OnePurdue HR Showcase

Collection of Vacation Balances

Validation of Release 2 Data

Best Practices for Time Entry

June 2007

Presenters:
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Agenda

- Mark your calendar…
- Collection of vacation balances
- HR validation process
- Validation of Cost Distribution Data
- Best practices for initial time entry
- Future showcases
- Questions & answers
Mark Your Calendar...
Mark Your Calendar…

- HR Release 2 go-live is near!
- Collection of vacation balances, release 2 data validation, and the initial time entry cycle are just around the corner.
- Let’s discuss the schedule of events.
Schedule (all WL times)

- **6/8/07 (8 am)**: Entry of vacation balances for non-exempt professional and operations assistant staff may begin.
- **6/11/07 (8 am)**: Data validation of Release 2 data may begin.
- **6/11/07 (8 am)**: CATS open for WIP, attendances only.
- **6/13/07 (noon)**: Data entry of vacation balances for non-exempt professionals & operations assistants ends.
Schedule (all WL times)

- **6/15/07 (5 pm)**: Data validation of Release 2 data ends, all corrections must be submitted.

- **6/18/07 (8 am)**: Data validation of cost distribution and non-exempt quota balances may begin.

- **6/18/07 (8 am)**: CATS system open for time entry.

  *(Note: End of pay period is 6/24/07)*
Schedule (all WL times)

- **6/19/07 (5 pm):** Personnel Actions forms for non-exempt staff (biweekly) due for Pay Period #14

- **6/25/07 (5 pm):** Time entry and cost distribution closes for non-exempt staff.

- **6/26/07 (5 pm):** Final error correction for time entry closes.

- **6/29/07 (8 am):** Data entry of vacation balance for eligible exempt staff may begin.
Schedule (all WL times)

- **7/2/07 (8 am)**: Data validation of Budget Forward conversions may begin.
- **7/5/07 (8 am)**: Reappointment system opens for FY grad appointments.
- **7/6/07 (5 pm)**: Data validation of Budget Forward ends. All corrections must be submitted to Shared Service Ctr/FREH.
- **7/11/07 (noon)**: Data entry of vacation balances ends.
Schedule (all WL times)

- **7/13/07 (5 pm)**: Reappointment system closes for FY grad appointments.

- **7/13/07 (5 pm)**: Personnel Actions forms for exempt staff (monthly) due for Pay Period #7. This includes forms (TBD) for July summer pay.

- **7/16/07 (8 am)**: Validation of exempt vacation balances may begin. Data entry of exception time for exempt staff may begin.
Schedule (all WL times)

- **~7/23/07**: Cost distribution corrections for exempt staff end.
- **8/8/07 (8 am)**: Reappointment system opens for AY Grad/LTL appointments.
- **8/17/07 (5 pm)**: Reappointment system closes for AY Grad/LTL appointments.
Lots of Tasks!

- The next few months will be filled with many, many tasks.
- High levels of stress across the University.
- Let’s stick together and help each other whenever possible.
- In the next few segments of the presentation, we will discuss the June tasks in greater detail.
- Later showcases will focus on tasks in July & August.
Updating Vacation Balances
Updating Vacation Balances
(Non-Exempt Professionals and Operations Assistants)

- **June 8, 2007**: Electronic files will be stored here:
  http://www.purdue.edu/onepurdue/resources/1p_data_collection.shtml

- Users will log in to the site using their career account user ID and passwords.

- Users will open the appropriate spreadsheet (divided into major University divisions).

- Each spreadsheet is shared and allows multiple users to update data simultaneously.
### Sample Spreadsheet

<table>
<thead>
<tr>
<th>Org.unit</th>
<th>Organizational Unit</th>
<th>PUID</th>
<th>Pers No.</th>
<th>Employee Name</th>
<th>Employee Group</th>
<th>Employee Subgroup</th>
<th>Vacation Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>426</td>
<td>President</td>
<td>1111111</td>
<td>2222222</td>
<td>Doe John</td>
<td>Non-exempt Prof</td>
<td>12 Month Nonexempt</td>
<td></td>
</tr>
<tr>
<td>426</td>
<td>President</td>
<td>3333333</td>
<td>4444444</td>
<td>Smith John</td>
<td>Non-exempt Prof</td>
<td>12 Month Nonexempt</td>
<td></td>
</tr>
<tr>
<td>374</td>
<td>Ofc of Vice President for Human Relation</td>
<td>5555555</td>
<td>6666666</td>
<td>Jones John</td>
<td>Operations Asst.</td>
<td>12 Month Nonexempt</td>
<td></td>
</tr>
<tr>
<td>381</td>
<td>Office of Governmental Relations</td>
<td>7777777</td>
<td>8888888</td>
<td>Johnson John</td>
<td>Non-exempt Prof</td>
<td>12 Month Nonexempt</td>
<td></td>
</tr>
<tr>
<td>311</td>
<td>Intercollegiate Athletics Administration</td>
<td>9999999</td>
<td>9999999</td>
<td>Adams John</td>
<td>Non-exempt Prof</td>
<td>12 Month Nonexempt</td>
<td></td>
</tr>
</tbody>
</table>
Hints for Data Entry

- Set a filter to display only the employees in your HR org unit. This will facilitate data entry.

