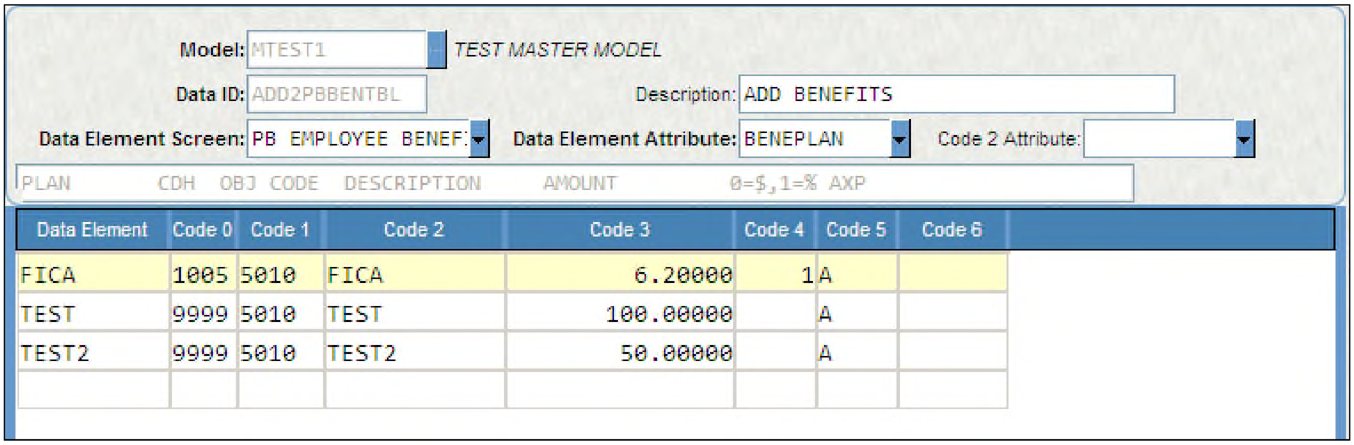
Code 4: Enter the CDH that the line of values (Data Elem., Code 0 - Code3, and Code 5) applies to.

Code 5: Not used.

Code 6: Not used.

ADD2PBBENTBL

The ADD2PBBENTBL option will insert into PB Benefit tables CDHs that normally would not be entered into that screen. Examples include FICA, Medicare, SUI, and SDI. Since these CDHs come from the Mandatory Tax screen (which does not validate to the benefit tables), they are not included when populating the PB Benefit tables (which is populated from the HR benefit table). Also, any new CDHs that do not exist in HR, but the user wants to assign them on the PB Benefit tables , either by hand or by the benefits utility, should be entered using the ADD2PBBENTBL code. All entries listed under this code will be inserted into the PB Benefit table for validation to, and assignment on, PB benefit assignments.



Model: MTEST1 TEST MASTER MODEL
Data ID: ADD2PBBENTBL Description: ADD BENEFITS
Data Element Screen: PB EMPLOYEE BENEF: Data Element Attribute: BENEPLAN Code 2 Attribute:
PLAN CDH OBJ CODE DESCRIPTION AMOUNT 0=$,1=% AXP

Data Element	Code 0	Code 1	Code 2	Code 3	Code 4	Code 5	Code 6
FICA	1005	5010	FICA	6.20000	1	A	
TEST	9999	5010	TEST	100.00000		A	
TEST2	9999	5010	TEST2	50.00000		A	

Field Descriptions

Data Elem.: Enter the benefit plan code. This can be a maximum of 8 characters.

Code 0: Enter the CDH associated with the benefit plan.

Code 1: Enter the object code associated with the benefit plan.

Code 2: This field can be used to store descriptive text about the benefit plan.

Code 3: Enter the rate for the benefit plan.

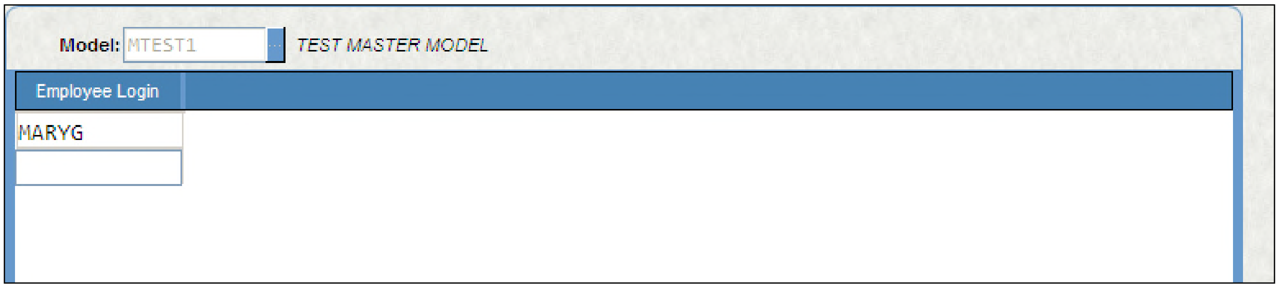
Code 4: Enter a 0 if the rate, in Code 3, is a flat dollar rate, or enter a 1 if the rate is a percent.

Code 5: Enter the AXP (amount expressed as) for the benefit plan. This field can be left blank for percent benefits.

Code 6: Not used.

PBSTML - Model Lock Set-up

The PB Model Lock screen is used to limit the ability to update a model to a specific set of users or to prevent anyone from updating the model's data. If the Create Budget Adjustment utility is to be used, then the model must be locked after a budget batch has been created and distributed to the GL. If the model is not locked, then inaccurate results may occur.



Model ID: This field stores the Model ID.

Employee Login: If the model is to have restricted access, then enter the employee login names that may update the model. If a model ID is entered without any employee login names, then the model will be locked to all users. Note: To fully implement the locking feature, security should be used to limit access to the PB Model Lock screen itself.

Import data into a PB model

PBMDHR - Import Data into Model from HR

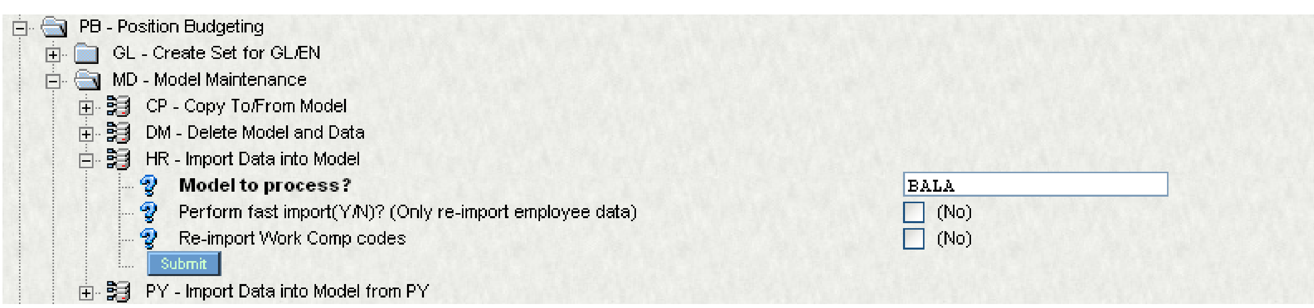
The second step in the PB process is to import data into the model (mask PBMDHR). Typically, most of the data is imported from HR,

while some object codes are imported from Payroll. Upon entering the mask PBMDHR, the following prompt will be displayed:

Enter the Model ID to process?

Type the name of the desired model and press Enter. If a model ID is entered that does not exist on the MODEL screen, then the following

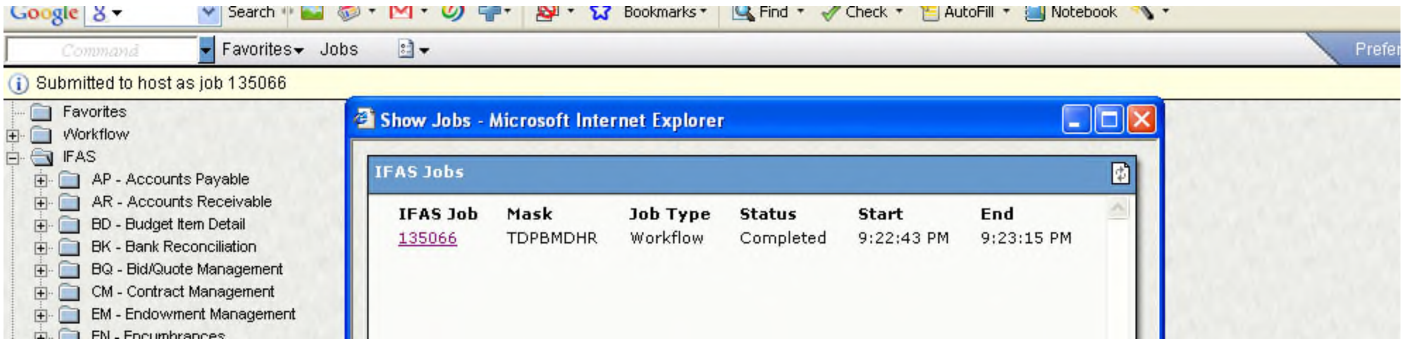
message will appear:



If you select yes to perform a fast import you will only be re-importing employee data. The tables will not be re-imported

If you select yesto re-import Work Comp Codes than the work comp codes that were previously imported into your model will be deleted and replaced.

Job Completion status: You can view the status of the job in the Show Jobs options



Tail Sheet of the Execution: PBMDHR (Imported no of employees)

IFAS Job Number: 135066

IFAS User: BALA

Output

```
Starting Tailsheet, 2/2/2009 9:22:43 PM
Starting PBFromHR version:7.9.3.267 2/2/2009 9:23:18 PM
                          Mask : TDPBMDHR
                      GLLedger : GL
                      JLLedger : PR
------------------------------ * ------------------------------
                          MD01 : BALA
          Perform fast import? : NO
    Re-import Work Comp codes? : NO
                     JobNumber : 135066
Preparing Select Statement
Processing PBIMPSPT records
Running 'PRECDHOVRD' PBUPDATE SQLs
Number of SQL statements executed: 0
Checking For CDH Overrides
Import data into BALA
Employees to import: 80
Deleting Old Entries for Model: BALA
Deleting Positions
Deleting PCN's
Deleting Jobs
Deleting Locations
Deleting Departments
Deleting Salary Tables
Deleting Pay Assignments
Deleting Benefit Table
Deleting Employee Benefits
Deleting Bargaining Units
Deleting calculation results
Deleting Pbcdhamt Table
Deleting Pbcdhamt Master Table
..Delete Complete for Model: BALA
Recording PB Data for Model: BALA
```

Review imported data:

The next step in the PB process is to view the data that was imported.

PBUPEM – Employee Information, Pay Assignment Information, Benefit Information.

PBTBSL Salary Table Information

PBTBPS - Position Information, Job Code Information, PCN Information.

PBTBLC -Location Code Information / Department Code Information/ Bargaining Unit Information

PBTBBE- Benefit Plan Information

PBSTCD - CDH Key/Obj Vectoring

PBUPVP- Vacant Position Information

PBSTML - Model Lock Set-up

PBUPSS - Select Statement Storage

PBTBPU- SQL Update Storage

PBUPCA- CDH Calculated Amounts

These screens contain the data that was imported into the PB system and a few that will need to be hand entered.

PBUPEM – Employee Information, Pay Assignment Information, Benefit Information.

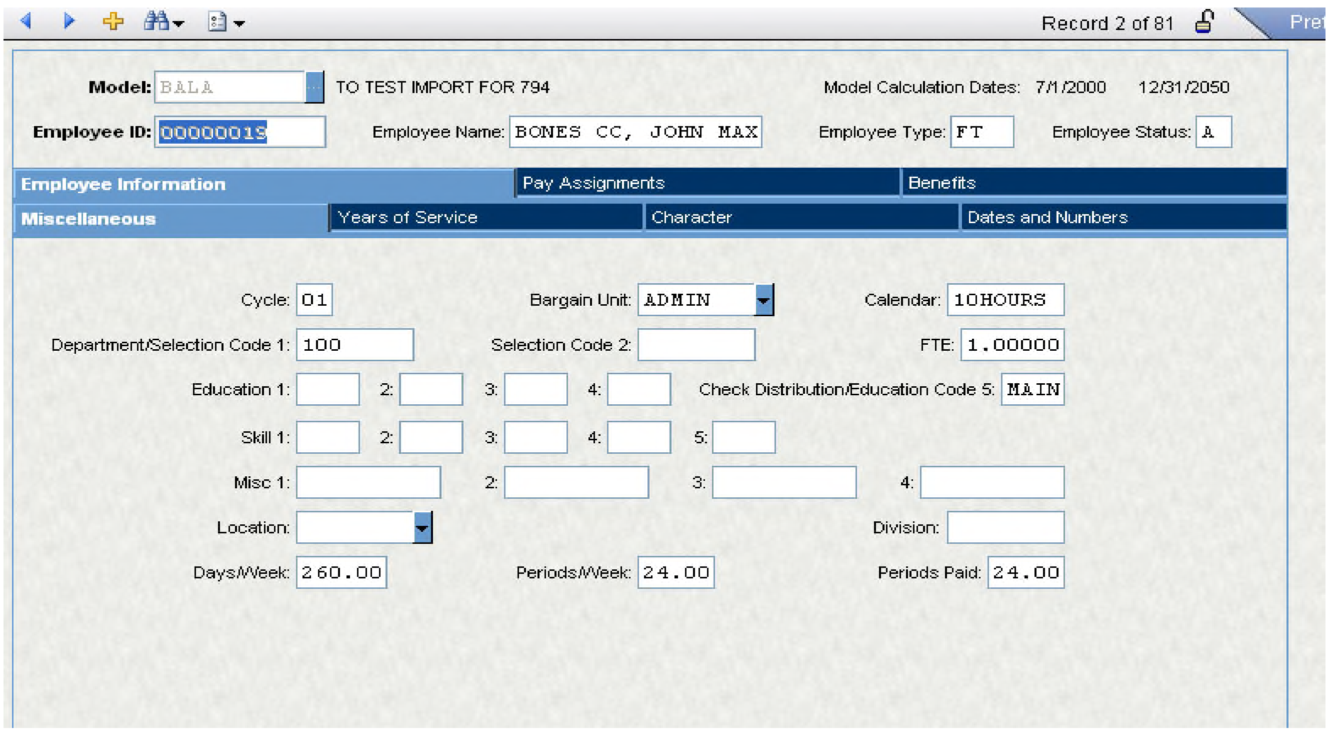
EMPLOYEE INFORMATION - PBUPEM

This screen is divided into three main parts.

The Employee information contains employee demographic information and calculated years of service. Note: All of the displayed fields may be referenced as selection criteria when running utilities on employee records (e.g. step increases, benefit increases, etc.).

The Pay Assignment contains the pay assignments imported from the HR system. Only pay assignments with a Calc DT range that touches the model calculation date range (displayed at the upper right of the screen) will be calculated. Also, the Calc Flag field must contain a Y for a pay assignment to be calculated. Only those employees that have calculated pay assignments will have their benefits calculated. Many of the fields that comprise a pay assignment may be adjusted with the supplied utilities.

The Benefits contains employee benefit information. Only those benefits with a date range that overlaps the model's calculation date range displayed at the upper right of the screen), by at least one day, will be calculated.



Fields Descriptions

Miscellaneous

Model: The imported/entered Model ID.

Model Calculation Dates: The two dates displayed after the Model Description represent the dates that will be used as the model calculation dates. They are on Pay Assignments Information screen strictly as informational fields so that a pay assignment's Calc Dates can be compared to the model's calculation dates.

Employee ID: This field stores the employee ID.

Employee Name: This field stores the employee name.

Employee Type/Status: The employee type is used to “group” or “categorize” employees.

Bargain Unit: Indicates the employee’s primary bargaining unit.

Calendar: Indicates the employee’s primary calendar. Each employee is associated with a calendar. If multiple positions are assigned to an employee, he or she may have different calendars.

Education 1 - 5: Education codes 1 - 5 are miscellaneous fields and may be

used based upon payroll setup.

Skill 1 - 5: Skill codes are an optional field and will be used based upon payroll setup.

Selection Code 1 & 2: Selection codes are an optional field and will be used based upon payroll setup.

Misc 1 - 5: Miscellaneous code is client defined value. The attribute is

defined as an integer. Payroll common codes may be modified to interpret the data differently.

Division: The division code indicates the primary division with

which the employee is associated. If the division organization is not utilized, leave the field blank.

Location: The employee’s work location.

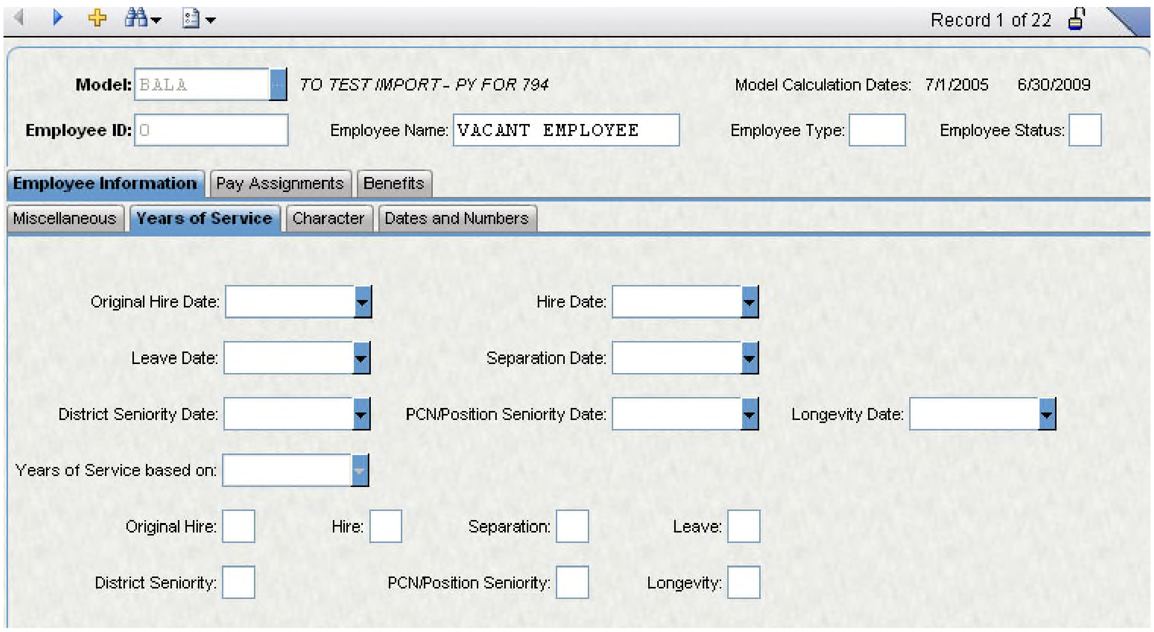
Days/Week: Indicates the number of days per year the employee will

work. This information is critical to retirement processing.

Periods/Week: The number of periods per year the employee will work. This value is critical to PERS/STRS processing and reporting.

Periods Paid: The number of periods to be paid. If on a monthly payroll the number would be 12. If the employee is paid on a bi-weekly payroll, the number of periods would be 26.

Years of Service



Fields Description

Original Hire Date: The “original hire date” may vary from the “hire date” if the individual was a previous employee and is returning to work at the same entity. If this date is after the “Hire Date” an error message will appear.

Hire Date: The employee’s current hire date. It may differ from the original hire date value.

Years of Service based on: This is a copy of the Model Definition Years of Service Date field at the time of the import.

Original Hire: This is the calculated years of service based on the Original Hire date and the Model Definition Years of Service date.

Hire: This is the calculated years of service based on the Hire date and the Model Definition Years of Service date.

District Seniority Date: The employee’s district seniority date is most often used for reporting purposes. The field may also be used for other purposes by entities not using district seniority dates.

Position/PCN Seniority Date: The employee’s position seniority date.

Longevity Date: The longevity date is used for seniority or additional pay purposes and indicates the additional service time being credited to an employee.

