Managing the Leave Accrual Process

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SunGard Higher Education
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Session ID 1208

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!

Introduction

- **Leaves processing varies dramatically from school to school**
- **Banner leave processing is powerful and most rules can be handled; sometimes with a bit of creativity.**
- **Best practices are a crucial part of setting up leaves**

Leave Processing Topics Include:

- Reviewing the current processes
- Banner Forms and Decision Making
  - —PTRINST
  - —PTVLCAT
  - —PTRLEAV
  - —PTRLCAT
  - —PTREARN
  - —PEALEAV
  - —PEILHIS
  - —PHIACCR
- Best Practice Review

PTRINST

- Institutional Set-up
- Leave by Employee or Leave by Job?
- Take then Accrue or Accrue then Take?
- Proration based on Jobs based on FTE or Appointment Percentage?
- Minimum Leave Day Increment
- Leave Balance Roll Order
  - —Before Usage and Accrual
  - —After Usage and Accrual

PTVLCAT

- Need one for each group of employees that have separate leave rules
  - —Not needed for changes based solely on length of service
- Payroll v Leave Report Indicator
  - —Both process leaves with no problem
  - —Leave processing will not process anything involving dollars
    - No overtime
    - All leaves must allow negative balances
- Days v Hours
  - —Can only use Days with Leave Reporting
  - —People see days – actual processing remains in hours

PTRLEAV

- Name Types of Leaves
- Same Name can be used in Multiple Categories
- Types of Leave here are ones that are going to be tracked
  - Not funeral
  - Definitely Sick and Vacation?
  - Compensation Time?
  - Student hours worked?

PTRLCAT – the Heart of Leave Processing

- Frequency of Accrual
  - Pay Period
  - Once a Year
  - Anniversary
- Base Date
  - Current Hire
  - Adjusted Service Date
  - Original Hire
  - Seniority
- Cut off Day

PTRLCAT – the Heart of Leave Processing

- Bank Frequency
- Roll Dates
  - Will Change Begin Balances
- Accrual Method
- Accrue in Pays

PTRLCAT – the Heart of Leave Processing

- Leave Accrual Schedule
  - As few or as many as needed
  - Always in hours
  - Roll number CANNOT be less than maximum or it will roll only that much
- Priorities
  - As many as needed
  - Can use Leave or Payroll reporting

PTREARN

- Need an earnings code for each type of leave
- Leave Taken
- Leave Earned

PEALEAV

- Begin Balance
  - Changes at Roll
- Accrued
- Taken
- Banked
- Changes made here
  - Comments Available
  - Can go over Maximum

PEILHIS

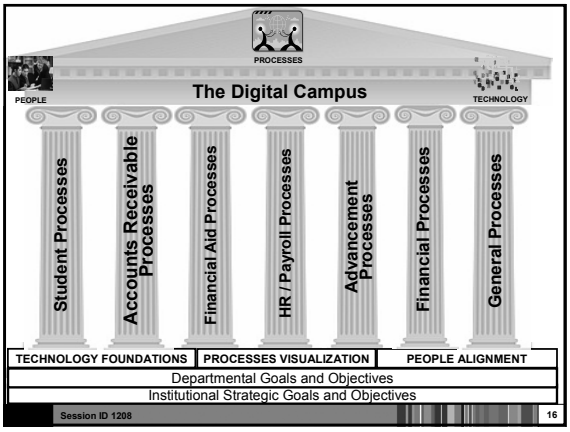
- **PEALEAV History – all data**
- **Includes user and Activity Date**

- **PHIACCR**
  - —**Accrual History by Pay Period**
  - —**Available at Disposition 30**
  - — **Careful in Yearly Accruals**

Summary

- **Very Powerful**
  - —**Can do most (but not all) leave set-ups**
- **Be Creative in use**
- **Analyze for best practices**