- All vacation balances must be entered in hours.
  - Ex: 44 full days x 8 = 352 hours
  - Ex: 22 half days x 4 = 88 hours

- Enter the hours in the “Vacation Balance” column.

- SAVE the file frequently!
Effective Dates for Balances

- Balances for non-exempt employees should be calculated to June 11, 2007.
- Calculate as follows:
  2. Document any unrecorded usage (actual and planned) between June 1 and June 10, 2007.
  3. Balance 1 minus balance 2 = amount to enter into worksheet.
- Reminder...Enter the balances in HOURS.
Active Employees Only

- Note that only active employees will be listed in the vacation worksheet.
- Inactive employees (on unpaid leave) will not be included in the worksheet.
- Vacation balances will need to be updated at a later time, after unpaid leave is complete.
Concurrent Employees

- Employees that have multiple benefit eligible assignments must have vacation balances updated separately for each assignment.

- Divide the vacation balance to reflect the CUL per assignment.
  - Employee is 50% CUL in Dept A, 50% CUL in Dept B.
  - Total vacation balance is 100 hours for the employee.
  - Update 50 hours on Dept A assignment.
  - Update 50 hours on Dept B assignment.
Missing Employees

- If you have an employee that does not appear in the spreadsheet, you will need to update their vacation balances manually.

- Complete the new Quota Correction Form (URL to be distributed later).

- Form should be submitted to Payroll in Freehafer Hall.
Conversion of Data

- **6/13/07 (noon):** Data entry of vacation balances closes.
- OnePurdue will use the data to prepare a conversion file.
- **6/17/07:** The vacation balances for non-exempt professionals and operation assistants will be loaded into production and available for time entry on 6/18/07.
Updating Quota Balances - Exempt Employees


- Process to update will be the same as previous update cycle for non-exempt professionals and operation assistants.

- Effective date of balances = June 30, 2007, and must be entered in HOURS.

- Balances must be updated by **noon July 11, 2007**.
Release 2

HR Data Validation Process
Data Validation Schedule

- 6/11/07 (8 a.m.): Initial Release 2 conversions are complete for selected HR infotypes.
- Users may begin validating salary and time data.
- Reviewing the converted data is a very important step and will avoid errors in the initial payroll runs!
Data to be Validated in This Phase

- **Salary Data (non-exempt only)**
  - Hourly rate, Period Rate, Annual Salary
  - CUL
  - Pay Scale Level
  - Wage Type

- **Time Data (all employees)**
  - Working Week
  - Work Schedule
  - Time Admin code
  - Shift Code (Add’l Time ID)
Why Non-Exempt Salary First?

- Non-exempts will be paid from the new system in early July at the old fiscal-year rates.
- Exempt employees will not be paid from new system until new budgeted rates are converted.
- Focus on non-exempt employees first.
Process to Validate Data

- Run T-code ZHR_Basic_EE_List
  - Select your HR org unit(s).
  - Select phase 1 validation layout.
  - Export data to Excel if desired.

- Run Brio query titled HR Legacy Data
  - Query will be distributed via email.
  - Limit on your legacy department(s).
  - Process the query.
  - Review report titled “Employee List.”
  - Export data to Excel if desired.
Step 1: Compare All Employees

- Compare the current employees in the Brio query to the active and inactive employees in the SAP query.
- If an employee is current in legacy but missing in SAP, send a PA form to hire or transfer as appropriate.
- If an employee is current in legacy but withdrawn in SAP, process a PA form to rehire the employee in SAP.
Step 2: Compare Salary Data for Non-Exempt ONLY

- Common identifier between legacy and SAP: PUID.

- Compare legacy salary to SAP salary; validate for accuracy.

- Compare legacy FTE to SAP CUL; validate for accuracy.

- Compare legacy position code (4th digit, non-exempt only) to pay scale code in SAP.
Step 3: Validate for ALL Employees

- Review time admin codes, shift codes, work schedules, working week in SAP only.
  - Ensure that all staff have the correct time admin code assigned.
  - Ensure that the work schedule and working week are appropriate for the employee.
  - Ensure that the shift code is accurate for the employee. *Note: Shift codes other than Day will change the hourly rate for non-exempt employees.*
Corrections Process

- A form for miscellaneous corrections is stored here:
  [http://www.purdue.edu/hr/Resources/ps-forms.htm](http://www.purdue.edu/hr/Resources/ps-forms.htm)

- Complete the form with the needed corrections and submit to the Shared Service Center in Freehafer.

