

**SUNGARD
SUMMIT 2010**
Today's Priorities. Tomorrow's Possibilities.

FLAC Implementation – Reality Check


Presented by: Cheri Murphy
Gloria Boone
Old Dominion University
Judy Cushman, SunGard Higher Education
Aaron Guigar, Evisions
April 13, 2010
Session ID 0404

Session Rules of Etiquette

- Please turn off your cell phone/pager
- If you must leave the session early, please do so as discreetly as possible
- Please avoid side conversation during the session

Thank you for your cooperation!


0404



FLAC Implementation – Reality Check

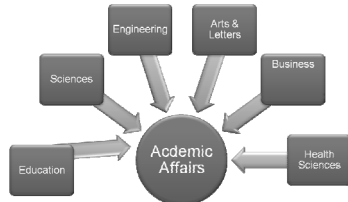
- Life Before FLAC
- Implementation Goals & Strategy
- Challenges & Successes
- Tables
- Benefits
- Payroll Perspective
- Lessons Learned from Parallel Processing
- Additional Features
- Summary

0404



Life Before FLAC

- Paying approximately 800 adjuncts each semester
- Paper & time intensive process
- Deadline was 1 week before the beginning of the semester
- First check received 1 month into the semester



0404

ODU Environment

- 6 Colleges & distance learning environment
- Adjuncts paid by the course
- Adjuncts in pooled positions by department
- Compensation calculated: rate by rank * credit hours
- All paperwork for adjuncts approved by Academic Affairs Office – big log jam
- Copies of paperwork submitted to Payroll and Human Resources

0404

Implementation Goals & Strategy

- Goals:
 - Checks to adjuncts more timely
 - Information to adjuncts about how they are being paid
 - Save Time – reduce redundancy
 - Reduce the paperwork

0404

Implementation Goals & Strategy

- **Strategy**
 - Cross functional team
 - Academic Affairs or Provost's Office
 - Registrar's Office
 - College Representative
 - Payroll & Human Resources
 - Computer Services
 - Get "Buy-in"
 - Pilot Group
 - Only adjunct & overload payments

0404



Challenges

Challenges

- **Retro-fitting our current Banner set-up**
 - **Default Earnings**
 - We had never used default earnings for any earn code except REG
 - Adjunct earn codes would not default into existing jobs
 - Worked for new jobs once we changed the codes to default
 - Began using different job suffix – this is considered a new job
 - **Update PTREARN**
 - Change the attribute of the adjunct earn codes to "RP" regular pay
 - **PTRECLS**
 - Allow default earnings for those employee classes

0404

Challenges

- **Cross Functional Module & Team**
 - No one had the whole picture
 - Working with Student side
 - Working with non-Banner people
- **Lots of pieces to the puzzle**
 - Student schedule side, faculty records, security, self service, table set-up, HR, Payroll
- **Error messages have multiple pieces**
 - “Missing rate type...” error could multiple have causes & therefore solutions (see cheat sheet)
- **Exception situations**
- **Time to Test & Test & Test**

0404

Challenges


- **Approvals**
 - Paper process –signatures from department, dean's office, and Academic Affairs.
 - Our Compromise
 - Department will print the spreadsheet and get the department signature.
 - This spreadsheet goes to the dean's office.
 - Dean reviews & locks records
 - Email to Academic Affairs – Ready for review
 - Review for abnormal payments-not all the detail they had reviewed before

0404

Challenges

- **Job Type – Overload on NBAJOBS**
 - PEPFCAP creates only Primary or Secondary job types on NBAJOBS – will not create Overload jobs
 - Computer Services created a process to run after PEPFCAP that changes Secondary jobs to Overload for FT employees

0404




Successes

Successes & Non-problems

- Uploading to SIAASGN
- Paying our FT faculty their overload payments or our staff and administrative faculty to teach courses

0404



Tables

Table Set-UP

- PTVFLIC & PTRFLIC – related to incremental pay
 - Several Options to start with – ended up with just a few
 - Travel, Distance Learning, Special Skill
- PTVFLCL – faculty levels
 - We already used this concept
- PTRFLCT – each semester
 - Dates for job records
- PTRFLAC –
 - Everything comes together on this rule table
 - Term specific – can be copied

0404

PTRFLAC – Merges data from both sides

Student Side

College

Campus

Schedule Type

Contract Type

HR/Payroll Side

- Faculty Level
- Compensation Rates

0404

Oracle Developer Forms Runtime - Web: Open > PTRFLAC

File Edit Options Block Item Record Query Tools Help

Faculty Load and Compensation Instructional Rules: PTRFLAC: B.O. (PLAC_DB)