Leave: This is the calculated years of service based on the Longevity date and the Model Definition Years of Service date. This field will always identical to the "Long" field because they are based on the same date. This field only exists because it is in the PY system and the term Leave years is meaningful to some clients.

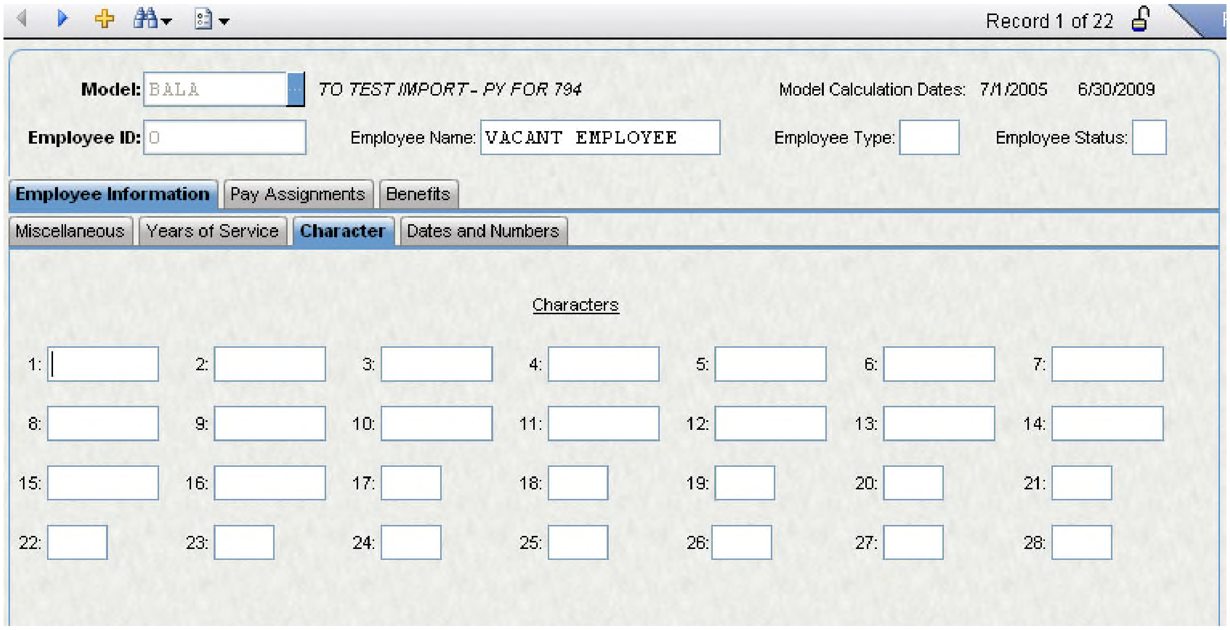
Separation: This is the calculated years of service based on the Term date and the Model Definition Years of Service date.

District Seniority: This is the calculated years of service based on the Dist Sen. date and the Model Definition Years of Service date.

Position/PCN Seniority: This is the calculated years of service based on the POS/PCN date and the Model Definition Years of Service date.

Longevity: This is the calculated years of service based on the Longevity date and the Model Definition Years of Service date. All of the fields on Employee Information screen may be used in selection criteria when running utilities that affect employee data (e.g. pay assignments and benefits).

Character

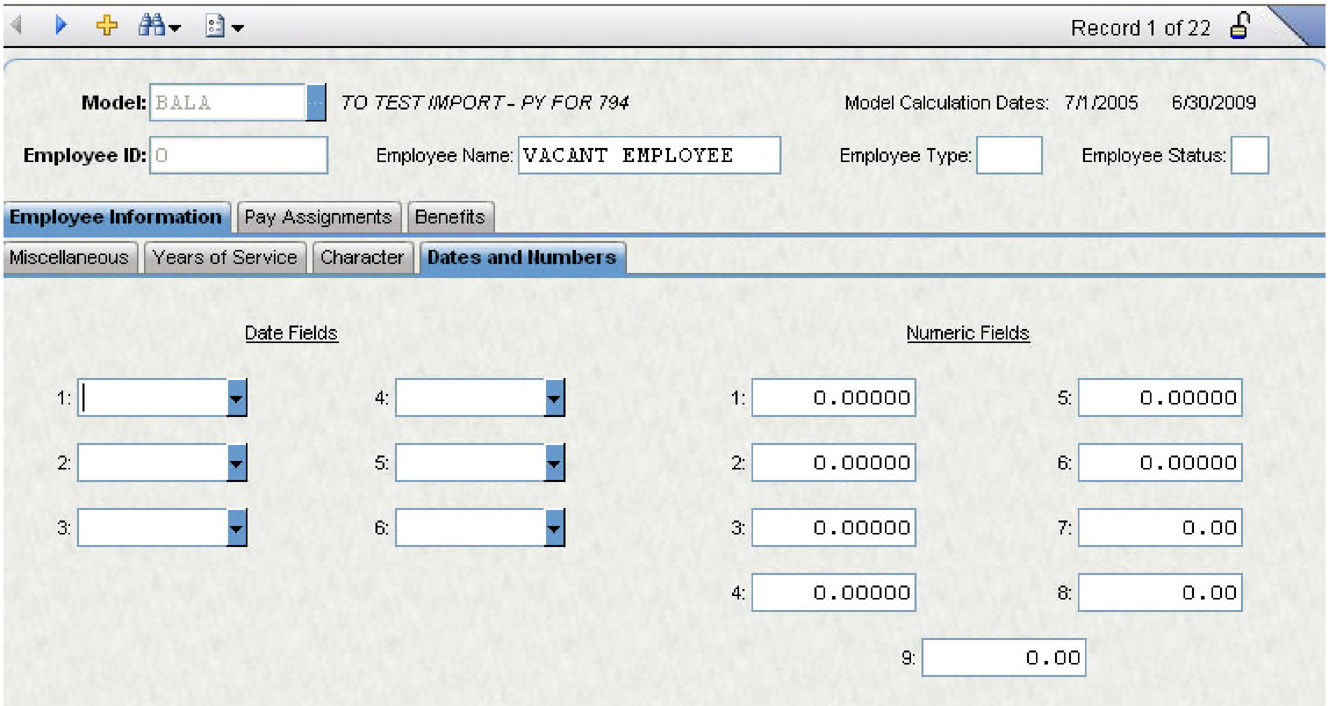


Fields Description

Character Fields 1-16: There are sixteen fields, eight characters in length which may be used in reports or as desired.

Character Fields 17 – 28: There are twelve miscellaneous fields, 4 characters in length which may be used in reports or as desired.

Dates and Numbers

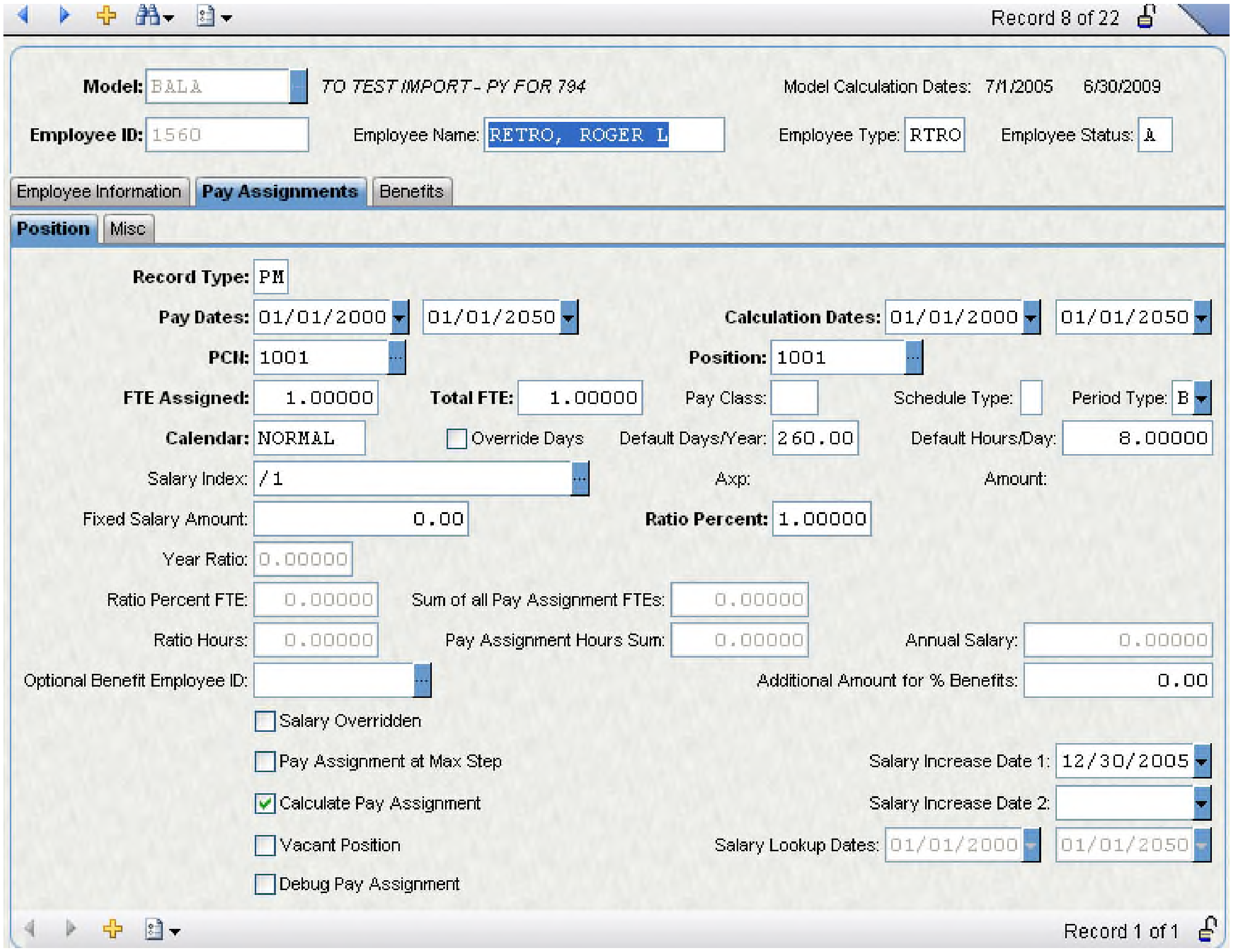


Fields Description

Date Fields (1 - 6): The date fields #1 - 6 are formatted to hold a date (MM/DD/YYYY)

Numeric Fields (1-9): The numeric fields #1 - 6 are formatted to hold a 10 digit number with 5 decimal places (9999.99999

Pay Assignments



Fields Description

Record Type: This field stores the pay assignment record type.

Pay Dates: These fields store the Effective dates for the pay assignment. Note: these dates are not used when calculating the pay assignments date ratio (see the description for the DT Ratio field).

Calculation Dates: These fields store the calculation dates for the pay assignment. These dates are used when calculating the pay assignments date ratio (see the description for the DT Ratio field).

PCN: This field stores the PCN (position control number).

Position: This field stores the Position.

Pay Type: The pay type refers to when the employee receives a paycheck (i.e., bi-weekly, monthly, etc.).

FTE Assigned: This field stores the PCN FTE. If FTE=APU1 or FTE=APU2 is entered into any of the Model Definition Misc fields, then the FTE field will contain either the APU1 or APU2 value.

Total FTE: This field stores the employee's total FTE from Employee Master Screen.

Ratio Percent: This field stores the ratio percent. The ratio percent is used as a multiplier for the salary. Example: If a pay assignment is tied to a salary index with an annual amount of $50,000 and the Rt% field contains 1.10, then the annualized salary will be 50,000 * 1.10.

Pay Class: This field stores the pay class.

Calendar: This field stores the calendar. The calendar is used in conjunction with the Calc dates to determine the number of paid days (stored in the Days field) for the pay assignment. This paid day value is used when a pay assignment is tied to a salary index with an AXP of "H" or "D".

Days Override: Set this field to "Y" if the calculated number of paid days is to be overridden.

Default Days/Year: This field stores the number of paid days for the displayed calendar and Calc date range. It is used in the salary calculation for pay assignments with salary index amounts that have an AXP of "H" or "D".

Default Hours/Day: This field stores the hours per day associated with the pay assignment. It is used in the salary calculation for pay assignments with salary index amounts that have an AXP of "H".

Salary Index: This field stores the salary index. It is populated with the salary index from Employee Pay Information. After importing data into a model, this field could be blank for two reasons:

1) The imported pay assignment is tied to any type of Min/Max salary index (schedule types 2, 3, and 4).

2) The imported pay assignment had its salary overridden (the Employee Pay Ovrd Salary field is "Y").

In these two cases the salary index is left blank and the actual annual salary is imported into the Flat Slry field. The salary index is left blank, because in these two scenarios, the salary index does not tie directly to the amount on the salary table because the amount has been hand entered. If the salary indexes are to always be imported, then see the documentation for the Model Definition screen regarding the USEINDEX Misc field code.

AXP: This field is an echo field that displays the associated AXP for the displayed salary index.

Amount: This field is an echo field that displays the associated amount for the displayed salary index.

Fixed Salary Amount: If the imported pay assignment has been overridden, then this field will contain the Actual Annual salary from the Employee Pay screen. The amount in this field is budgeted for the pay assignment and is not altered. See the documentation for the Model Definition screen Misc fields and the PRORTESAL$ code for an exception.

Ratio Percent: This field stores the ratio percent. This field is multiplied by the calculated annual salary. If this field is other than 1.00000, then the annual salary will be altered.

Year Ratio: This field is calculated when the model is calculated or when the Calc Pay Assign Ratio FTEs/Hrs utility is run. It indicates the percentage of the Model Calculation dates that are encompassed by the pay assignments calc dates.e.g., If the model calculation dates are 01/01/2003 - 12/31/2003 and the pay assignments calc dates are 01/01/2003 - 09/30/2003, then the date ratio will be .75 because the pay assignment's calc dates encompass ¾ of the model's calculation date range. The date ratio is used to prorate the annualized salary for the pay assignment. e.g., If the pay assignment is tied to a salary index with an AXP of M and an amount of $2000, then the annualized amount would be 12* 2000 = $24,000. The amount budgeted for the pay assignment though would be this annualized amount multiplied by the date ratio. So for the example above, the budgeted amount would be 24,000 * .75 = $18,000.

Calculated Annual Salary: This field is populated by the calculation program and displays the final calculated annual salary.

Ratio FTE: This field displays the prorated value of the FTE * DT Ratio.

Ratio FTE Sum: This field displays the sum of all Ratio FTE's for an employee in a model.

Ratio Hrs: This field displays the prorated value of the Hours * DT Ratio.

Ratio Hrs Sum: This field displays the sum of all Ratio Hrs for an employee in a model.

Salary Overridden: The field will contain a Y if the pay assignment's salary was overridden in the HR system.

Pay Assignment at Max Step: This field can be set to Y with the Apply Step Increases utility (mask TDPBUPAI) for pay assignments that are at the maximum step. This field can then be used as selection criteria for the Increase Flat Amounts utility (mask TDPBUPIA) if pay assignments at the maximum step should receive a flat amount bonus or stipend.

Sal Inc Dates 1&2: These fields are used in conjunction with the Apply Step Increases and Increase Flat Amounts utilities. They contain employee specific dates that can be used as begin dates for new pay assignments. How they are populated is determined on the Setup Global data screen. If, for example, the Sal Inc Date 1 field is to be populated with the employee's hire date, then this field will contain the that date, but the year will be modified to fall within the date range of the model. This year modification is required for the date to be used as a begin date for new pay assignments.

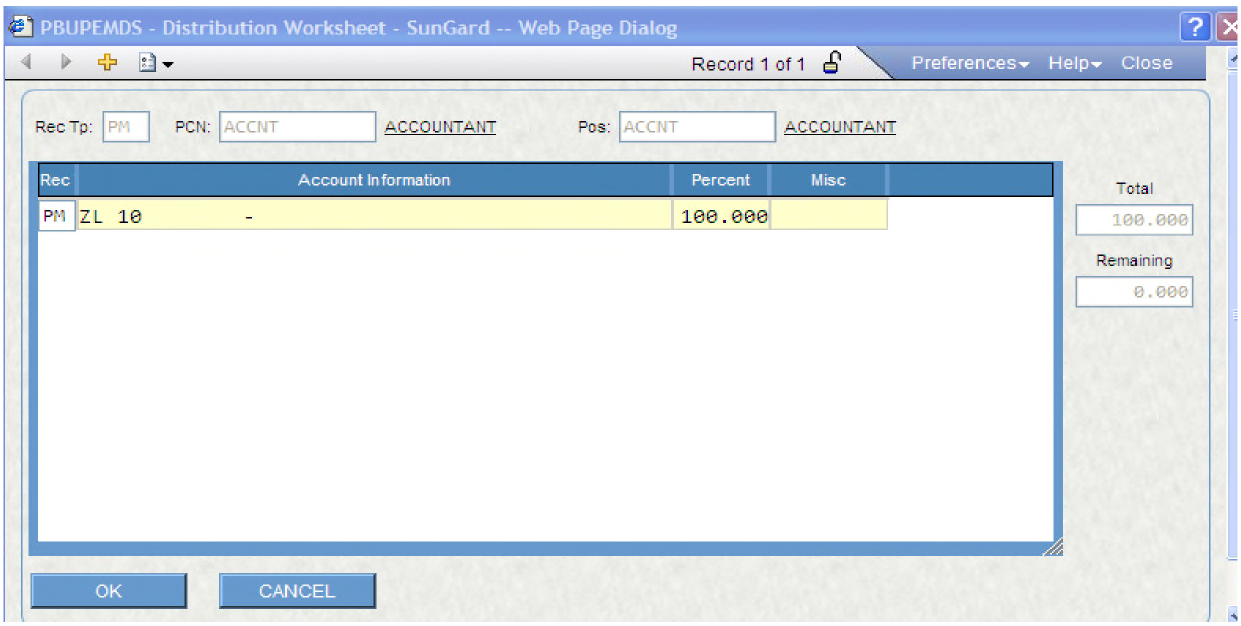
Calculate Pay Assignment: This field determines whether the pay assignment will be calculated. After a full import or after a pay assignment is modified in any way, this field will be set to Y. After a model is calculated, this field will be set to N. The calculation program will prompt the user as to whether this field should be set to Y for all pay assignments within the model being calculated. If the user responds with an N to the prompt, then only those pay assignments that have been modified since the last calculation will be calculated. Note: If a pay assignment is modified, either by hand or by a utility, the Calc Flag field for all pay assignments assigned to that employee will be set to Y.

Vacant Position: This field will be set to Y for records that were inserted from the Vacant Position Information screen.