- Validation period ends 5 p.m. June 15, 2007.
Budget Forward Conversions

- Salary data for *budgeted employees only* will be reconverted into OnePurdue in late June.
- New salary data will be available for validation July 2, 2007.
- Business areas will need to revalidate all salaries for both exempt and non-exempt employees.
- Details will be announced later.
Conversion of Cost Distribution Data
Conversion of Cost Distribution Data

- **06/15/2007**: Cost distribution data will be converted using the last pay period distribution data stored for the employee.

- **06/18/2007**: Cost Distribution Administrators may begin validating converted cost distribution data for all employees in their area. Known issues include:
  - Work study funds will not convert appropriately due to lack of data in legacy systems.
  - Concurrent employees may have incorrect data due to inappropriate sequencing of records.
  - DREF (SIO) data was converted for Ag, Vet and CFS only.
  - Employees not paid within the past two pay periods will be defaulted to the master cost center and default fund.
  - Overtime charges will cause multiple lines to be created during conversion; will need to eliminate lines as necessary.
Validation Process for Cost Distribution

- A report to validate converted data will be available to Cost Distribution Administrators.
- The report offers various selection criteria and will provide a list of employees and their current cost distribution information.
- T-code = ZHR_COST_DISTRIB
- Data validation and corrections may begin as early as June 18, 2007.
Review of Best Practices: Preparing for Time Entry
Best Practices

- The initial time entry cycle is quickly approaching.
- Business areas should consider a series of best practices for time entry.
Best Practices

- **~ June 4, 2007:** If labels are desired for future time cards, order AVERY labels #5261.

- **~ June 4, 2007:** If desired, order time cards through FREH Operations (max order = 4 pay period supply). Otherwise, use electronic forms stored on Payroll’s Web site.

- **June 11, 2007:** If desired, business areas may print labels to attach to new time cards.

*Note: Cost distribution data will not be available until June 18, 2007.*
Best Practices

- **~June 11, 2007:** Sign up for Time Entry help sessions.
- Help sessions will be held June 23 to June 25, 2007.
- Schedule and sign-up process will be published in the near future. Watch for an e-mail!
Best Practices

- **June 11, 2007**: Time Administrators should test access!

- Run transaction code CAT2.
  - Select employees by Time Administrator Code and/or HR Org Unit.
  - Ensure that all employees appear in the list.

- If questions about security, check the following:
  - ZHR_CATS_Display to identify codes assigned to your position.
  - SU01d to identify roles stored on your position.
Interim Security Process

- If access is incorrect, abbreviated security process will be implemented.
- A Time Administrator role request spreadsheet will be published on the Web (URL to be determined).
- Users will complete the spreadsheet and e-mail to hrsclearing@purdue.edu.
- Access will be set up very quickly when the spreadsheet is submitted.
- Stay tuned for more news on this process.
Missing Employees

- The security for the Time Administrator may be correct, but employees still could be missing from the list.

- Missing employees may have an incorrect time administrator code assigned. Follow corrections process discussed earlier in the presentation to update these employees with the correct code.

- Missing employees may not yet be established in SAP. If necessary, submit an PA form to establish the employee in the system.
Best Practices

- **June 18, 2007**: Cost distribution (all employees) and quota information (non-exempt only) available in SAP for validation.

- **June 18, 2007**: System is available for time data entry.

- **June 18, 2007 or later**: After validating/correcting cost distribution, labels may be reprinted with updated cost distribution information.
Help Desk and Communication Process
Help Desk Process

- **Quota Balance Update**: Contact Gene Farmer (gfarmer@purdue.edu).
- **HR Data Validation**: Contact Sheryl Gick (slg@purdue.edu).
- **Time Entry Best Practices**: Contact Gene Farmer (gfarmer@purdue.edu) or Jane White (jmwhite@purdue.edu).
Communication Process

- Lots of tasks are quickly approaching.
- OnePurdue will distribute e-mails as tasks open and close.
- Please expect to hear from us in the near future.
Future Showcases

- **Late June 2007**: Topics will include Release 2 data validation for budget forward, summer session, and grad/limited-term lecturer reappointment process.

- **Mid-July 2007**: Review of HR Reports

- Further details of showcases will be provided in the near future.
Reminder...

- We will continue to keep both legacy and OnePurdue in sync until June 30, 2007.
- Please continue to submit both payroll changes and personnel action forms until then.
Questions?
Thank You for Participating!