Terms: 200920 Spring 2010 College: ED College of Education Copy Rules
Campus: N Grad On Campus Course Contract Type: PT Part Time Contract

Instructional Rules Rate

From Term: 200910 Copy: To Term: 999999

Schedule Type	Base Rate	Calculation Method	Faculty Levels	Excl	User ID	Activity Date
>> 0 LECTURE	.00	Credit Hours	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	VGRANT	27-OCT-2009
0 SEMINAR	.00	Credit Hours	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	VGRANT	27-OCT-2009
0 PRACTICUM/FIELD EXPERIENCE	.00	Credit Hours	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	VGRANT	27-OCT-2009
			<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>		

Faculty Instructional Level Rate

Faculty Level	Level Rate	User ID	Activity Date
AASCL1 ADJUNCT ASST INSTRUCTOR	950.00	VGRANT	27-OCT-2009
AASCP1 ADJUNCT ASSOCIATE PROF	1,100.00	VGRANT	27-OCT-2009
AASPT1 ADJUNCT ASSISTANT PROF	1,850.00	VGRANT	27-OCT-2009
AINET1 ADJUNCT INSTRUCTOR	1,000.00	VGRANT	27-OCT-2009
APROP1 ADJUNCT PROFESSOR	1,150.00	VGRANT	27-OCT-2009

Press F3 or Copy Button to copy forward data from term 200910 to term 200920

Error messages

- Error: Missing rate for this schedule type “?”, “description” for CRN 99999.
 - PTRFLAC doesn't have the correct combination of: Term, College, Campus, schedule type „ Create an entry that matches the course.
- “Missing rule for contract type PT – Part Time Contract
 - Check the campus, schedule type to make sure that there is a rule on PTRFLAC for that combination
 - Check that the contract type is on the PTRFLCT (Faculty Contract Type Control Rules Form)

0404

Error messages

- “Invalid Schedule Type Rate for Faculty Course Compensation”
 - Could mean that the faculty compensation level is not on PTRFLAC as one of the compensation levels for that college, campus and schedule type.

0404



Benefits

Timing Changes
Role Changes

Compare

Before FLAC (5-6 weeks)

- 800 Adjuncts
- AA appoints & creates PPAIDEN
- Departments prepare 5 part form for each faculty
- Chair & Dean sign-off
- AA verifies paper against Banner data

After FLAC (3 weeks)

- 800 Adjuncts
- AA appoints, creates PPAIDEN, PEAFACT & SIAINST
- HR creates PEAEMPL
- Dept updates SIAASGN with Pos# and contract type
- PEPFLAC creates self service environment
- Review by department & deans

0404

Compare

Before FLAC (5-6 weeks)

- AA signs form & distributes to HR, Payroll and back to department
- HR Creates PEAEMPL & NBAJOBS
- Payroll sets up default earnings on NBAJOBS with start & end dates
- Payroll is run

After FLAC (3 weeks)


- Records are locked in self service
- Faculty receive email to view their compensation
- AA Reviews self service
- AA runs PEPFCAP
- Payroll reviews audit reports
- Payroll is run

0404

Roles & Responsibilities

- Table set-up –Academic Affairs with HR support
- SIAASGN – Academic departments
- Processes
 - PEPFLAC - Academic Affairs
 - PEPFCAP - Academic Affairs
 - Creating PEAEMPL records
 - HR
 - PEAFACT & SIAINST
 - Academic Affairs
- Payroll Processing
 - Payroll

0404



Customization

Processes

- **SWPASGN**
 - Updating SIAASGN with contract type, position number and suffix via spreadsheet upload
- **PWPOVSO**
 - Run after PEPFCAP – changes the “job type” to Overload on NBAJOBS as needed

0404

Reports

Payroll

- Report to verify all locked records moved from self service to NBAJOBS
- Report to capture number of pays for each faculty member, amount of pay, start and end dates for each employee, position number, budget code and sub account charged

0404

Lessons Learned from Parallel Processing

0404

Worked for Us!

- Standard rates for adjunct faculty – by rank
- Updating SIAASGN with contract type, position number and suffix via spreadsheet upload
- Involve people who know the processes & can make decisions
- Start with small pilot group
- Keep it simple

0404



Evisions and Banner Document Management Suite

What can Evisions do for FLAC?