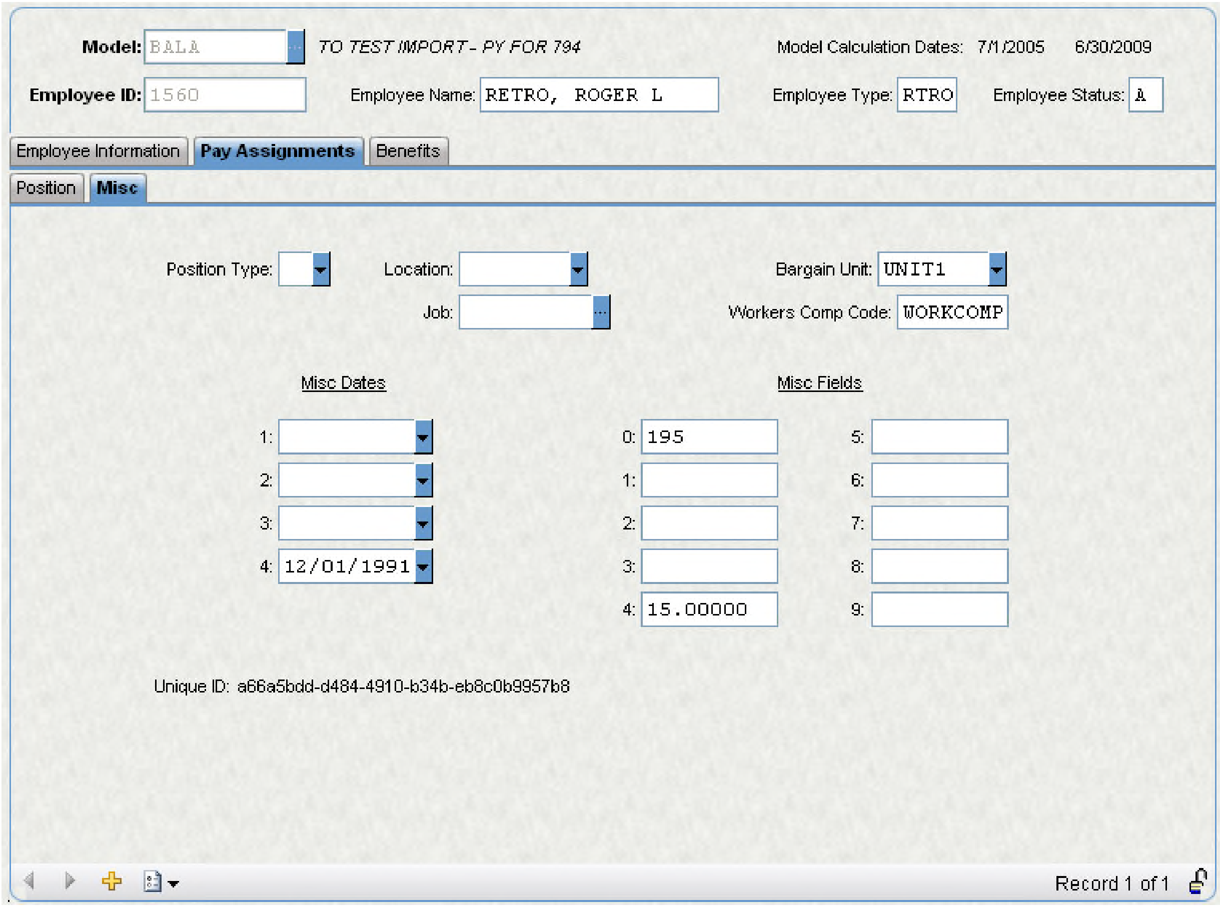
Debug Pay Assignment: If a pay assignment is not calculating, this option will check for several known causes and display any problems with the pay assignment to the screen.

Salary Lookup Dates: This field displays the dates that will be used when selecting salary index amounts from Salary Table Information.

Distribution Worksheet: To view the distribution worksheet select the options button at the bottom oft the screen and select distribution worksheet. This screen enables you to view and change the distribution.



Misc



Fields description:

Position Type: This field contains the first two characters of the PCN Validation Position Type for the PCN/Position. This field is used when the CDH Key/Obj Vectoring options PTB or PTV are active or if different posting strategies based on position type (e.g. classified vs. certified) are used for worker's compensation.

Bargain Unit: The bargaining unit associated with the displayed pay assignment.

Location: The location associated with the PCN/Position.

Workers Comp Code: This field displays the worker's comp code associated with the displayed Job code. The value in the field is used to determine the correct worker's comp rate from the Workers comp Setup screen. If this field is blank then worker's comp will not be calculated for the pay assignment.

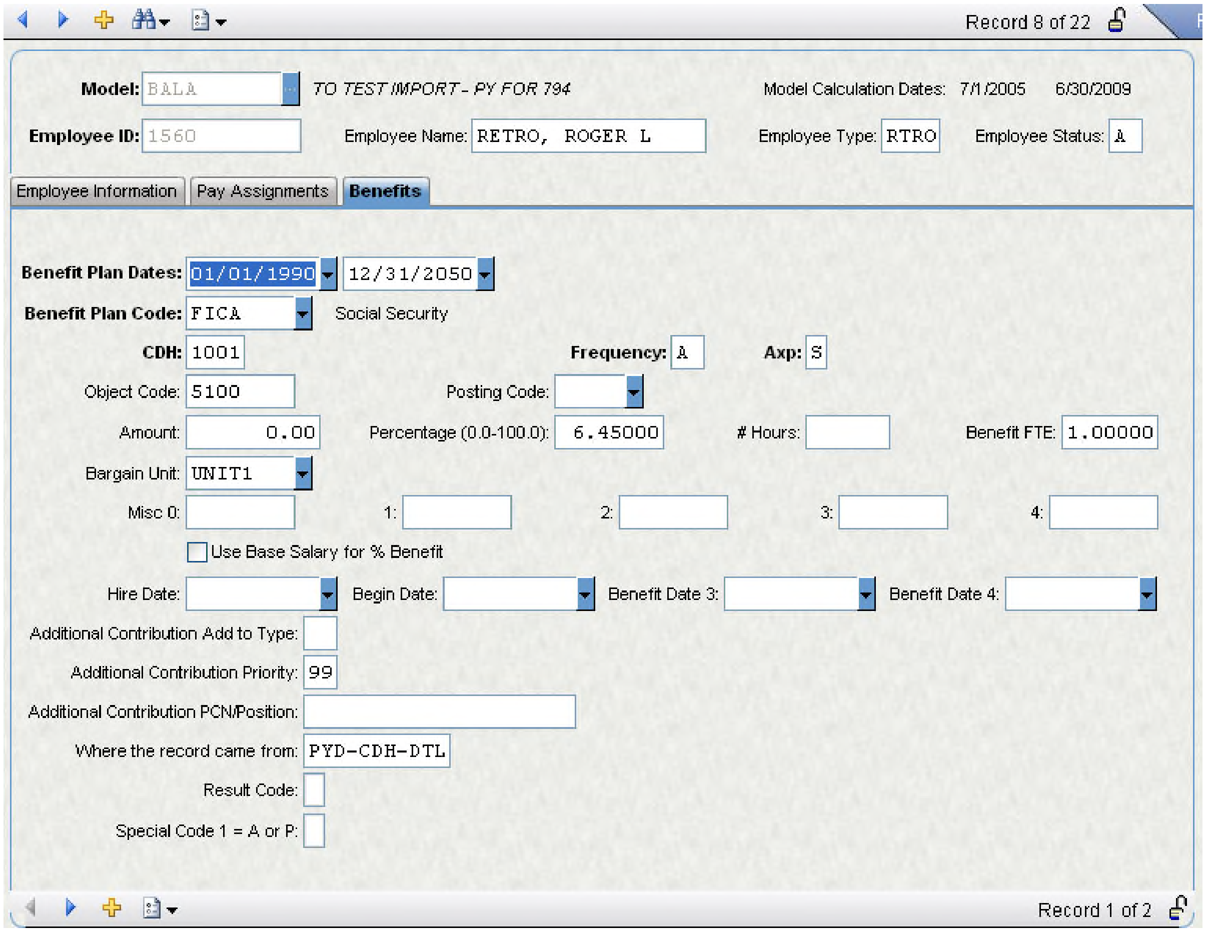
Job: This field displays the job code associated with the PCN/Position.

Misc Dates 1-4: The Misc Dates 1 & 2 fields are populated with employee specific dates based on the PBSTRQ screen. These dates can be used as selection criteria when running pay assignment utilities. The Misc Date 3 field is populated with the employee's original hire date from Employee Master. The Misc Date 4 field is populated with the employee's hire date from Employee Master. Both of these dates may also be used as selection criteria when running pay assignment utilities.

Misc Fields 0-9:   These miscellaneous fields are designed to be used as selection criteria fields when running pay assignment utilities. They are populated based on entries made on the PBSTRQ screen. If DEBUG is entered into any of these fields, then debug for this pay assignment will be displayed. The debug will be displayed even if the Model Definition "Debug" field is not set to 2 (display calculation debug). This enables debug for just a specific pay assignment to be displayed.

Display unique ID: This option will display the pay assignment's unique ID.

Benefits



Field description:

Benefit Plan Dates: These fields display the assigned benefit date range.

Benefit Plan Code: The Plan field represents the benefit plan code. This field validates to the PBTBBE screen and will only allow entry of benefit plans with a PBTBBE date range that spans the Employee Benefits Information date range. Only Benefit Information actually has a benefit plan on the screen, CDH ASSIGNMENT SCREEN, Mandatory Taxes, and Additional Contributions populate this field via the import file. For Mandatory Taxes, the Plan field is populated with the type of contribution (e.g. FICA, SUI, SDI, MEDICARE, etc.). CDH ASSIGNMENT SCREEN and Additional Contributions populate the Plan field by using the first eight characters of the Desc field. (This field is the description for the CDH in payroll). If a record is hand entered into Employee Benefits Information, the screen will be populated with PBTBBE data after making an entry into the Plan field and exiting the field.

CDH: This field displays the CDH associated with the benefit plan.

Object Code: This field displays the object code associated with the benefit plan. If the object code is on the CDH definition in payroll the import will bring in the object code. This object code will be used as the posting object code when the model is calculated. If this field is blank and the PstTo field is blank, then the object code(s) from the employee's pay assignment(s) will be used. If the PstTo field is not blank, then the displayed object code is ignored because a special posting option is being used for the benefit.

Frequency: This field stores the frequency associated with the benefit. This field can have an effect on how the benefit is calculated.

AXP: This field displays how the displayed amount/percent is expressed. E.g., A - annual, M- monthly, S- semi-monthly, etc.

CDH Description: If the "From" field contains Benefit Information, then this field will contain the PBTBBE short description for the benefit plan. If the "From" field does not contain Benefit Information, then this field will contain the CDH description stored in the PY CDH definition master.

Hours: This field will always be 0 unless the record was imported from CDH ASSIGNMENT SCREEN and was assigned a 3000 series CDH (e.g. an hour code). This field will then be interpreted as the number of hours associated with the record. The value will come from the CDH ASSIGNMENT SCREEN. Amount field. For this type of record to calculate, the SQL Storage Update Screen must be used to set the Employee Benefits Information $ field to the appropriate hourly rate. That rate will then be multiplied by the value in the Hrs field to determine the benefit amount.

Amount: If the field contains a value other than 0, then the import program determined that the imported record was a flat dollar benefit. Percent benefits and flat dollar benefits with an amount of 0 will populate this field with a 0. See the documentation for the "Cd1" field for some related information.

Percentage: If this field contains a value other than 0, then the import program determined that the imported record was a percent benefit. Flat dollar benefits and percent benefits with a value of 0 will populate this field with a 0.

Benefit FTE: This field will contain the Benefit Information Benefit FTE. If the record originates from a screen other than Benefit Information, this field will be populated with 1.00000.

Bargain Unit: This field contains the employee's bargaining unit from the Employee Master screen.

Misc 0-4: The five Misc fields can contain employee specific data that the benefit utilities can used as selection criteria. The Misc fields are populated based on set up on the PBSTRQ screen. The Misc fields also can be used to trigger special benefit processing features.

The following codes are supported:

DEBUG: If this code is entered into any of the Misc fields, then details on how the benefit is calculated will be displayed. The debug will be displayed even if the PBSTRQ "Debug" field is not set to 2 (display calculation debug). This enables debug for just a specific benefit to be displayed.

PCTRTxx: This code is only supported for percent benefits. If this code is entered into any of the Misc fields for a percent benefit, then the benefit will only be calculated on the pay assignment(s) with the record type specified by xx (Note xx must be replaced with the desired record type). This code is generally used if an employee has a primary pay assignment (record type PM) and one or more temporary or seasonal pay assignments that a percent benefit should not be calculated on.

EMPFTE: This code is only supported for flat amount benefits. If this code is entered into any of the Misc fields for a flat amount benefit, then the benefit's annualized amount will be prorated by the employee's FTE from Employee Information. Note: If a Employee Benefits Information record has EMPFTE and BENEFTE in its Misc fields, then the BENEFTE code will be ignored and the EMPFTE code will be used.

BENEFTE: This code is only supported for flat amount benefits. If this code is entered into any of the Misc fields for a flat amount benefit, then the benefit's annualized amount will be prorated by the employee's benefit FTE from Employee Benefits Information. Note: If a Employee Benefits Information record has EMPFTE and BENEFTE in its Misc fields, then the BENEFTE code will be ignored and the EMPFTE code will be used.

Slry: If the benefit is a percent benefit and it is to be calculated only on the employee's base salary (e.g. ignoring any ADDLCDHS set up, see the PBSTIS documentation for more information), then this field must be set to Y. This can be done by hand or with the PBUTPU screen.

Hire: This field contains the employee's Employee Master Hire date with the year modified to fall within the model's date range. It can thus be used as an employee specific new begin date by the benefit utilities.

Beg: This field contains the employee's Employee Master Original Hire date with the year modified to fall within the model's date range. It can thus be used as an employee specific new begin date by the benefit utilities.

Two Date Fields Following the Beg Field: These two date field function the same as the Hire and Beg fields, but they may be populated with an employee specific date specified on the PBSTRQ screen. The field tags for these fields is based on the set up on PBSTRQ. These dates can also be used as new begin dates by the benefit utilities.

Additional Contribution Add Type: If this benefit came from the pay related contributions screen in HR the field will contain the codes found in the ADD to PCN/ID.

Additional Contribution Priority: If this benefit came from the pay related contribution screen in HR this field will contain the priority for the contribution assignment.

Additional Contribution PCN/Position: If this benefit came from the pay related contribution screen in HR this field will contain the associated PCN and Position attached to the assignment.

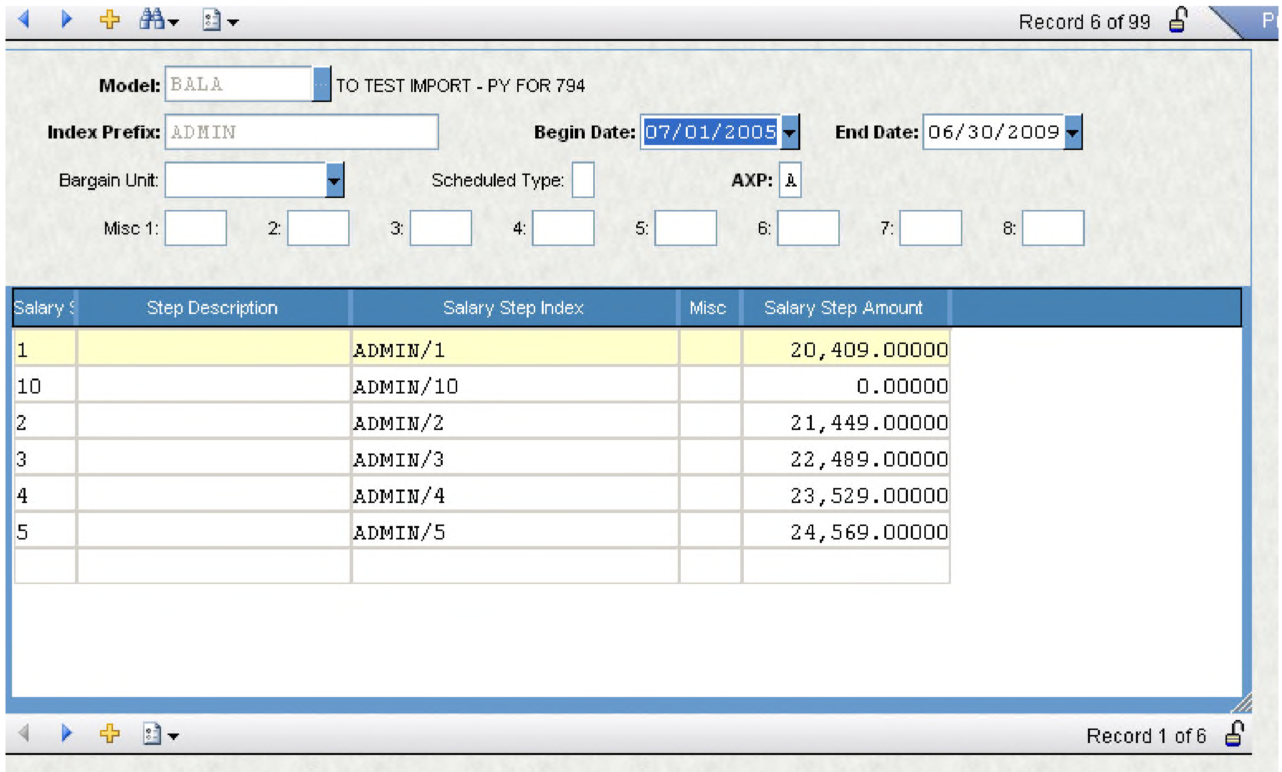
Where the record came from: This field displays where the Benefit Information record originated from.

Result Code: This field indicates if a detail entry was found in payroll for the displayed CDH. If this field is blank, then a single detail entry was found in payroll. If this field contains an N, then the import program was not able to find a single detail record in PY for the CDH spanning the Benefit Information date range or with blank dates. If this field is N, then the "Object" field will be blank because the object code is derived from the payroll detail entry. If this field is an M, then multiple detail records were found in payroll for the CDH with a date range spanning the Benefit Information date range or with blank dates. Again, the Obj field will be blank because the system will not know which detail entry to use.

Special Code: The Cd1 field indicates the value of the Special Code 1 field on CDH ASSIGNMENT SCREEN. The Special Code 1 field on CDH ASSIGNMENT SCREEN is used to indicate if the amount entered is a flat dollar or percent. If the Cd1 field is blank, then the Special Code 1 field is either an A or P. This is normal. If the Cd1 field is an N, then the misc code 1 field on CDH ASSIGNMENT SCREEN is not equal to A or P. In that case the amount on CDH ASSIGNMENT SCREEN will be assumed to be a flat dollar amount.

PBTBSL - Salary Table Information.

This screen contains salary table records from the HRTBSL screen. The amounts on this screen are used by PB pay assignment screen in conjunction with the salary index and salary look up dates to determine an initial salary amount for the pay assignment.



Field Descriptions

Model: This field stores the Model.

Index Prefix: This field represents the displayed salary indexes without the steps. The Index Prefix can be used as a selection criteria field for performing salary table increases that include the entire salary table.

Begin Date: This date represent the date that the salary table is active.

End Date: This date represent the date that the salary table is active.

Bargain Unit: his is populated with the bargaining unit.

Scheduled Type: This field represents the type of salary schedule that the displayed salary table is attached to.

AXP: This field indicates how the Amount field is treated in determining an annual salary.

Misc 1-8: These fields will display any entered values from the eight Misc fields from HRTBSL screen.

Step: This field is the step value associated with an individual salary index.

Step Description: This field displays the description for a particular step. Note: When the step increase utility is run, the "next step" is simply the next displayed step on the salary table. Using the displayed salary table as an example, if an employee was on step 07 and they received a step increase, they would move to step 08. If any step is not to be considered a valid step to move to when performing a step increase, then enter NOSTEP anywhere in the step description field. This can be done by hand, in HR and imported into the model, or it can be set using the PBUTPU screen.

Index: This field is the concatenation of the Index Prefix and Step fields. This is the index that is assigned on TDPBUPEM screen.