Business Process Modeling
Developing Your Ideal State


PROCESSES
PEOPLE
The Digital Campus
TECHNOLOGY
Student Processes
Accounts Receivable Processes
Financial Aid Processes
HR / Payroll Processes
Advancement Processes
Financial Processes
General Processes
TECHNOLOGY FOUNDATIONS
PROCESSES VISUALIZATION
PEOPLE ALIGNMENT
Departmental Goals and Objectives
Institutional Strategic Goals and Objectives
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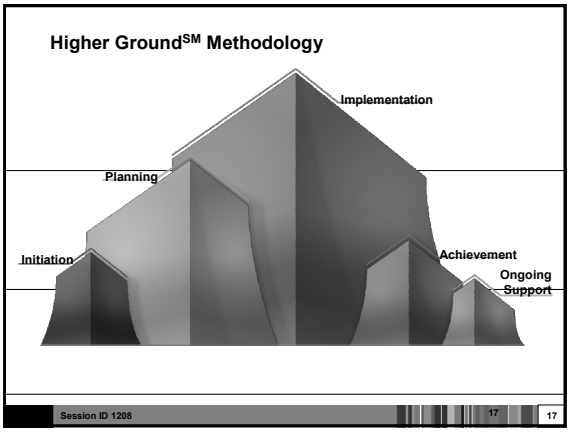
Higher Ground℠ Methodology
Implementation
Planning
Initiation
Achievement
Ongoing Support
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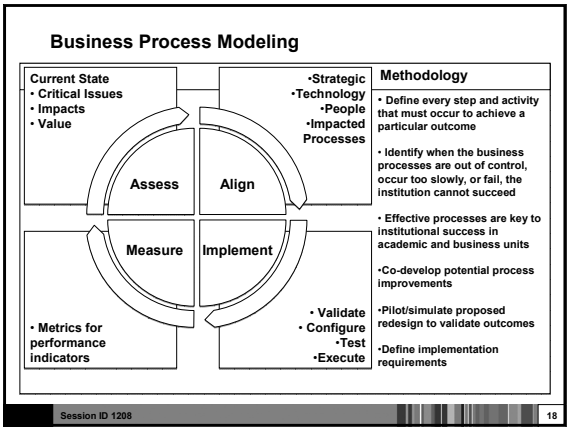
Business Process Modeling
Current State
• Critical Issues
• Impacts
• Value
•Strategic
•Technology
•People
•Impacted Processes
Assess
Align
Measure
Implement
• Metrics for performance indicators
• Validate
• Configure
•Test
•Execute
Methodology
• Define every step and activity that must occur to achieve a particular outcome
• Identify when the business processes are out of control, occur too slowly, or fail, the institution cannot succeed
• Effective processes are key to institutional success in academic and business units
•Co-develop potential process improvements
•Pilot/simulate proposed redesign to validate outcomes
•Define implementation requirements
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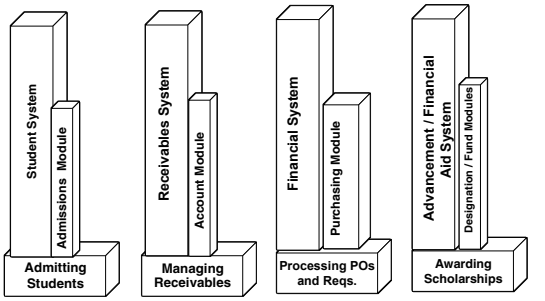
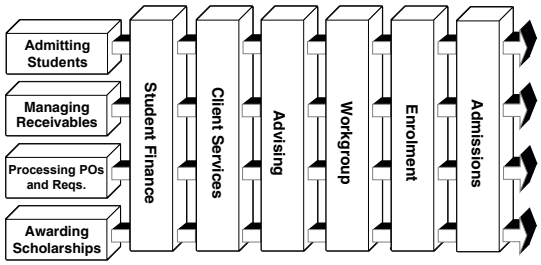
Current State View: Many processes are managed in Silos



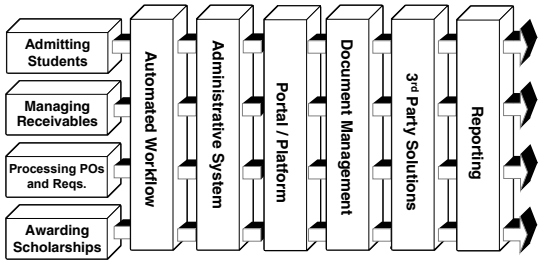
Outcomes of BPM…Cross-Enterprise Processes