- **FormFusion**
 - Document Customization
 - Output Options
 - Print
 - Email
 - BDMS
 - Archive Electronic Copies
 - Ease of use
- **IntelleCheck**
 - Document Customization
 - Output options

0404

FormFusion Document Enhancement

- **Banner Output from GLRLETR**

```
SUNGARD HIGHER EDUCATION
Contractual Agreement Between the "Institution" and the "Instructor"

Arts And Science
Psychology
Fall 2009

ADJ1000000

Marlene Braun
8514 West 8th Avenue
Milwaukie, OR 97135

9023849
mbraun@sct.com

Partial Load Contract
```

0404

FormFusion Document Enhancement

- **Finished Output**

SUNGARD HIGHER EDUCATION	
Contractual Agreement Between the "Institution" and the "Instructor"	
College/Division:	Arts And Science
Department:	Psychology
Term:	Fall 2009
Contract Number:	ADJ1000000
Contract Title:	Partial Load Contract
Contract Description:	Arts And Science
Contract Description:	Psychology
Contract Description:	Fall 2009
Contract Description:	ADJ1000000
Contract Description:	Marlene Braun
Contract Description:	8514 West 8th Avenue
Contract Description:	Milwaukie, OR 97135
Contract Description:	9023849
Contract Description:	mbraun@sct.com
Contract Description:	Partial Load Contract
Total Payment: \$10,000.00	
My signature will attest that I have read and agree to the conditions as stated in this contract.	
Institution Signature:	Date:
Instructor Signature:	Date:
Print Name:	
Print Title:	
Print Address:	
Print City:	
Print State:	
Print Zip:	
Print Phone:	
Print Email:	

0404

FormFusion Document Enhancement

- Configuring the output options

FormDirector Properties

Select a copy and then configure the FormDirectors that will execute for that copy

Choose the copy for which to alter FormDirectors: **Copy 1**

Note: Copies are added and removed in the properties of the special print parameter

Archive | Email | Print | Script (PL/SQL) | Web | RMS |

Execute this Director: ☒ Always ☐ Never ☐ Only if execute for page

Details

Book pages on: Binary format

Copy generated file to: For

Script

File:

File Field:

Print:

Buttons:

FormFusion Document Enhancement

- Configuring the output options

FormDirector Properties

Select a copy and then configure the FormDirectors that will execute for that copy

Choose the copy for which to alter FormDirectors: **Copy 1**

Note: Copies are added and removed in the properties of the special print parameter

Archive | Email | Print | Script (PL/SQL) | Web | RMS |

Execute this Director: ☒ Always ☐ Never ☐ Only if execute for page

Details

To: From:

CC: Reply-To:

BCC: Receipt:

Subject: Pending Contract

Attachment format: PDF (Encrypted)

Filename of Attachment: Contract.pdf

☐ Custom Script

Buttons:

IntelleCheck and FLAC

IntelleCheck and FLAC

This payroll event includes pay for the following courses: BUS 109 049 Fall 2008, BUS 109 040 Fall 2008, BUS 150 040 Fall 2008

George Community College
IntelleCheck and FLAC

Buttons:

George Community College
IntelleCheck and FLAC

Don't reinvent the wheel!

- **Creating the FormFusion Template**
 - Download it from evisions.com COOP
 - Customize it to your school's template
 - Choose the way you would like to deliver it
 - Make contract delivery seamless for your end users
- **Adding to the notes in IntelCheck**
 - Make a request through the Evisions helpdesk for the Cayuga Community College modification to the Notes section of your checks or direct deposit advices

0404



Additional Features and Considerations

Additional Features

- **Luminis Channels**
- **Workflow**
 - Delivered
 - Custom

0404

Considerations

- Team Structure
 - Academic Affairs / Provost Office
 - Human Resources
 - Payroll
 - Information Technology
- Implementation / Testing Plan
 - Dedicated Team Meetings
 - Which College / Campus?
 - Which Department?
 - Which Faculty Members?
- Communication

0404

Considerations

- Banner Forms
 - Who 'owns' the forms?
 - Who can view the forms?
 - Updates to rule and validation forms

0404

Summary

- This was tough !
 - It is well worth it
 - Time savings is significant
- Give yourself plenty of time to test
- Ease of implementation depends to some extent on your current banner set-up & your business practices
- Colleges are asking if there is a module like this for graduate assistants

0404

Questions & Answers

0404

Thank You!

Cheri Murphy cmurphy@odu.edu
Gloria Boone gboone@odu.edu
Judy Cushman jcushman@sungardhe.com
Aaron Guigar aarong@evisions.com

Please complete the online class evaluation form
Session ID 0404

SunGard, the SunGard logo, the Open Digital Campus, Banner, Lumina, and PowerCAMPUS are trademarks or registered trademarks of SunGard Data Systems Inc. or its subsidiaries in the U.S. and other countries. © 2009 SunGard. All rights reserved.

0404