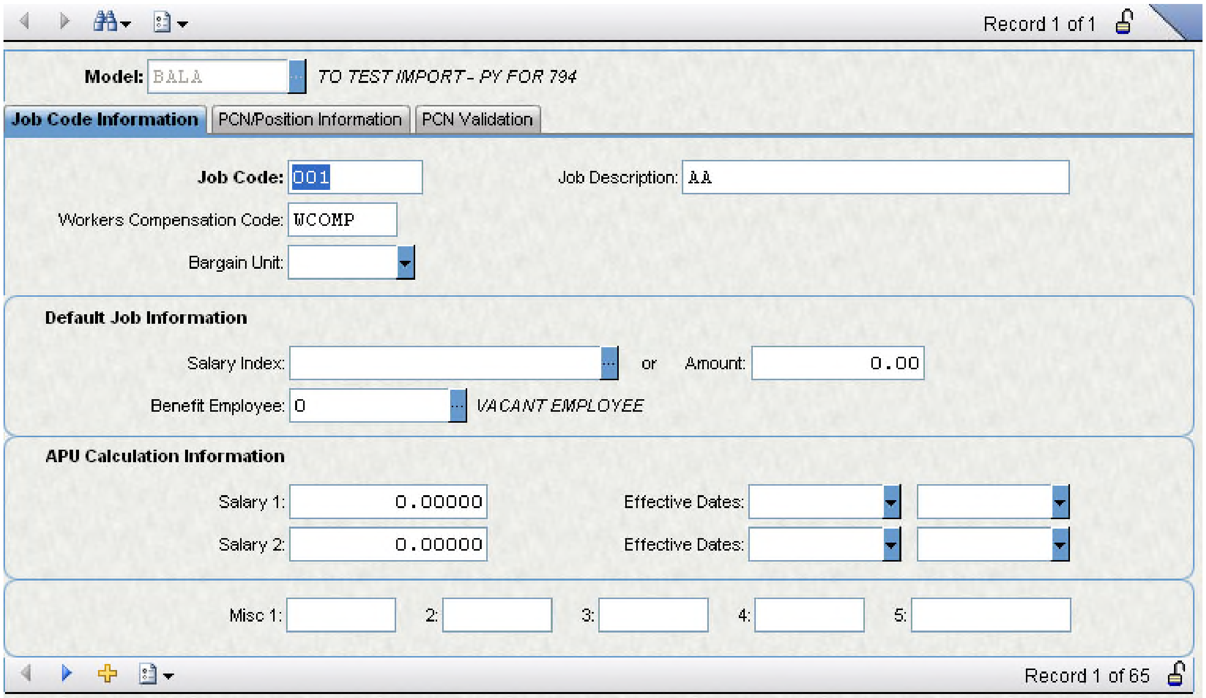
Amount: This field represents the amount associated with an individual salary index.

Misc: This field displays the value entered in the Misc field from HRTBSL screen. This misc field is unique per salary index as opposed to the eight 4-character Misc fields at the bottom of HRTBSL screen. The salary index Misc fields from HRTBSL screen can be used to re-order an HR salary table when it is imported into the model.

PBTBPS – Position Information.

Job Code Information

The Job Information tab contains records regarding job code information. This screen is used as a PCN/Position tab's validation screen and the fields under the DEFAULT JOB INFO header can, in certain situations, affect the budget calculation.



Field Descriptions

Model: This field stores the Model ID.

Job Code: This field contains the job code.

Job Description: This field contains the Job description.

Work Compensation Code: This field displays the worker's compensation code associated with the job code.

Bargain Unit: This field displays the worker's compensation code associated with the job code.

Salary Index: This field is used to determine the initial salary amount if a pay assignment's salary index contains DEFAULT. This value of DEFAULT would generally be assigned on the PBUPVP screen and used for vacant pay assignments. If the salary index contains DEFAULT, then the salary index stored on the appropriate Job Code Information record is used to select an amount and AXP from PBTBSL.The amount and AXP are then used in determining the pay assignment's calculated salary.

Amount: This field functions the same as the Salary Index field in that it is only used for pay assignments with a salary index of DEFAULT. It is only used if the Job Code Information tab’s Salary Index field is blank. The amount field is then used as an initial annual salary for the pay assignment.

Benefit Employee: This field is only used when calculating a vacant position. A vacant position is one that contains any of the following:

Employee ID = 0

Record Type = VC

Record Type = DF

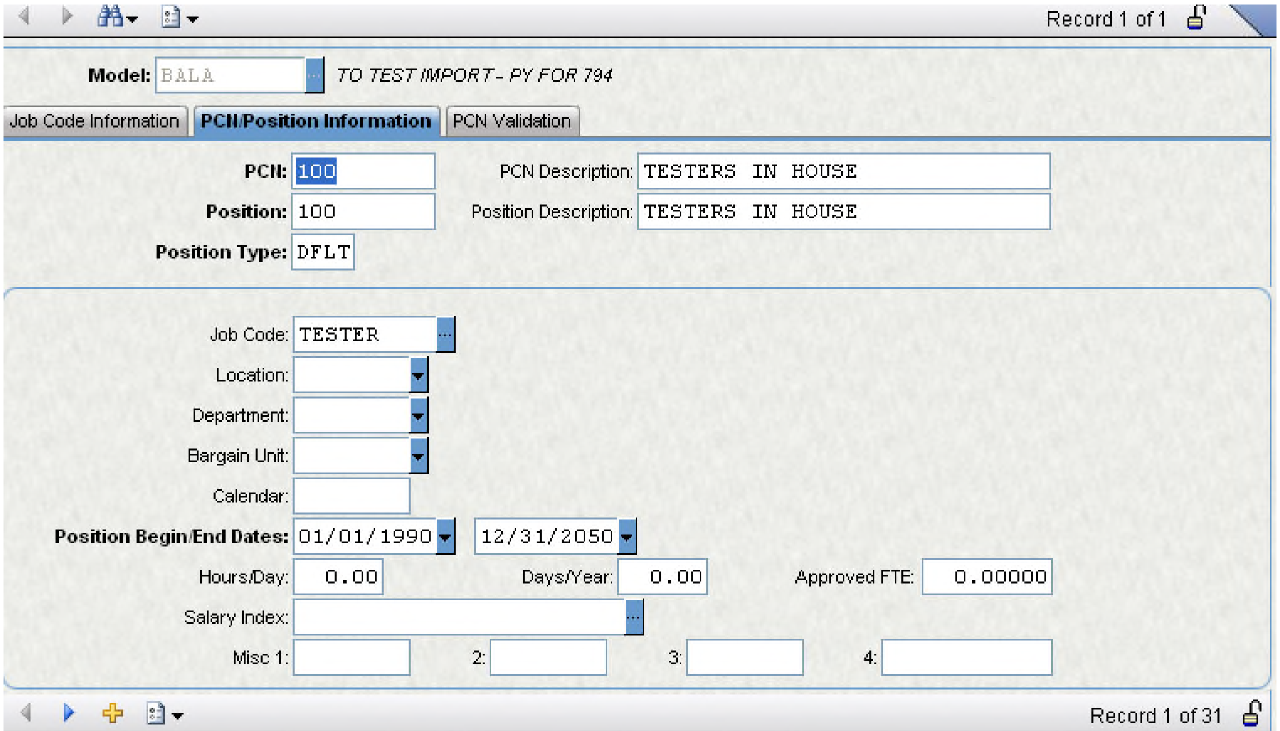
Vacant field = Y

When calculating a vacant pay assignment, the system checks if the employee ID associated with the pay assignment exists on the TDPBUPEM’s Benefit tab. E.g., does the employee ID associated with the vacant pay assignment have any benefits assigned on TDPBUPEM’s Benefit tab. If the ID is not found on TDPBUPEM’s Benefit tab, then the ID stored in the Job Information tab’s Benefit Employee field is used. The benefits associated with that ID will then be calculated for the vacant pay assignment.

The six fields under the "Apu Calculation Information" header are specific to a particular client.

PCN/Position Information:

Many of the fields on PCN/Position Information tab are used for validation on the Pay Assignment screen (PBUPEM’s Pay Assignment tab). Thus, if a new position is to be budgeted for, it will first need to be entered on the PCN/Position Information tab before it can be entered on the PBUPEM’s Pay Assignment tab or PBUPVP screens. Note: a new position is different from a vacant position. A vacant position is one that currently exists in the HR system, but does not have an employee assigned to it. Since it exists in HR, it would be imported into the PCN/Position Information tab screen. A new position is one that does not currently exist in the HR system, thus it would need to be hand entered on PCN/Position Information tab. The position could then be assigned to an employee on Pay assignment and thus be budgeted for next year. None of the fields on this screen affect the budget calculation.



Field Descriptions

PCN: This field displays the PCN.

PCN Description: This field displays the PCN description.

Position: This field displays the Position.

Position Description: This field displays the Position description.

Position Type: This field displays the position type (e.g. CLxx, CExx, CYxx) associated with the PCN/Position.

Job Code: This field displays the job code associated with the PCN/Position.

Location: This field displays the location associated with the PCN/Position.

Department: This field displays the department associated with the PCN/Position.

Bargain Unit: This field displays the bargaining unit associated with the PCN/Position.

Calendar: This field displays the calendar associated with the PCN/Position.

Position Begin/End Dates: These fields display the active dates for the PCN/Position.

Hours/Day: This field displays the hours per day associated with the PCN/Position.

Days/Year: This field displays the days per year associated with the PCN/Position.

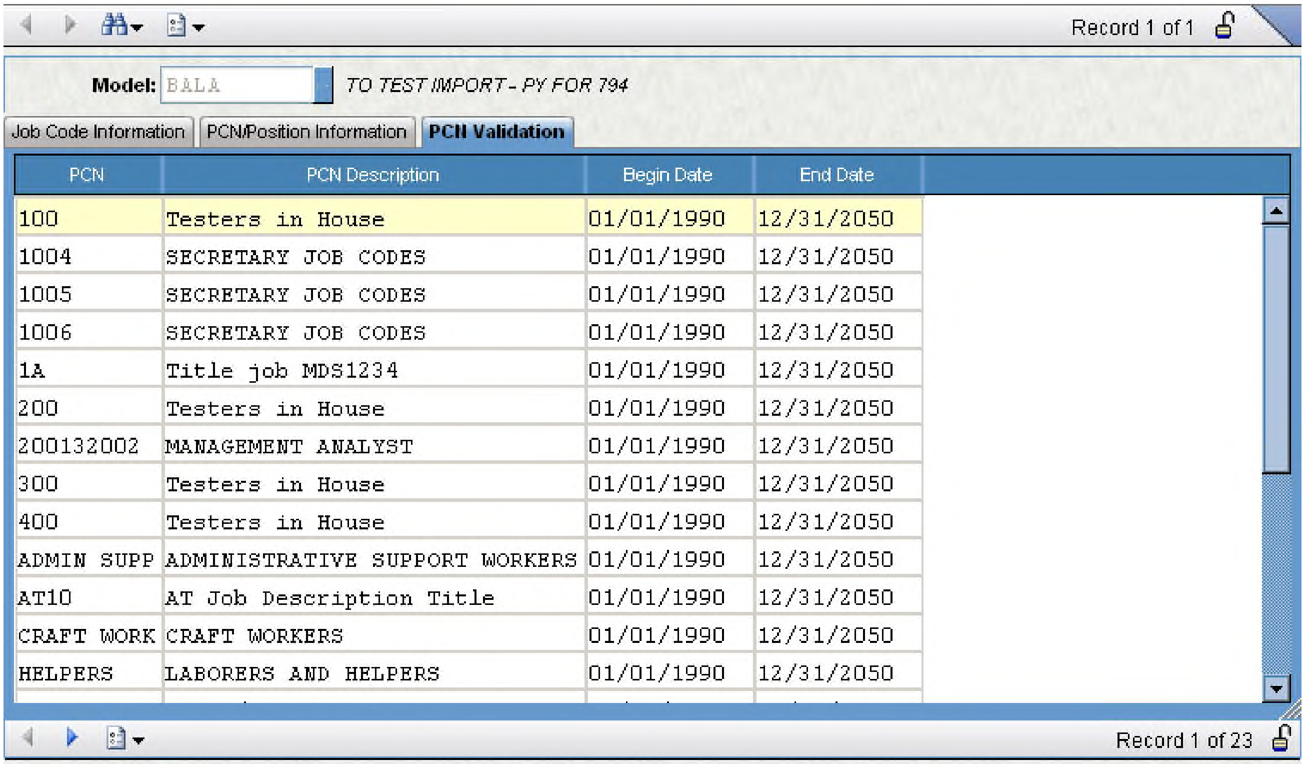
Approved FTE: This field displays the approved FTE for this PCN/Position.

Salary Index: This field displays the salary index associated with this PCN/Position.

Misc 1-4: These miscellaneous fields may be used to store any client-desired data. They are populated from the HR Position Definition Misc 1-4 fields.

PCN Validation

The PCN Validation tab stores unique PCN numbers and is used by the PBUPEM's Pay Assignment tab's PCN field as a validation table. It is populated by the import program. This screen does not need to be updated by the user. If a new PCN is needed on PCN Validation, then when an entry on PCN/Position information tab is made with the desired PCN, a new record will be created in PCN/Position information tab for that PCN.



Record 1 of 1

Model: BALA TO TEST IMPORT - PY FOR 794

Job Code Information | PCN/Position Information | PCN Validation

PCN	PCN Description	Begin Date	End Date
100	Testers in House	01/01/1990	12/31/2050
1004	SECRETARY JOB CODES	01/01/1990	12/31/2050
1005	SECRETARY JOB CODES	01/01/1990	12/31/2050
1006	SECRETARY JOB CODES	01/01/1990	12/31/2050
1A	Title job MDS1234	01/01/1990	12/31/2050
200	Testers in House	01/01/1990	12/31/2050
200132002	MANAGEMENT ANALYST	01/01/1990	12/31/2050
300	Testers in House	01/01/1990	12/31/2050
400	Testers in House	01/01/1990	12/31/2050
ADMIN SUPP	ADMINISTRATIVE SUPPORT WORKERS	01/01/1990	12/31/2050
AT10	AT Job Description Title	01/01/1990	12/31/2050
CRAFT WORK	CRAFT WORKERS	01/01/1990	12/31/2050
HELPERS	LABORERS AND HELPERS	01/01/1990	12/31/2050

Record 1 of 23

Field Descriptions

PCN: This field stores a unique PCN number used by the PBUPEM's Pay Assignment tab's PCN field for validation.

PCN Description: This field displays the PCN description.

Begin-End dates: These dates indicate the active date range of the PCN. The dates are also used as filters for the PBUPEM's Pay Assignment tab's PCN pick list. Only PCN's with a date range spanning the PBUPEM's Pay Assignment tab's Calc date range will be displayed.

PBTBLC - LOCATION TABLE

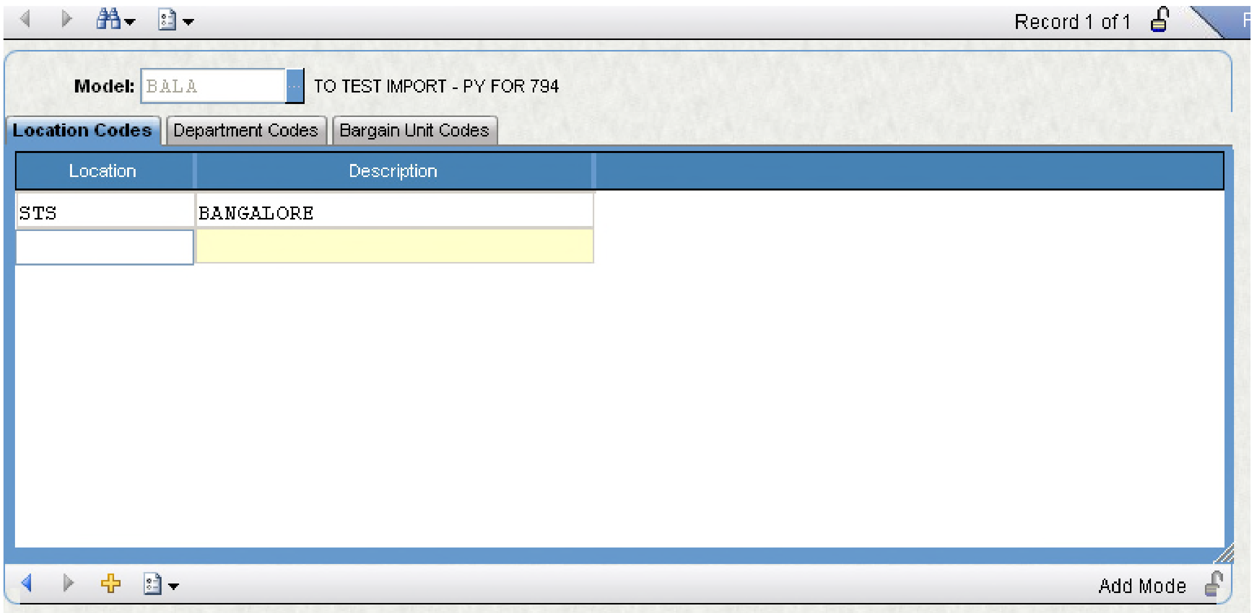
This Screen has three Sections.

First Section under Location Codes Tab contains location codes and descriptions. This screen is only used as a validation table for any other PB screen that has a location field.

Second Section under Department Codes Tab contains job codes and descriptions. This screen is only used as a validation table for any other PB screen that has a department field.

Third Section under the Bargain Unit Codes contains bargaining unit's descriptions. This screen is only used as a validation table for any other PB screen that has a bargaining unit field.

Location Codes Tab



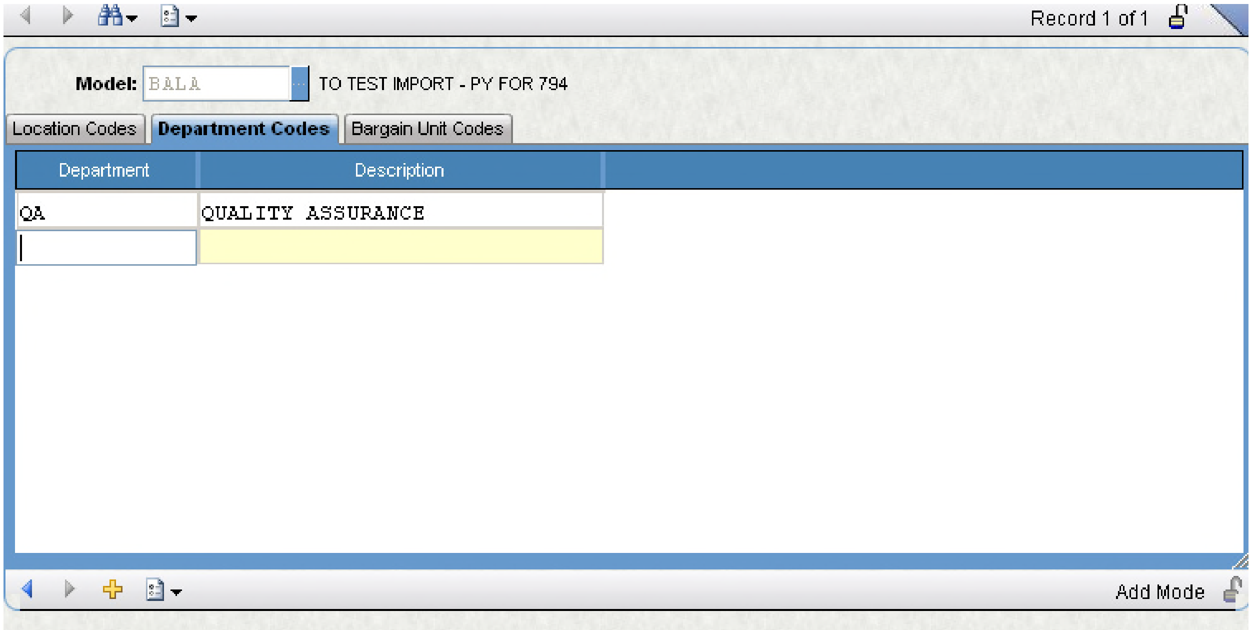
Field Descriptions:

Model: A look-up Field. This field uniquely identifies the Model ID.

Location: This Field contains the Location Unit Code.

Description: Contains Brief Information about the Location Code.