Processes operate horizontally – across functional boundaries

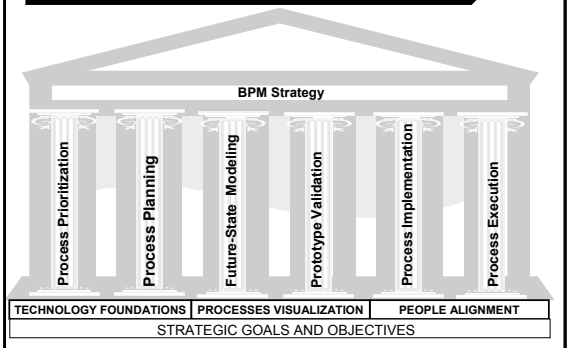


Outcomes of BPM…Cross-Enterprise Processes

Processes operate horizontally – across the UDC

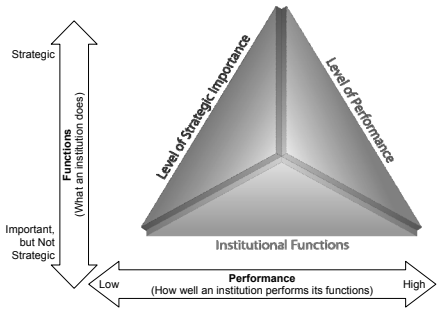


What are the steps involved in a BPM engagement?

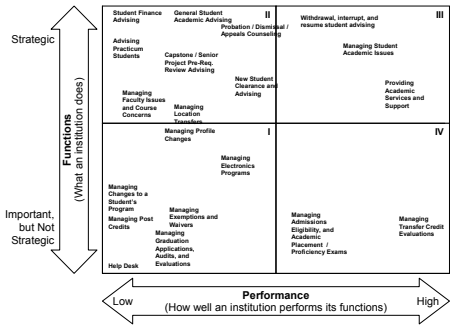


BPM Strategic Frame-working

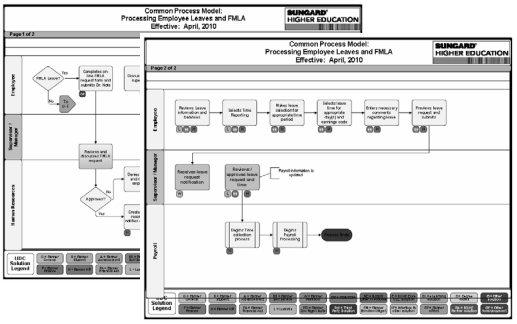
Framework Grid Foundation Definitions



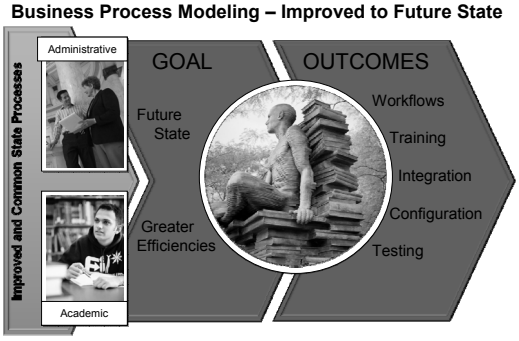
Sample



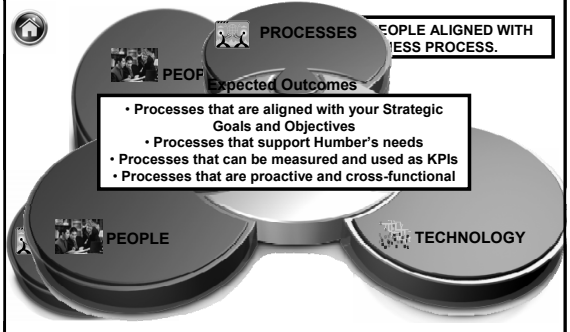
What is a Business Process Model?