Department Codes Tab:

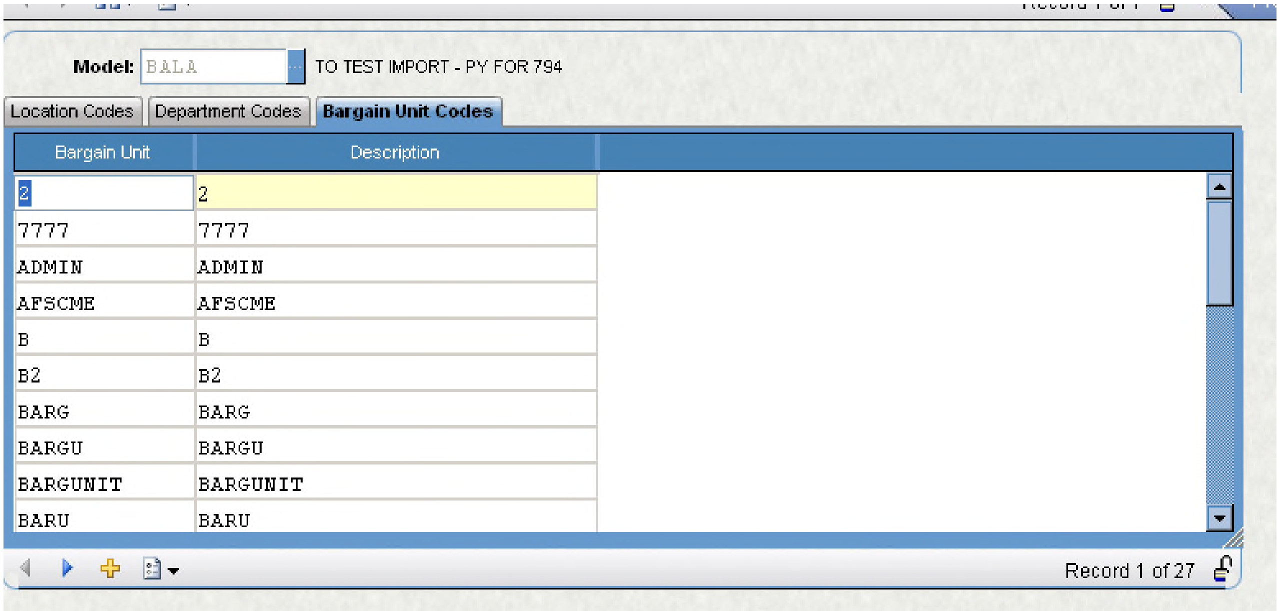


Field Descriptions:

Department: This Field contains the Department Unit Code.

Description: Contains Brief Information about the Department Code.

Bargain Unit Codes Tab:



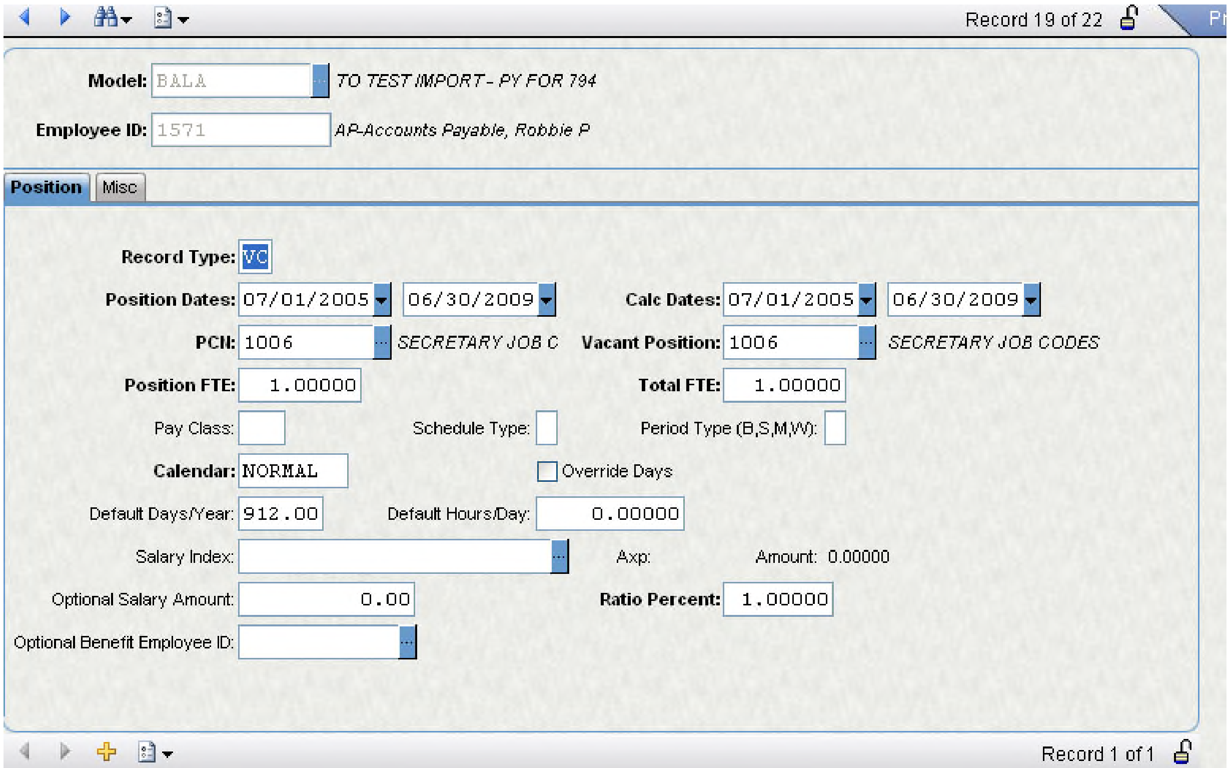
Field Descriptions:

Bargaining Unit: This Field contains the Bargaining Unit Code.

Description: Contains Brief Information about the Bargaining Unit Code.

PBUPVP - Vacant Position Information

The PBUPVP screen is used to store pay assignments associated with vacant positions so that the vacancies will be included in the budget.These records, once inserted via the "Insert into PB" field, will create records for the PBUPEM screen. Those records will then be calculated and included in the budget. If a default amount of benefits is to be calculated for a vacant position then either the ID needs to be 0 or the record type (RcTP) needs to be VC. A date range that falls within or is equal to the model's date range should be entered. The PosFTE, TotFTE, and Ratio% will all default to 1.00000. They may be overridden. If multiple vacant positions of the same position are to be entered, then the PosFTE should equal the total number of FTE for the vacant positions while the TotFTE should equal 1.00000. For example, if 10 vacant fire fighter positions are to be inserted, the the PosFTE will be 10 and the TotFTE will be 1.00000. If a salary amount of $50,000 is entered, then the calculated amount for the 10 vacant positions will be: 50,000 * (10 / 1.00000) * ratio% * date ratio A salary index or amount needs to be entered for each vacant pay assignment. Enter a PCN and Position for each entry on PBVACPOS. The Hrs, Days, and Prd Type fields are only used if the pay assignment is attached to a salary table that is expressed as an hourly or per period amount. The Work Comp field may be entered if an amount for worker's compensation is to be calculated. The Barg Unit, Misc0 - 9, and Date1 - 2 field may be entered to be used as selection criteria when performing adjustments. At lease one org key and percent must be entered.Whether an object code needs to be entered is client specific. When all the entries for a model have been entered on PBUPVP, then while in BROWSE mode, run the Insert Tool. A message will appear on the screen indicating the vacant pay assignments that were inserted.



Field Descriptions

Model: This field displays the Model.

Employee ID: This field displays the ID for the vacant pay assignment.

Record Type: This field stores the vacant pay assignment's record type. This field will default to VC, but may be changed to any other record type. The value of VC is an indicator of a vacant pay assignment. The other indicators are:

Employee ID = 0

Record Type = DF

Vacant field = Y

Remember that the "Insert into PB" field functionality deletes all PB pay assignment records with the vacant field set to "Y". If some of those records have had the Vacant field cleared so that they will not be deleted and the TDPBTBPS default benefit selection is to be used (see the doc for the PCJOBTBL Benefit Employee (ID) field), then the record type of VC should be kept to maintain the fact that the pay assignment is a vacant one. S

PCN: This field stores the PCN associated with the vacant pay assignment.

Vacant Position: This field stores the Position associated with the vacant pay assignment.

Position Dates: This date range represents the set of dates that the pay assignment will be paid over. Note: This date range is not used to determine the pay assignments date ratio and is not used for any other calculations.

Calc Dates: This date range represents the set of dates that the pay assignment will be calculated over. This date range is used to determine the pay assignments date ratio (which is used to prorate the annual salary), thus this date range will affect the calculated annual salary. See the documentation for the PBUPEM DT Ratio field for more information.

Position FTE: This field represents the FTE associated with the pay assignment. If duplicate, generic positions are to be assigned, then the FTE field can be entered with a value greater than 1.

Total FTE: This field stores the employee's total FTE. This is equivalent to the FTE that would be entered in the Base HR EMPMSTR2 screen.

Schedule Type: This field indicates the type of schedule associated with the entered salary index.

Period Type: This field indicates the type of period associated with the pay assignment. Examples are M - monthly, S - Semi-monthly, B -Bi-weekly, etc. If the pay assignment is assigned a salary index with an AXP of P, then this field will be used to determine a multiplier to annualize the PCSALTBL per period amount.

M - multiplier of 12

S - multiplier of 24

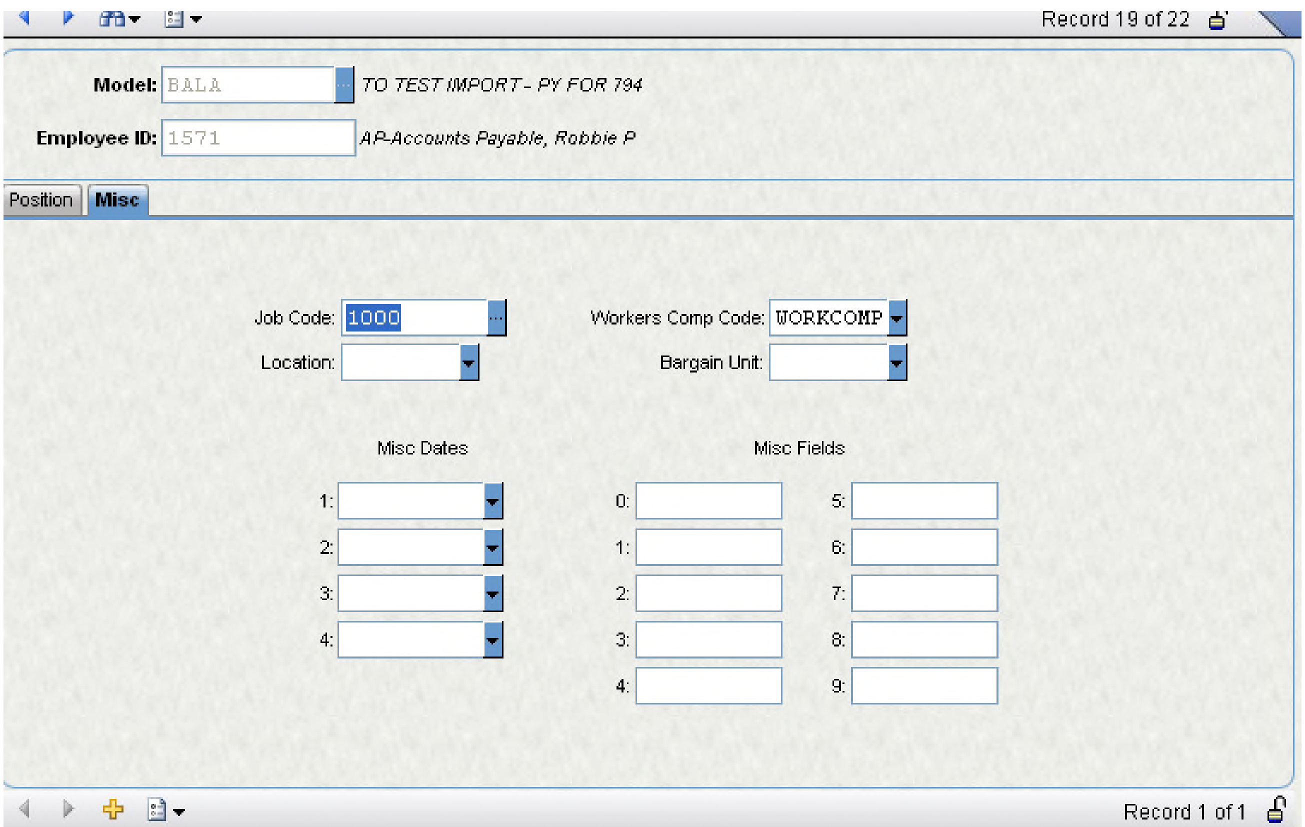
B - multiplier of 26

W - multiplier of 52

Calendar: This field stores the calendar associated with the vacant pay assignment. If the assignment is assigned a salary index that has an AXP of H or D, then the paid days calculated for the Calendar will be used in the calculation of the annual salary.

Override days: Set this field to "Y" if the calculated number of paid days is to be overridden.

Default Days/Years: This field stores the number of paid days for the displayed calendar and Calc date range. It is used in the salary calculation for pay assignments with salary index amounts that have an AXP of "H" or "D".



Field Descriptions

Job Code: This field stores the job code associated with the PCN/Position.

Workers Comp Code: This field displays the worker's comp code associated with the displayed Job code. The value in the field is used to determine the correct worker's comp rate from the PBWRKCMP screen. If this field is blank then worker's comp will not be calculated for the pay assignment.

Location: This field stores the location code associated with the PCN/Position.

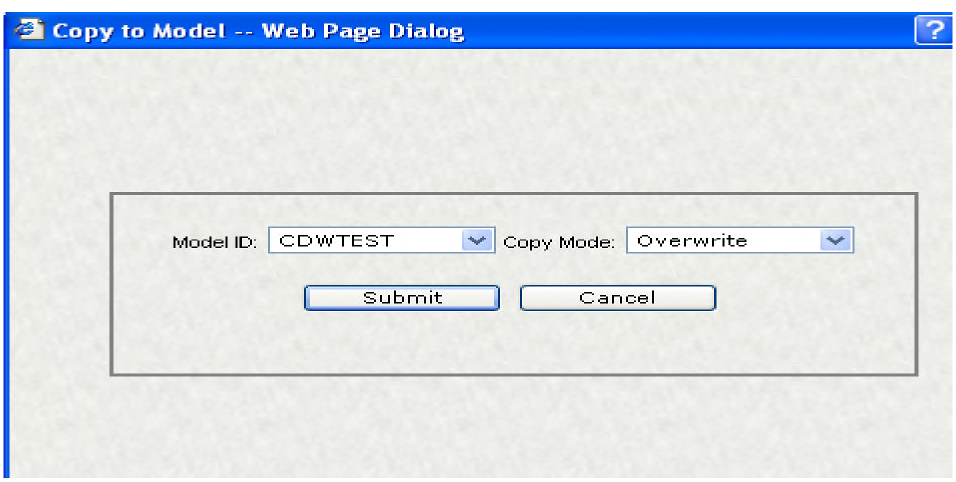
Bargain Unit: This field stores the bargaining unit associated with the PCN/Position.

Misc Dates 1-4: The Misc Dates 1 & 2 fields are used to store employee specific, or in the case of a vacant pay assignment, PCN/Position specific dates that can be used as selection criteria by the pay assignment utilities.

Misc Fields 0-9: These miscellaneous fields are designed to be used as selection criteria fields when running pay assignment utilities. They may be populated with any desired data.

TOOLS:

Copy to Model Tool:



The tool is specific to the current record. A pop-up window appears where a Model can be selected from the drop down.

This tool is used to copy the special postings from one model to another. By selecting the destination Model and submitting will copy the special postings of current Model to the selected Model. User also a option to either overwrite or append to the records of target model.

Insert to PB tool:

This field is used to insert the vacant position records into the Employee Pay table for a particular model. Once it is clicked, the vacant position records will be inserted into Employee Pay table. The records written to Employee Pay table will have the "Vacant" field set to Y. Prior to the inserts, all existing records in Employee Pay table with a Y in the Vacant field will be deleted for the model being processed.

Select Statement Storage: PBUPSS

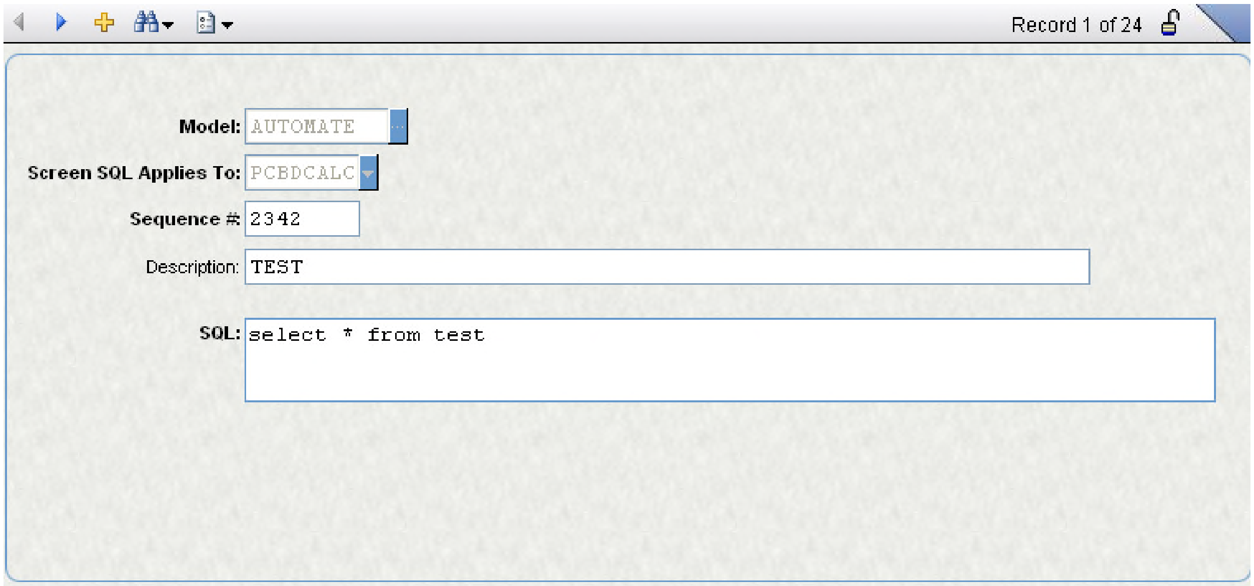
The PBUPSS screen is used to store user defined "where clauses" for commonly used or complex SQL statements. These user defined where clauses are added to the system created "select statement' when running PB utilities. For example, when running the Apply Step Increase utility (mask TDPBUTAI), the system created select statement for model DEMO would be:

select * from pcpaytbl,pcemptbl where pcpaytbl.model_id = 'DEMO' and pcemptbl.model_id = 'DEMO' and pcpaytbl.emp_id = pcemptbl.emp_id and length(sal_index) > 0

If PBUPSS sequence (Seq#) BENEFTE was chosen, then the user modified select statement would be:

select * from pcpaytbl,pcemptbl where pcpaytbl.model_id = 'DEMO' and pcemptbl.model_id = 'DEMO' and pcpaytbl.emp_id = pcemptbl.emp_id and length(sal_index) > 0 and pcpaytbl.emp_id in (select emp_id from pcbencod where model_id = 'DEMO' and bene_fte = 1)

By storing commonly used and/or complex user defined where clause additions, the running of the PB utilities is made significantly easier.Users do not need to know anything about SQL, they simply choose from one of the pre-defined options and the SQL is built for them.



Field Descriptions

Model: This field stores the Model ID.

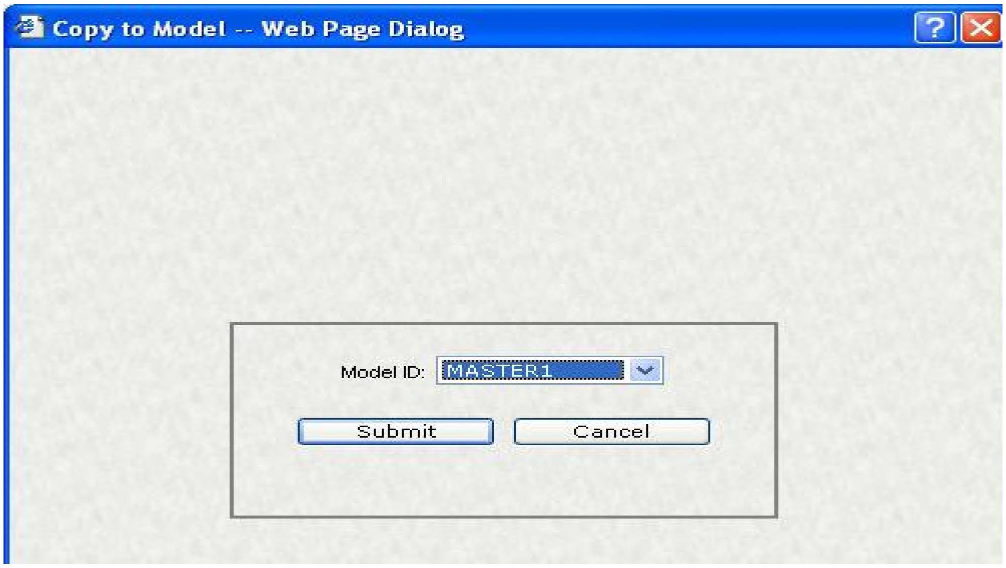
Screen: This field is used to identify which PB screen the entered SQL is going to affect. For example, any entered SQL that is going to be used with one of the pay assignment utilities should have a Screen of PBUPEM. The reason for the Screen identifier is that different screens have different column names. If an SQL was entered that referenced the PB Benefits BENE_FTE column and then that SQL was added to a pay assignment utility, then the SQL statement would generate an error. Possible values for this field are PCPAYTBL (for pay assignment utilities), PCBENCOD (for benefit utilities), PCSALTBL (for salary table utilities), and PCBDCALC (for calculation results utilities).

Sequence# and Description: These fields are used to identify a sequence number and description for the entered SQLs. The sequence number may contain letters and/or numbers. The description should be detailed enough to assist the user when running the utilities. Note: The user, when running the PB utilities, can view the description field. Thus, entering detailed descriptions is very helpful.

SQL: Enter any commonly used and/or complex SQL where clauses. When referencing columns, the exact column name must be used.

TOOL:

Copy to Model:

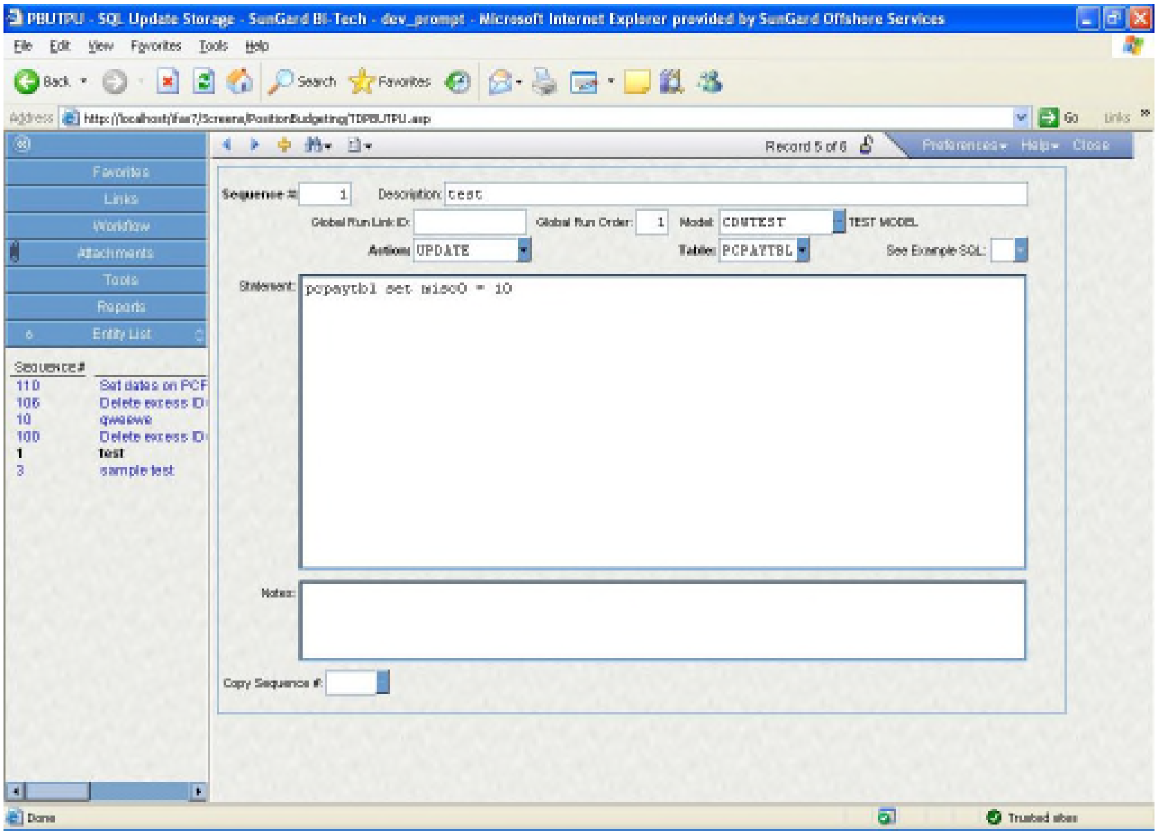


The tool is specific to the current record. A pop-up window appears where a Model can be selected from the drop down.

This tool is used to copy the select statement from one model to another. By selecting the destination Model and submitting will copy the select statement of current Model to the selected Model.

SQL Update Storage: PBTBPU

The PBUTPU screen is used to store any required data manipulation SQL statements required to perform accurate budgeting. The PBUTPU screen is a "catch-all" screen used to perform updates or deletes not otherwise accommodated by the PB system. This screen may or may not be used. It depends on client data manipulation needs. Note that there is not a Model ID field on this screen. The PBUTPU SQLs are model independent.



Field Descriptions

Sequence#: Enter a unique integer sequence number value.

Description: Enter detailed description. The description may be viewed when running the PBUTPU utility, thus a detailed description is very helpful in choosing the correct sequence.

Global Run Link ID: This field is used to group sequence numbers together for global processing. Sequence numbers that are to be run one after the other can be given the same Global Run Link ID value and be run consecutively by the "Run PBUTPU SQL" utility. If this field is left blank, then the sequence may only be run individually. Note: If a code of POSTIMPORT is entered for any SQLs, then those SQLs will automatically be run after the import program has finished. If a code of PRECDHOVRD is entered for any SQLs, then those SQLs will automatically be run just before the PBTBSTIS override records are processed. If a code of POSTCALC is entered for any SQLs, then those SQLs will automatically be run after the calculation program has finished.

Global Run Order: This numeric field indicates the order in which sequences set up to run globally shall be processed. The lower the number the higher the precedence. E.g. number 1 will run first, number 2 second, etc.

Model: Enter the Model ID.

Action: Choose the SQL Action. Have two values:

DELETE FROM: Delete from a PB table.

UPDATE : Update a PB table.

Table: Choose the PB table to affect.

See Example SQL: Shows base or Example SQLs.

Statement: Enter the desired SQL update or delete statement. The entered SQL will be checked for validity when saving the record unless multiple SQL statements are entered for the same sequence number.

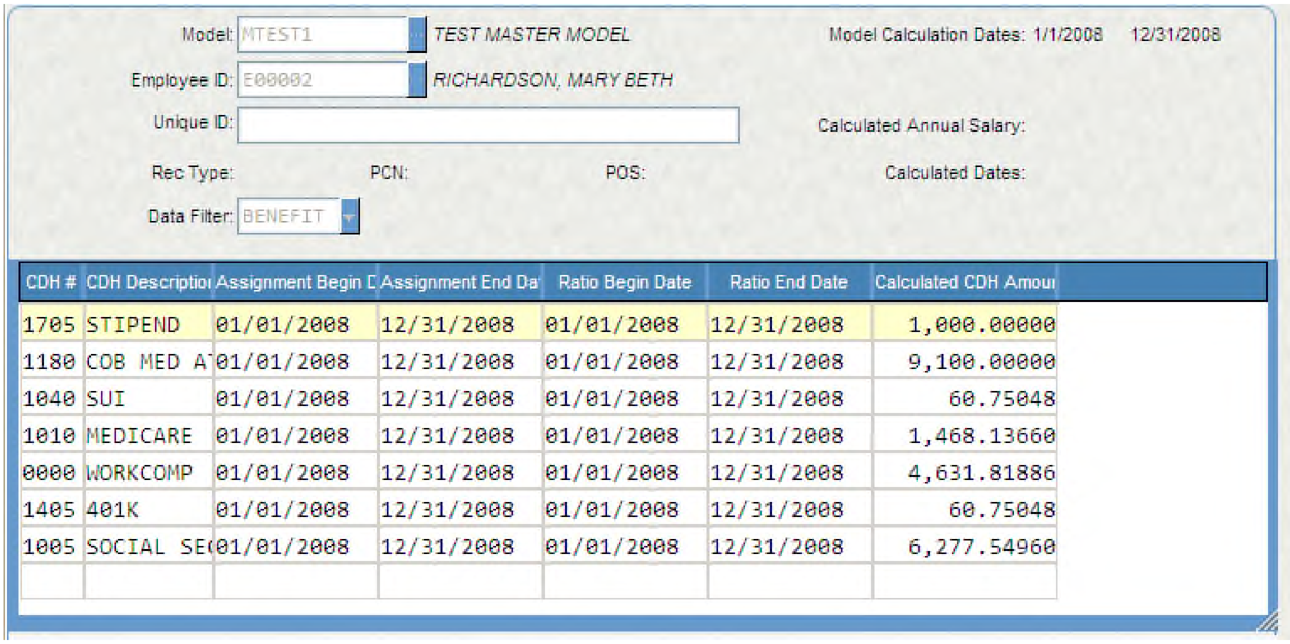
Notes: Enter any desired notes about the entered PBUTPU record.

Copy Sequence#: Select the Sequence number to Copy.

CDH Calculated Amounts: PBUPCA

The PBUPCA screen displays the calculated amount of each CDH at the pay assignment level. This screen is similar to the PBGLUPCR screen, but instead of storing the calculation results at the key/object level, they are stored at the pay assignment level. Thus, it is easy to see for each pay assignment, the calculated amount of each CDH. Two types of records exist on this screen differentiated by the "Data Filter" field. Records with a Data Filter value of BENEFIT are actual benefits that will be included in the calculated budget. Only CDHs set up on the PBSTIS screen with a Data ID of ADDLCDHS will be written to the PBUPCA screen with a Data Filter value of ADDLCDH. Those

ADDLCDH amounts are then used by percent benefits to calculate the CDH inflated amount for each pay assignment. See the documentation for the PBSTIS screen ADDLCDHS section for more information on how ADDLCDHS are calculated. This data is not used by the PB reports or by the GL budget file program. It is for viewing purposes only. This screen is populated by the calculation program and does not allow edits.



Model: MTEST1 TEST MASTER MODEL

Model Calculation Dates: 1/1/2008 12/31/2008

Employee ID: E00002 RICHARDSON, MARY BETH

Unique ID:

Calculated Annual Salary:

Rec Type: PCN: POS:

Calculated Dates:

Data Filter: BENEFIT

CDH #	CDH Descriptio	Assignment Begin D	Assignment End Da	Ratio Begin Date	Ratio End Date	Calculated CDH Amou
1705	STIPEND	01/01/2008	12/31/2008	01/01/2008	12/31/2008	1,000.00000
1180	COB MED A	01/01/2008	12/31/2008	01/01/2008	12/31/2008	9,100.00000
1040	SUI	01/01/2008	12/31/2008	01/01/2008	12/31/2008	60.75048
1010	MEDICARE	01/01/2008	12/31/2008	01/01/2008	12/31/2008	1,468.13660
0000	WORKCOMP	01/01/2008	12/31/2008	01/01/2008	12/31/2008	4,631.81886
1405	401K	01/01/2008	12/31/2008	01/01/2008	12/31/2008	60.75048
1005	SOCIAL SE	01/01/2008	12/31/2008	01/01/2008	12/31/2008	6,277.54960

Field Descriptions

Model: This field stores the Model ID.

Model Calculation Dates: The two dates displayed after the Model Description represent the dates that will were used as the model calculation dates. They are on PBCDHAMT strictly as informational fields.

Employee ID: This field displays the employee ID.

Unique ID: This field displays the unique ID of the pay assignment. It is used as a selection criteria field for displaying data to the Calc'd Annual Salary, RT, PCN, Pos, and Calc Dates echo fields.

Calculated Annual Salary: This echo field displays the calculated annual salary for the pay assignment associated with the displayed UID.

Rec Type: This echo field displays the record type for the pay assignment associated with the displayed UID.

PCN: This echo field displays the PCN for the pay assignment associated with the displayed UID.

POS: This echo field displays the position for the pay assignment associated with the displayed UID.

Calculated Dates: This field displays the calculation dates for the pay assignment associated with the displayed UID.

Data Filter: This field will contain either BENEFIT, for actual benefits included in the budget, and ADDLCDH, for ADDLCDHS set up on PBIMPSPT.

CDH #: This field displays the CDH.

CDH Description: This field displays the CDH description.

CDH Assignment Dates: These fields display the actual PCBENCOD date range for the CDH.

Calculated Ratio Dates: These dates display the CDH ratio dates as determined by the Model date range, the pay assignment date range, and the actual benefit date range. This date range will contain the maximum begin date of the three listed date ranges and the minimum end date of the three listed date ranges. This date range is used to determine a ratio value that is used to prorate the annualized benefit amount.

Calculated CDH Amount: This field displays the actual calculated amount for the CDH that was calculated for the displayed pay assignment.

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Calculate the Model

PBUPCE - Calculate Estimated Budget

Calculate the model to attain the current budget amounts.

The next step is to calculate the data for the imported model. The mask PBUPCE will calculate a model. After entering the mask, you will

be prompted for a model ID. Enter the model to be calculated and the system will then calculate the model.

Once the PBUPCE utility runs for a given model, each employee within the model from the PBUPEM screen goes through a calculation process based on pay/benefits information and ultimately ends up on the PBGLCR screen. Navigate to PBGLCR. Once the screen loads, put the screen in find mode and search for a given model and employee id that you are familiar with.

The calculation process produces results based on employee information within PB. The specific fields are Fringe, Salary, and Budget. These fields were previously not calculated correctly before this bug was fixed. These fields are calculated based on the following information:

Salary is pulled directly from PBTBSL based on the Salary Index assigned to an employee on the PBUPEM screen. It is then annualized based on PBSTRQ's Setup Global Data – System Setup tab Period Type (B in this case) and the dates specified on the Create Model Definition tab (2005 fiscal year in this case). This model/employee setup will cause the annualized amount to calculate the salary over an entire year. Note that salary will usually be blank on benefits that are inserted into PBGLCR during the calculation process. The budget amount will usually be the same as the salary amount when salaries are calculated and inserted into PBGLCR during the calculation.

Fringe can be one of two amounts depending on the benefit being a percentage or flat amount. This is distinguished on the PBUPEM screen's Benefits tab. When an amount is entered, the benefit is considered a flat amount. If the percentage is specified, the benefit is considered a percentage benefit. Note that the Fringe amount will usually be the Budget Amount as well.

Flat Amount

Fringe = annualized amount of the “Amount” specified on PBUPEM’s Benefits tab. The annualized amount is specific to how the benefit’s AXP value instructs the software to calculate. In the case where the AXP value is P thus the amount will be annualized by multiplying the amount by the number of periods. The number of periods is specified by the model’s Period Type of B on PBSTRQ’s Setup Global Data – System Setup tab. Thus, for a benefit with a flat amount of $275 this will be $275 x 26 = $7150

Percentage

Fringe = (salary from PBUPEM’s Pay Assignment tab linked to the pay table by Salary Index) + PBUPEM’s Pay Assignments – Position tab’s additional benefits amount) * (the Percentage from PBUPEM’s Benefits tab / 100) * number of years between the Begin/End dates of the model (from PBSTRQ).

So for an annual Salary of $62,722.92 the Social Security benefit would be:

($62,722.92) * (0.062) = $3,888.82

Copy the model

PBMDCP - Copy To/From Model

Copy the model to another model prior to performing any data manipulations.

The next step is to copy the model to another model prior to performing any data manipulations. This is simply for the sake of performance. If the data manipulations performed on a model do not provide the desired results and the process must be re-started, then without a copy of the original imported model, the full import would have to be run again. The performance difference is that it is much faster to copy a model than it is to perform a full import into a model. This is due to the deletes that must occur prior to importing data into a model and due to the manipulations that occur while the data is being imported. To copy one model to another, the Copy To/From Model utility (mask PBMDCP) must be run. This utility is used to copy the PB data from one model to another. Two copy modes exist, Copy the entire model, and Just copy the model definition screens. If the copy entire model is chosen, then the entire source model will be copied to the destination model with a few exceptions. The copy function prompts you with options to copy or not copy Select Statement Storage, CDH Vectoring, Import Support, Vacant Positions and calculation result information. These screens can also be copied to other models at the screen level.

Two additional copy options exist, Append and Overwrite. If the Overwrite option is chosen, then all data in the screens being copied to will be deleted (for the destination model) prior to the copy. If the Append option is chosen, then the model being copied to will not have any data deleted prior to the copy. With the Append option, the user can decide which tables will have data appended to them. Before data is copied, the system prompts for whether each table should be copied.

Manipulate the Imported Data

PBUT - Position Budgeting Utilities

Modify the imported data with the provided utilities and calculate the model until the desired budget is created.

The next step in the PB process is to manipulate the data as desired and calculate the model until the desired budget is attained. Several utilities are included with the PB system to facilitate these manipulations. The utility names and descriptions are listed below.

Adjust Calculation Results

Adjust Pay/Bene Begin/End Dates

Apply Step Increases

Adjust Salary Begin/End Dates

PB to BID Interface

Create Budget Adjustment

Copy To/From Model

Calc Pay Assgn Ratio FTEs/Hrs

Delete Benefits

Delete Calculation Results

Delete Model ID and Data

Calculate Employee Hours

Flat File Import

Flat File Export

Fix Pay Assignment Sal Dates

Delete Data w/o Valid Model

Increase/Decrease Flat Amounts

Increase/Decrease/Add Benefits

Increment All Dates for Model

Adjust Ratio Percents

Increase Salary Tables

Low Resource Delete

Merge Calculation Results

Match Pay Assgns to Sal Tables

Print Model Info

Set Post To Code on PCBENCOD

Run PBUPDATE SQL

Re-calc PCPAYTBL Addl Benes

Reset Calc Flag to Y

Recalc PCPAYTBL Paid Days

Spread Additional Dollars

Adjust Calculation Results: This utility is used to increase/decrease the calculated results of a model (e.g. the records stored in the PBGLCR screen). The results may be adjusted by up to 100%. Selection criteria may be used to only affect certain records. The adjustment is only made to the calculation screen, thus if the model is re-calculated after running the Adjust Calculation Results utility, then the adjustments made by the utility will be lost.

Adjust Pay/Bene Begin/End Dates: This utility is used to adjust the begin and/or end dates of pay assignment and/or benefits. Dates may be moved forward or backward. Selection criteria may be used to only affect certain records. This utility ties in directly to the date ratio calculated for a pay assignment and benefits. If an imported pay assignment or benefit only partially spans the date range of the model, then it's annual amount will be prorated by the calculated date ratio. If the calculated annual amount should not be prorated, then this utility must be run to "stretch" the dates of the assignment so that they are equal to or greater than the dates of the model. See the description for the PB pay assignment DT Ratio field for more information on the date ratio.

Examples:

Model Begin/End dates for all examples: 07/01/2002 - 06/30/2003

A salary index equivalent to $50,000 per year and an employee PosFTE and TotFTE

of 1.00000 is assumed for all examples.

1) Pay assignment calc begin/end dates: 07/01/2002 - 06/30/2003. Since the dates for the pay assignment and the model are equal, this will create a date ratio of 1. (Date ratio as pertaining to calculations was explained in the

description of PB Pay Assignment). Since the date ratio equals 1 then the full $50,000 will be budgeted for this pay assignment.

2) Pay assignment calc begin/end dates: 07/01/2002 - 12/31/2003. Since the dates for the pay assignment are 6/12 of the model date range, this will create a date ratio of 0.5 (6/12). Thus, $25,000 (50,000 * 0.5) will be budgeted for this pay assignment.

3) Pay assignment calc begin/end dates: 08/01/2002 - 06/30/2003. Since the dates for the pay assignment are 11/12 of the model date range, this will create a date ratio of 0.91667 (11/12). Thus, $45.833.50 (50,000 * 0.91667) will be budgeted for this pay assignment.

Exmple 1 would not require this utility to be run because its date range spans the model's date range, thus the date ratio will be 1. Examples 2 and 3 would require this utility to be run, if those pay assignments are to be budgeted at the full $50,000, because their date ranges do not span the model's date range and will result in a calculated date ratio less than 1.

Apply Step Increases: This utility is used to increment the pay assignment salary index to a higher step on the associated salary table. The user may enter the number of steps to increase with a maximum of 500. The utility has six options regarding the date range of the step increase.

1. Use the existing date range. Choosing this option will increase the step on the affected records without changing dates.

2. Use a new hand entered Begin date. Choosing this option will close the selected records one day prior to the new begin date and insert a new record with a begin date equal to the hand entered date and an end date equal to the end date of the original selected record.
3. Use the Salary Increment Date 1 field. Choosing this option will close the selected records one day prior to the date stored in the PB pay assignment Sal Inc Dtes 1 field and insert a new record with a begin date equal to the date stored in the PB pay assignment Sal Inc Dtes 1 field and an end date equal to the end date of the original selected record.

4. Use the Salary Increment Date 2 field. Choosing this option will close the selected records one day prior to the date stored in the PB pay assignment Sal Inc Dtes 2 field and insert a new record with a begin date equal to the date stored in the PB pay assignment Sal Inc Dtes 2 field and an end date equal to the end date of the original selected record.

5. Use the Misc Date 1 field. Choosing this option will close the selected records one day prior to the date stored in the PB pay assignment Misc Date 1 field and insert a new record with a begin date equal to the date stored in the PB pay assignment Misc Date 1 field and an end date equal to the end date of the original selected record.

6. Use the Misc Date 2 field. Choosing this option will close the selected records one day prior to the date stored in the PB pay assignment Misc Date 2 field and insert a new record with a begin date equal to the date stored in the PB pay assignment Misc Date 2 field and an end date equal to the end date of the original selected record.

See the description of the PB salary table Step Description field for how certain steps may be set up to be skipped when determining the new step.

This utility also has the ability to mark pay assignments that are already at the maximum step. If the user chooses the option to mark pay assignments that are already the maximum step, then that is the only function that the utility will perform (e.g. no step increases will be performed). When this option is chosen, the PB pay assignment field Max Step is set to 'Y' for the appropriate pay assignments. Then, the Increase/Decrease Flat Amounts utility may be run to give a flat amount increase to those pay assignments that are at the maximum step.

Adjust Salary Begin/End Dates: This utility is used to adjust the begin and/or end dates of salary tables. Dates may be moved forward or backward. Selection criteria may be used to only affect certain records.

PB to BID interface: If the new GL budget is not to be created from PB, but rather written to the BID system and merged with its data to create the new GL budget, then run this utility to write the PB calculation results to the BID BDPOSB screen.

Create Budget Adjustment: This utility is used to compare the calculation results of a model against the calculation results of a previous version of the same model, and create a budget that contains the difference between the two. This utility enables a client to run PB several times during the year and only post the changes that occurred from one version of the model to another. If a client is going to use this utility, then after posting a model to the GL, that model should be locked to all users on PBMDLLCK. This will prevent the calculation results in PB from being changed. Thus, when a new budget is compared to the posted budget, the created budget adjustment will be accurate (e.g. The calculation results stored in the PBGLCR table, for the posted model, must exactly match the amounts that were in the posted budget.).

Copy To/From Model: This utility is used to copy all the PB data from one model to another. See the full description in section F of this documentation.

Calc Pay Assgn Ratio FTEs/Hrs : This utility is used to calculate the ratio FTE, ratio Hours, sum FTE, and Sum Hours for PB pay assignments. Normally, this is done by the calculation program, but if it is necessary to have these fields populated prior to running the calculation program (for example if flat amounts need to be prorated by the ratio FTE or Hours fields prior to the calculation) then this utility must be run. How these fields are calculated is displayed below:

1. Calculate Date Ratio. The date ratio is calculated by determining how much of the date range of the pay assignment comprises the date range of the model (MODEL Data Import Dates). Both of the examples below assume a MODEL date range of 07/01/02 - 06/30/03.

Example 1:

The pay assignment has a Calc date range of 10/01/02 - 06/30/03. The date ratio will be .75 because the pay assignment date range comprises ¾ of the model date range.

Example 2:

The pay assignment has a Calc date range of 01/01/03 - 12/31/03. The date ratio will be .50 because the pay assignment date range comprises ½ of the model date range (01/01/03 - 06/30/03). The other six months (07/01/03 - 12/31/03) is ignored by the calculation because it falls outside the date range of the model.

2. Calculate the Ratio FTE. The ratio FTE is calculated by multiplying the Date Ratio by the value in the PB pay assignment FTE field. This value is written to the individual pay assignment.

3. Calculate the Ratio Hours. The ratio Hours is calculated by multiplying the Date Ratio by the value in the PB pay assignment Hours field. This value is written to the individual pay assignment.

4. Calculate the Sum FTE. The sum FTE is calculated by summing all of the ratio FTE values for an employees pay assignments. This value is written to all of the employees pay assignments.

5. Calculate the Sum Hours. The sum hours is calculated by summing all of the ratio Hours values for an employees pay assignments. This value is written to all of the employees pay assignments.

Delete Benefits: This utility is used to delete a benefit from all employees or from a group of employees that meet the users entered selection criteria. This utility will remove the benefit from PB benefits for all affected employees.

Delete Calculation Results: This utility will delete the calculation results from PBGLCR for the entered model. This utility is used in conjunction with the Merge Calculation Results utility. Why it needs to be used will be explained with the Merge Calculation Results utility.

Delete Model ID and Data: This utility is used to completely delete a model from the PB system.

Calculate Employee Hours: This utility is used to calculate a custom amount of hours for a pay assignment. This only affects pay assignments with salary indexes that are attached to salary tables with an AXP of 'H'. Normally, these pay assignments are calculated by multiplying the salary table hourly rate times the imported number of days times the imported number of hours. If this value of days times hours needs to be overridden, then this utility may be used. It prompts the user for two PB pay assignment fields. The values in these fields are multiplied together and the result is written to the PB pay assignment Hours field. The PB pay assignment Days field is set to '1' and the Days Override field is set to 'Y'. The two fields chosen to be multiplied together should be populated with meaningful data via set up on the PB selection criteria screen.

Flat File Import: This utility will import data into a model from flat files created by the Flat File Export utility. If the flat files were modified in EXCEL, and have been transferred to the DATA, or other applicable directory, then this utility will import them into PB with the user entered model ID.

Flat File Export: This utility will extract all data from several of the PB screens and create flat files for each screen. The files are usually stored in the DATA directory, but the clients system setup controls where the files will be stored. The names of the files will be the model ID followed by an underscore, followed by the screen name, followed by .OUT (ex. DEMO_PCPAYTBL.OUT). After the flat files are created, they may be transferred to a local PC and imported into EXCEL for viewing/modifying.

Fix Pay Assignment Sal Dates: This utility should really never have to be run, but it's included as a safeguard. The PB system, like the HR system, allows the user to choose to use either the pay assignments Pay dates or Calc dates when performing salary table lookups. Two non-enterable date fields (Sal Index Lookup Dates) are populated with one of the date ranges (controlled by a field on the PB SETUP screen) by the system when data is imported or if a utility is run that inserts PB pay assignment records. When the model is calculated, these dates are used in conjunction with the salary index to select an amount from PB salary table. If, for whatever reason, these dates get out of sync, then the calculated amounts for the affected pay assignments will not be correct. Running this utility will reset the Sal Index Lookup Dates fields to the correct dates.

Delete Data w/o Valid Model: This utility is used to delete all of the data from the PB system for all models that have been 'orphaned'. This can happen if a user deletes a model definition from the PB MODEL screen without using the delete model utility. The model would be deleted from PB MODEL, but would still reside on all other PB screens. The current version of PB does not allow the user to delete records from PB MODEL.

Increase/Decrease Flat Amounts: This utility will increase/decrease the amount in the Flat Slry field on PB pay assignment. This field is populated via the HR to PB import program for pay assignments that are associated with min/max type salary indexes or that have the salary override flag set to 'Y'. The user has the option to only increase/decrease flat amounts that are already > 0, or to increase/decrease flat amounts that are >= 0. The amount in the Flat Slry field may be increased/decreased by a flat amount or by a percent. The user may affect all pay assignments, or may use selection criteria to only affect specific pay assignments. This utility has the same date options as the Apply Step Increase utility.

Increase/Decrease/Add Benefits: This utility can increase current benefits or add a new benefit to the PCBENCOD screen. The utility may be run on all employees or with selection criteria. If a benefit is to be added, the user may choose from the benefits on PB benefit table. Percent benefits may be increased by an entered percent (e.g. if the user enters an increase of 1% to a 2.5% benefit, then the benefit will be increased to 3.5%). Increases are entered as whole numbers. (e.g. 5% is entered as 5, not 0.05). For Flat amount benefits, the user may choose to only affect amounts already <> 0 or may choose to affect flat amounts <> 0 and flat amounts = 0. Flat amounts may be increased by a flat amount or by a percent. There are six date options with the increase utility, 1) use current dates, and 2) hand enter a new begin date (If a new begin date is entered, the old benefit will be closed one day prior to the new begin date and a new benefit will be inserted into PB benefits), 3-6) use the Date1 - Date 4 fields.

Increment All Dates For Model: This utility is provided for multi-year budgeting. It will increment the dates on PB position table, PB pay assignment, PB benefits, and PB salary table by one year. The user must increment the dates on model by hand. After the adjustments to a model are completed, the model is copied to another model and then this utility would be run on the new model. The user would then change the dates on the model screen to the new desired dates. Since the date range on the model screen doesn't have to be a full fiscal year, the dates are not automatically incremented. After the dates on the model screen have been adjusted, the user may then apply any desired changes to the second year model. This may be repeated as many times as desired.

Adjust Ratio Percents: This utility is used to increase or decrease the value in the Rt% field for a pay assignment. The Rt% field is used as a multiplier for the annual salary. The ratio percent may increased by a flat amount. E.g. if the ratio percent is 1.00000 and it is increased by .1, then the new ratio percent will be 1.10000 and the net effect on the annual salary will be an increase of 10 percent. The same six new date options are available as with the Apply Step Increase utility. The utility may also be run with detailed selection criteria.

Increase Salary Tables: This utility is used to apply flat dollar or percent increases to salary indexes on PB salary table. The utility may be run with selection criteria and the user has two date options. 1) use the current dates, and 2) enter a new begin date. If a new begin date is entered, the old records will be closed one day before the new begin date. If a new begin date is entered, the only those salary tables whose date range spans the new begin date will be affected. If a new date is entered, then any pay assignments attached to the affected salary tables will be closed one day prior to the new begin date and have a new record inserted with a begin date equal to the new begin date. This is because a pay assignment date range cannot span multiple salary index date ranges.

Low Resource Delete: This utility is not included in a standard installation. It is only installed if the Delete Model ID and Data utility have a problem with filling the systems logs and creating a long transaction abort. If this happens, contact the help desk to have this utility installed.

Merge Calculation Results: This utility is used to combine the calculation results of two or more models into a single model to post to the GL. A model to hold the merged calculation results will need to be entered on the model screen. This model will only have an entry in model and, after merging, entries in PBGLCR. Since the model will not have any entries in the table module, the model cannot be calculated or have any of the adjustment utilities run on it. The utility will continuously prompt the user to enter a model to be merged. The user may enter as many models, one at a time, until a D (done) is entered. At that point, the user will be prompted for the model to store the merged calculation results. If the user has entered a model that should not have been merged, then the Delete Calculation Results utility can be run on the merged model. After deleting the merged model, the user may start merging again. Note: all of the desired models that were originally merged, will have to be merged again. The merged model can then be posted to the GL.

Match Pay Assgns To Sal Tables: This utility has been included in the Increase Salary Tables utility and is no longer needed. It will eventually be removed from the system.

Print Model Info: This utility is used to print the a model's set up information on the model definition screen and set up screens. Process import support records - This utility is used to process the import support records independent from the import program. The import support records are always processed during the import process, but if for any reason the import support records need to be processed after the import has been run, then this utility can be run.

Set Post To Code On PB Beneifts: This utility is used to apply the Post To code created on PBTBVC to the appropriate benefits on PB benefits. The utility may be run with selection criteria. This utility must be used for the custom posting strategies setup on PBTBVC to be used.

Run PBUPDATE SQL: This utility is used to run one of the SQL statements entered on the PBUPDATE screen.

Re-calc PB pay assignment Addl Benes: This utility is obsolete and no longer supported.

Reset Calc Flag to Y: This utility is used to manually reset the PB pay assignment Calc Flag field to Y for a user-specified group of pay assignments. Remember, that the Calc Flag field determines which pay assignments will be calculated when a model is calculated. See the documentation for the PB pay assignment Calc Flag field for more information.

Recalc PCPAYTBL Paid Days: This utility is used to re-calculate the PB pay assignment paid Days field. This utility is only needed if one or more pay assignments had a Y in the Days Override field, but were globally reset to N using a PBUPDATE SQL. This scenario can occur if pay assignments with the Days Override field set to Y are attached to a salary index with an AXP of D or H and have a utility run that breaks them into two assignments. The problem is that since the Days Override field is set to Y, both assignments will have the full days amount and will be over budgeted. In that scenario, the PBUPDATE screen should be used to set the Days Override field to N, then run the Recalc PB pay assignment Paid Days utility to set the Days field.

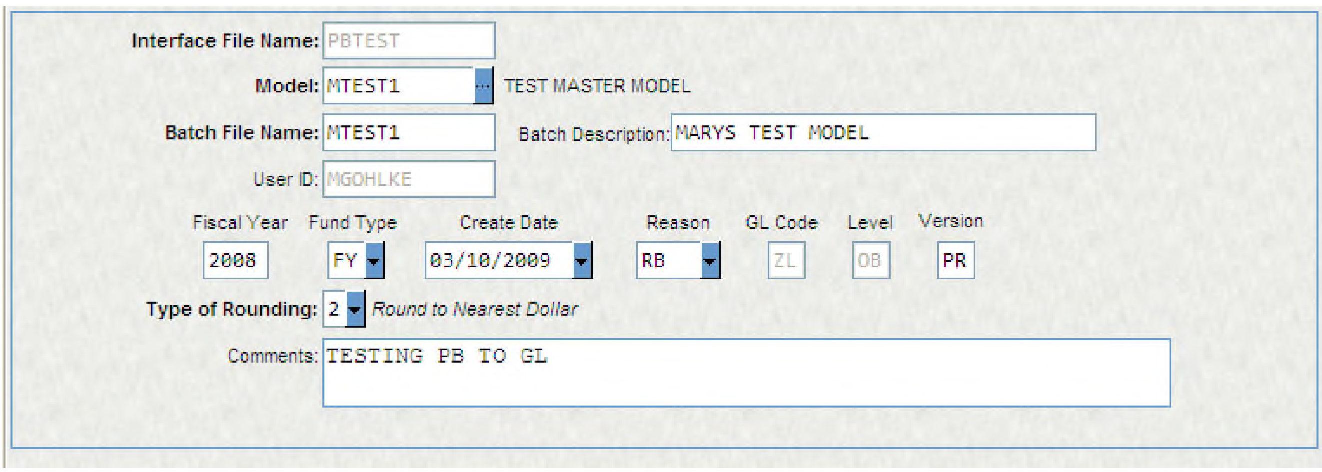
Spread Additional Dollars: This utility is under development and will be included in the documentation at a later date.

Complete the Budget Control Screen

PBGLMB – Make GL Budget

Complete the budget flat-file control screen (PBGLMB)

After all data adjustments have been completed, the next step in the PB process is to complete the PCGLMB screen. This screen controls how certain fields in the budget batch file will be populated and what type, if any, of rounding will be used. This field must be entered before a budget batch file can be created



Interface File Name: This field stores the interface file name. The interface file name, along with the model ID, is used by the budget creation program to select the appropriate GL batch control record for populating certain fields in the budget batch file.

Model ID: Model ID: This field stores the Model ID.

Batch Name: This field specifies the name of the batch file that will be created for the model.

Note: A popular Interface File Name and Batch Name naming convention is to use the model ID for both. Since both the interface and batch name will be prompted for, an easy way to remember the names is to name them the same as the model. One caveat though is that the Batch Name is limited to 8-characters. Thus, if a model name is longer than 8-characters, then another naming convention must be used for the batch name.

User ID: System populated field identifying the name of the user that created the screen.

FY: This field specifies the fiscal year value written to the budget batch.

Fund Type: This field specifies the fund type value written to the budget batch. Validates to the common code BUFT.

Create Date: System populated field indicating the date that the record was created.

Reason: This field identifies the reason for the batch file creation. Validates to the common code BURS.

GL Code: This field specifies the general ledger code written to the batch file. It is populated based on the value in the PB model Ledger field for the entered model ID.

Level: System populated field that identifies the level of budgeting. Currently, only OB is supported.

Version: This field specifies the version of the budget.

Type of Rounding: This field is used to specify what type, if any, of rounding is to be applied to the calculated budget amounts. The available options are

Comments: Enter any desired comments.

Create the GL budget flat-file which can then be disbursed to the GL.
OR
Write the PB calculation results to the Budget Item Detail system (BID) to be written to the GL with the BID data.

If PB is to create the budget batch, then after the budget screen is completed, the mask PBGLBU is used to create the budget batch in the GL. After entering the mask, the user will be prompted for the interface file to use.

If PB is to be interfaced into BID the mask PBUTBD.

Pay Assignment Calculation Rules

Pay assignments are calculated using the following logic:

1) Select the amount and AXP from the PB Salary table record that has the same salary index as the pay assignment and a date range spanning the pay assignment's Sal Index Lookup Dates.

2) Annualize the PB salary table selected amount based on the AXP.

AXP = A; Multiply amount by 1

AXP = M; Multiply amount by 12

AXP = S; Multiply amount by 24

AXP = B; Multiply amount by 26

AXP = W; Multiply amount by 52

AXP = D; Multiply amount by pay assignment's number of days. If the pay assignments Days field is 0 or blank, then the value in the PB SETUP Days/Year field will be used. If that field is 0 or blank, then a default of 260 will be used.

AXP = H; Multiply the amount by the pay assignments number of days and number of hours. If the pay assignment has 0 days or 0 hours, then multiply the amount by the value in the PB set up Hours/Year field. If that field is 0 or blank, then use a default of 2080.

AXP = P; Multiply the amount by the derived periods. The periods are derived based on the PB pay assignment Perd Tp field.

PB pay assignment Perd Tp conversion:

A : Periods = 1
M : Periods = 12
S : Periods = 24
B : Periods = 26
W : Periods = 26

If the PB pay assignment Perd Tp field does not equal one of these values, then a default of 12 is used.

3) Multiply the annualized salary amount by the pay assignments ratio percent (Rt%).

If the pay assignment is attached to a salary index expressed as an hourly or daily amount, then stop processing. Otherwise proceed to step 4.

4) Multiply the amount from Step 3 by the calculated date ratio. The date ratio is calculated by comparing the calculation dates of the pay assignment to the model calculation dates. The date ratio is the ratio of the time frame that the pay assignment's calculation dates overlaps the model's calculation dates. e.g. If the pay assignment's calculation dates encompass ¾ of the model's calculation dates, then the pay assignment will have a date ratio of 0.75.

5) Multiply the amount from step 4 by the PCN FTE.

Percent benefits are calculated using the following logic:

1) Determine the benefit to model ratio dates. These dates are determined by choosing the maximum begin date and the minimum end date from the model calculation dates and the benefit dates. Thus, if the model calculation dates were 01/01/03 - 12/31/03 and the benefit dates were 07/01/02 - 03/31/03, then the benefit to model ratio dates would be 01/01/03 - 03/31/03.

2) For the pay assignment that the percent benefit is being calculated on, determine the pay assignment to model ratio dates. These dates are determined by choosing the maximum begin date and the minimum end date from the model calculation dates and the pay assignment Calc dates. Thus, if the model calculation dates were 01/01/03 - 12/31/03 and the pay assignment Calc dates were 07/01/02 - 06/30/03, then the benefit to model ratio dates would be 01/01/03 - 06/30/03.

3) Determine the benefit to pay assignment date ratio. This is calculated by determining the amount of the dates derived in step 2 that is overlapped by the dates determined in step 1. Thus, for the example above, the benefit dates of 01/01/03 - 03/31/03 (from Step 1) overlap half of the pay assignment dates of 01/01/03 - 06/30/03 (from Step 2). So the benefit to pay assignment date ratio will be 0.5 (approximately).

4) Multiply the pay assignment calculated annual salary by the benefit percent (divided by 100).

5) Multiply the amount from Step 4 by the date ratio from Step 3.

Flat amount benefits are calculated using the following logic:

1) Annualize the benefit by multiplying the amount by the appropriate value based on the benefit AXP.

AXP = A; Multiply amount by 1

AXP = M; Multiply amount by 12

AXP = S; Multiply amount by 24

AXP = B; Multiply amount by 26

AXP = W; Multiply amount by 52

AXP = P; Derive the AXP based on the value in the PBSETUP Period Type field. The values for that field can be A, M, S, B, and W. Thus, for an AXP of P, the multiplier will be 1, 12, 24, 26, or 52.

2) Determine the benefit to model date ratio. This is calculated by determining the amount of the model calculation dates that is overlapped by the benefit dates. Thus, if the benefit dates were 07/01/02 - 06/30/03 and the model calculation dates were 1/01/03 - 12/31/03, then since the benefit dates overlap half of the model calculation dates, then the date ratio would be 0.5.

3) Multiply the amount from Step 1 by the date ratio from Step 2. Thus, if a benefit had an amount of $50 and an AXP of M and the date scenario from Step 2, the calculated benefit amount would be:

$50 * 12 * 0.5 = $300.00

How Benefits are Expensed

For all examples below the model calculation date range will be: 01/01/03 - 12/31/03

Example 1:

$50 flat amount benefit with an AXP of M and a date range of 01/01/03 - 12/31/03.

Pay assignment A with a Calc date range of 01/01/03-12/31/03 and a calculated annusalary of $50,000.

Pay assignment B with a Calc date range of 01/01/03-12/31/03 and a calculated annual salary of $10,000.

The benefit's annualized amount will be $50 * 12 = $600.

The benefit dates to pay assignment date ratio is then calculated and the calculated annual salary is prorated by the date ratio.

Date ratio for the benefit dates to pay assignment A dates = 1.00000
Date ratio * Calculated annual salary = $50,000

Date ratio for the benefit dates to pay assignment B dates = 1.00000
Date ratio * Calculated annual salary = $10,000

Calculated annual salary sum = $60,000

Pay assignment A will receive 50,000/60,000 * 600 = $500

Pay assignment B will receive 10,000/60,000 * 600 = $100

Example 2:

$50 flat amount benefit with an AXP of M and a date range of 01/01/03 - 12/31/03.

Pay assignment A with a Calc date range of 01/01/03-12/31/03 and a calculated annual salary of $50,000.

Pay assignment B with a Calc date range of 01/01/03-06/30/03 and a calculated annual salary of $5,000.

The benefit's annualized amount will be $50 * 12 = $600.

The benefit dates to pay assignment date ratio is then calculated and the calculated annual salary is prorated by the date ratio.

Date ratio for the benefit dates to pay assignment A dates = 1.00000
Date ratio * Calculated annual salary = $50,000

Date ratio for the benefit dates to pay assignment B dates = 0.50000
Date ratio * Calculated annual salary = $2,500

(This is a key difference between example 1 and example 2. Since the benefit is only active for 6 months of the pay assignment B date range, then the flat amount benefit would only be paid to the employee for those 6 months. Thus, the value of the pay assignment is reduced by a value of .5)

Calculated annual salary sum = $52,500

Pay assignment A will receive 50,000/52,500 * 600 = $571.43
Pay assignment B will receive 2,500/52,500 * 600 = $28.57

(Actual amounts may differ by a few to several cents due to date ratio rounding used in the example.)

Things to Remember

1) An employee must have at least one active pay assignment to have their benefits calculated.

2) For a PB vectorying record to be utilized by the calculation program, the value in the PB vectoring Post Code field must be written to the appropriate PB benefits records using the "Set Post To Code On PB benefit" utility.

3) Pay assignments and benefits are prorated based on a date ratio. A date ratio is the ratio of the amount of the model calculation dates that is overlapped by the pay assignment or benefit date range. Thus, any partial year benefits or pay assignments that are to be expensed at a full year amount must have their date ranges "stretched" to equal the model calculation dates using the "Adjust Pay/Bene Begin/End Dtes" utility.

4) If the word DEBUG is entered into any PB pay assignment or PB benefits Misc field, then calculation debug information will be displayed for that record. The debug will be displayed regardless of the value in the PB MODEL Debug field.

5) The PB MODEL Debug field controls what type of debug information is displayed. If model import debug information or calculation debug information is needed, then this field can be used to trigger the display of information. This field is very useful when information on how a pay assignment or benefit is calculated is desired. Note: This field controls the display of debug information at a global level. See point 4 above about individual record level debug.

6) The PB pay assignment "Sal Index" value and "Sal Index Lookup Dates" value must be encompassed by a single record on PB salary table. E.g., the PB pay assignment "Sal Index Lookup Dates" cannot span more than one salary table record on PB salary table. This is the same validation that takes place on the HR pay assignment screens in the HR system.

Section 13: Personal Actions Module

The Personnel Actions module allows for management and officials to make requests for personnel changes online. The request is entered and submitted online and then the electronic workflow process will route the request through the user defined approval hierarchy and business processes. Once the request is fully approved then the option to automatically update the various areas of Human Resources is available to save time and eliminate manual processing for the organization.

The Personnel Actions module provides the ability to configure and customize the screens with an XML File. During implementation SunGard Public Sector will work with clients to assess the various options and have them set up in the XML File. Once the file has been defined we don’t expect many changes will need to be implemented. Clients need to take great care with this XML file and only make changes if they understand the technology. SunGard Public Sector will be available to provide professional services to assist clients with any changes to the file after implementation. Additionally, this file may be overwritten with updates so the file will need to be backed up and changes logged to put back in place after the upgrade.

Features available:

Decentralized personnel action requests

Intuitive and easy to use interface for end users

Audit trail history of personnel changes

User defined approval hierarchy and business processing with Workflow

Ability to add supporting document attachments

Integrated with user security

Ability to request employee salary change with a few clicks and a pull down or field to enter in salary amounts.

Ability to add supplemental payments for an employee.

Ability to update the employee status including FTE and employee type.

Ability to define an employee separation with supporting document attachments.

Comprehensive position change screen with the ability to change position, salary, status, supplemental pay and labor distributions all on one easy to use screen.

Capability to create a brand new employee request within the system including position, salary and supplemental payments.

Automatic update to Employee Master, Pay Assignments, Miscellaneous CDH's

User defined "Reason Codes" allow for an unlimited number of form uses

Validation to allow only one open request per employee per screen

Warning on Position Control for position changes

Salary validations for Step scale, Min/Max ranges

Salary validation override by Reason Code

Standard Reports available

Standard Workflow models available

The Personnel Action module consists of six data entry screens, one for each Action Type. All screens provide a standard header which shows the request number, the action type, reason code and effective date. The screen is driven from the effective date for various reasons including position control validation or pulling in the correct pay assignment and other effective dated information.

Salary Change: This screen allows for an employee salary to be changed for a particular pay assignment selected from the Position drop down. Once the employee is selected then the system will then display their current salary and allow for update of the new salary. The system will validate the salary entered and only allow increases to a proper step on the step scale or within the range for the Min/Mid/Max salaries.

An override feature is available for special circumstances when the salary amount should not be validated within the range or step. A special reason code may be defined and set up in the PA XML File to allow the user to key in any salary amount needed. Workflow can then route this transaction separately for special approval based upon reason code.

Fields:

Action Type: Display only field indicating the Action Type for the screen. Each of the six PA screens will display the applicable action type for the form.

Request Status: Display only field indicating the status of the request. Valid status codes are RQ Requested, IP In Progress, CL Closed, CA Cancelled, RJ Rejected.

Request Number: Display only field indicating the request number. The starting seed value may be defined in the PA XML File.

Effective Date: Enter the effective date for the request transaction. The effective date may be controlled with starting/ending dates as well as a default date of Today, Next Sunday or Next Pay Period begin. Number of days before next pay period begin shifts to the following pay period (ie 3 days before then shift to next period).

Reason Code: Select from the user defined reason code list in the drop down. The reason code listing is defined in the PA XML file and uses the same reason codes as the HR Pay Assignment.

Employee ID: Select the employee ID from the lookup.

Employee Name: Display only employee name.

Pay Assignment: Select the employee position from the drop down. This will apply the requested change to this single position, when applicable.

Position Title: Display only position title related to Pay Assignment.

Division Code: Display only employee division code from Employee Master. May also default from pay assignment with PA XML configuration.

Department Code: Display only employee division code from Employee Master. May also default from pay assignment with PA XML configuration.

Supervisor:

Bargaining Unit: Display only employee master bargaining unit.

Hire Date: Display only employee hire date.

Current Salary: Display only current salary information for the pay assignment selected for this personnel action request. The salary information will display in one of two formats defined for salary schedule code ‘1’ Grade and Step or salary schedule ‘3’ Min/Max. The amount will display in either an Annual or Hourly Amount depending on how the salary table amount is expressed as.

New Salary: Enter the proposed new salary for this personnel action request. The new salary information will be displayed in the same manner as the current salary and will allow changes to the Step or Amount based on the salary schedule code. The system will validate against the step scale and min/max ranges and provide a block if the user tries to exceed. Additionally, a special reason code may be defined in the PA XML File which will open up the amount field and override the salary validation.

Comments: Enter any comments or notes for this request.

Position Change: This screen allows for various changes to the employee pay assignment and employee master information. Once an employee is selected then the user will choose the position they would like to update. A new position may be assigned or else the existing position updated for changes.

If a new position is selected then the salary panel will be updated with the default salary for the position.

Fields:

Action Type: Display only field indicating the Action Type for the screen. Each of the six PA screens will display the applicable action type for the form.

Request Status: Display only field indicating the status of the request. Valid status codes are RQ Requested, IP In Progress, CL Closed, CA Cancelled, RJ Rejected.

Request Number: Display only field indicating the request number. The starting seed value may be defined in the PA XML File.

Effective Date: Enter the effective date for the request transaction. The effective date may be controlled with starting/ending dates as well as a default date of Today, Next Sunday or Next Pay Period begin. Number of days before next pay period begin shifts to the following pay period (ie 3 days before then shift to next period).

Reason Code: Select from the user defined reason code list in the drop down. The reason code listing is defined in the PA XML file and uses the same reason codes as the HR Pay Assignment.

Employee ID: Select the employee ID from the lookup.

Employee Name: Display only employee name.

Pay Assignment: Select the employee position from the drop down. This will apply the requested change to this single position, when applicable.

Position Title: Display only position title related to Pay Assignment.

Division Code: Display only employee division code from Employee Master. May also default from pay assignment with PA XML configuration.

Department Code: Display only employee division code from Employee Master. May also default from pay assignment with PA XML configuration.

Supervisor:

Bargaining Unit: Display only employee master bargaining unit.

Hire Date: Display only employee hire date.

Status Change: This screen provides the ability to update the employee type and position level FTE. The position level FTE will then calculate the employee master FTE.

Fields:

Action Type: Display only field indicating the Action Type for the screen. Each of the six PA screens will display the applicable action type for the form.

Request Status: Display only field indicating the status of the request. Valid status codes are RQ Requested, IP In Progress, CL Closed, CA Cancelled, RJ Rejected.

Request Number: Display only field indicating the request number. The starting seed value may be defined in the PA XML File.

Effective Date: Enter the effective date for the request transaction. The effective date may be controlled with starting/ending dates as well as a default date of Today, Next Sunday or Next Pay Period begin. Number of days before next pay period begin shifts to the following pay period (ie 3 days before then shift to next period).

Reason Code: Select from the user defined reason code list in the drop down. The reason code listing is defined in the PA XML file and uses the same reason codes as the HR Pay Assignment.

Employee ID: Select the employee ID from the lookup.

Employee Name: Display only employee name.

Pay Assignment: Select the employee position from the drop down. This will apply the requested change to this single position, when applicable.

Position Title: Display only position title related to Pay Assignment.

Division Code: Display only employee division code from Employee Master. May also default from pay assignment with PA XML configuration.

Department Code: Display only employee division code from Employee Master. May also default from pay assignment with PA XML configuration.

Supervisor:

Bargaining Unit: Display only employee master bargaining unit.

Hire Date: Display only employee hire date.

Current Employee Type: Display only HR Employee Master Type.

Current Total FTE: Display only HR Employee Master FTE.

Current Assignment – Positions: Display only for each employee position assigned through a pay assignment with the PCN FTE.

New Employee Type: Retain the original or select a new employee type.

New Total FTE: Display only summing the position level FTE allocated in the position FTE grid below.

New Assignment – Positions: The Positions are display only and the user has the ability to change the FTE between the positions shown. If multiple active pay assignments are associated with an employee then multiple records will show in this grid.

Supplemental Pay: This screen allows the ability to assign new and modify existing supplemental payments. This screen reads the supplemental pay from the HRPYCA Misc CDH information tab for the CDH's defined as a list or range in the PA XML File.

Fields:

Action Type: Display only field indicating the Action Type for the screen. Each of the six PA screens will display the applicable action type for the form.

Request Status: Display only field indicating the status of the request. Valid status codes are RQ Requested, IP In Progress, CL Closed, CA Cancelled, RJ Rejected.

Request Number: Display only field indicating the request number. The starting seed value may be defined in the PA XML File.

Effective Date: Enter the effective date for the request transaction. The effective date may be controlled with starting/ending dates as well as a default date of Today, Next Sunday or Next Pay Period begin. Number of days before next pay period begin shifts to the following pay period (ie 3 days before then shift to next period).

Reason Code: Select from the user defined reason code list in the drop down. The reason code listing is defined in the PA XML file and uses the same reason codes as the HR Pay Assignment.

Employee ID: Select the employee ID from the lookup.

Employee Name: Display only employee name.

Pay Assignment: Select the employee position from the drop down. This will apply the requested change to this single position, when applicable.

Position Title: Display only position title related to Pay Assignment.

Division Code: Display only employee division code from Employee Master. May also default from pay assignment with PA XML configuration.

Department Code: Display only employee division code from Employee Master. May also default from pay assignment with PA XML configuration.

Supervisor:

Bargaining Unit: Display only employee master bargaining unit.

Hire Date: Display only employee hire date.

Current Supplemental Pay: Display only fields showing the current CDH's assigned to the employee along with

Separation: This screen allows for the ability to enter a separation of employment request. Upon approval of this record the system may update the Employee Master Termination Tab and run the corresponding Termination Utility.

Fields:

Action Type: Display only field indicating the Action Type for the screen. Each of the six PA screens will display the applicable action type for the form.

Request Status: Display only field indicating the status of the request. Valid status codes are RQ Requested, IP In Progress, CL Closed, CA Cancelled, RJ Rejected.

Request Number: Display only field indicating the request number. The starting seed value may be defined in the PA XML File.

Effective Date: Enter the effective date for the request transaction. The effective date may be controlled with starting/ending dates as well as a default date of Today, Next Sunday or Next Pay Period begin. Number of days before next pay period begin shifts to the following pay period (ie 3 days before then shift to next period).

Reason Code: Select from the user defined reason code list in the drop down. The reason code listing is defined in the PA XML file and uses the same reason codes as the HR Pay Assignment.

Employee ID: Select the employee ID from the lookup.

Employee Name: Display only employee name.

Pay Assignment: Select the employee position from the drop down. This will apply the requested change to this single position, when applicable.

Position Title: Display only position title related to Pay Assignment.

Division Code: Display only employee division code from Employee Master. May also default from pay assignment with PA XML configuration.

Department Code: Display only employee division code from Employee Master. May also default from pay assignment with PA XML configuration.

Supervisor:

Bargaining Unit: Display only employee master bargaining unit.

Hire Date: Display only employee hire date.

New Hire: This screen allows for the ability to hire a new employee and assign their position, salary and supplemental payments.

Fields:

Action Type: Display only field indicating the Action Type for the screen. Each of the six PA screens will display the applicable action type for the form.

Request Status: Display only field indicating the status of the request. Valid status codes are RQ Requested, IP In Progress, CL Closed, CA Cancelled, RJ Rejected.

Request Number: Display only field indicating the request number. The starting seed value may be defined in the PA XML File.

Effective Date: Enter the effective date for the request transaction. The effective date may be controlled with starting/ending dates as well as a default date of Today, Next Sunday or Next Pay Period begin. Number of days before next pay period begin shifts to the following pay period (ie 3 days before then shift to next period).

Reason Code: Select from the user defined reason code list in the drop down. The reason code listing is defined in the PA XML file and uses the same reason codes as the HR Pay Assignment.

Employee ID: Select the employee ID from the lookup.

Employee Name: Display only employee name.

Pay Assignment: Select the employee position from the drop down. This will apply the requested change to this single position, when applicable.

Position Title: Display only position title related to Pay Assignment.

Division Code: Display only employee division code from Employee Master. May also default from pay assignment with PA XML configuration.

Department Code: Display only employee division code from Employee Master. May also default from pay assignment with PA XML configuration.

Supervisor:

Bargaining Unit: Display only employee master bargaining unit.

Hire Date: Display only employee hire date.

Common Code set up:

Optional common codes are included to facilitate whether the workflow models are in training mode and if they should update the system upon final approval. Training mode will allow the user to bypass the required approvals that are set up for testing purposes.

Category: HRPY Value: HRPACC

Description: Sets the Mode for the PAF Position Change Approval Model

Associated Code 1: Update IFAS (Y/N)

Associated Code 2: Training (Y/N)

Category: HRPY Value: HRPANH

Description: Sets the Mode for the PAF New Hire Approval Model

Associated Code 1: Update IFAS (Y/N)

Associated Code 2: Training (Y/N)

Category: HRPY Value: HRPASL

Description: Sets the Mode for the PAF Salary Change Approval Model

Associated Code 1: Update IFAS (Y/N)

Associated Code 2: Training (Y/N)

Category: HRPY Value: HRPASP

Description: Sets the Mode for the PAF Supplemental Pay Approval Model

Associated Code 1: Update IFAS (Y/N)

Associated Code 2: Training (Y/N)

Category: HRPY Value: HRPASR

Description: Sets the Mode for the PAF Separation Approval Model

Associated Code 1: Update IFAS (Y/N)

Associated Code 2: Training (Y/N)

Category: HRPY Value: HRPAST

Description: Sets the Mode for the PAF Status Change Approval Model

Associated Code 1: Update IFAS (Y/N)

Associated Code 2: Training (Y/N)

The following common codes allow for the workflow model to end date the following assignments using the "Termination Utility" available on the employee master when using the PAF Separation screen.

Category: HRPA Value: ENDDTXX (XX = 01-11)

Description: Sets the assignment end date for the type listed in the medium description.

Medium Description: The following list may be used -

HRPayalt.Enddt

HRPayalt.PayEnd

HRPayalt.CalcEnd

HRPayalt.AddlContEnd

HRPayalt.MandDedEnd

HRPayalt.DirDepEnd

HRPayalt.TsaInfoEnd

HRPayalt.BondsEnd

HRPayalt.CdhAssgnEnd

HRPayalt.BeneMstrEnd

HRPayalt.BeneInfoEnd

Associated numeric value 1: Number of days to extend past the PAF form "Effective Date".

PA XML File Options:

SunGard Public Sector will assist clients during implementation with the ability to define the following options within the XML file.

List of Reason Codes for each screen.

Default Effective Date on each screen.

List of override Reason Codes for salary override.

CDH List for Supplemental Pay panel.

Position Change Account Distribution default.

Attachment Definitions list.

Help document/website url.

Hide fields

Re-label fields

Require fields