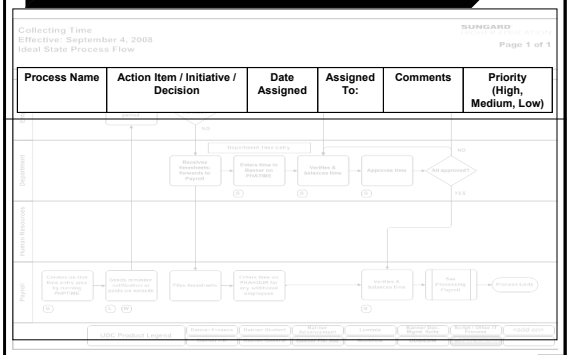
Business Process Modeling – Improved to Future State



Institutional Business Processes – Ideal State



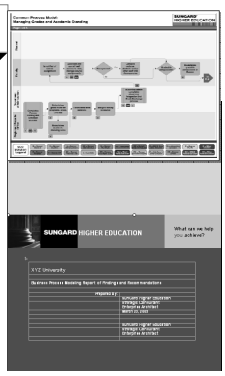
• Initiatives and Action Items



Process Name	Action Item / Initiative / Decision	Date Assigned	Assigned To:	Comments	Priority (High, Medium, Low)

• What are the outcomes and deliverables?

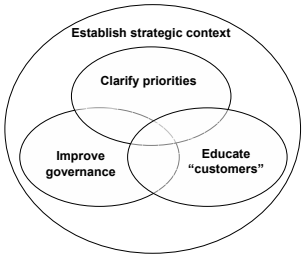
- Findings and Recommendations Executive Report
- Completed Process Outlines
- Specific ideal-state Business process models
- Enterprise Portfolio matrix – from both S&A and BPM



Services & Applications → / Strategic Functions/ Supporting Processes ↓	Portal	Identity Management	Directory Services	Calendar & Events Management	email	Content Management	Document Imaging & Storage	Community	Search	Security	Payment processing	Approvals	Workflow	Information Access	Reporting / Printing	Web Services	Integration	Banner Student	Financial Aid (Home Grown)	Banner HR	Banner Finance	Advancement (Raiser's Edge)	Learning Management (WebCT)	Library System (Innopac)	Bookstore System	Parking System	Smart Card System	Housing/Lecanet Management	Facilities Mgmt (Archibus)	Helpdesk (Incident Monitor)
Governance																														
Operations Optimization																														
Asset Management																														
Human Resource Management																														
Recruit employees	X			X	X	X	X	X	X							X				X									
Hire employees	X	X	X	X	X	X	X	X	X		X	X	X	X	X	X	X			X	X									
Manage employees	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X			X	X				X	X	X		X	X
Monitor benefits	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X			X	X									
Compensate employees	X	X	X	X	X	X	X			X	X	X	X	X	X	X	X			X	X									
Train employees	X	X	X	X	X	X	X	X	X	X		X	X	X	X	X	X	X		X			X	X						
Academic Affairs																														
Curriculum Development	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X	X	X				X							
Create the course catalog	X	X	X	X		X			X	X		X	X	X	X	X	X	X												
Create the schedule of classes	X	X	X	X		X	X		X	X		X	X	X	X	X	X	X					X							
Admissions																														
Recruit students	X			X	X	X		X	X				X	X	X	X	X	X												
Admit students	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X				X	X	X	X			X
Enroll students	X	X	X	X	X	X	X	X	X	X	X	X			X	X	X	X					X	X	X	X		X		X
Assign student accommodations	X	X	X			X				X				X	X		X	X									X			
Student Services																														
Register students	X	X	X	X	X	X	X	X	X	X					X		X	X	X				X	X	X					

Why is this important

- Establishes a plan of action
- Creates ideal state business process models
- Ties people, processes, and technology to educational and business goals
- Provides a common language
- Supports coherent decision-making
- Documents all enterprise applications
- Establishes rules and parameters



Questions & Answers

Thank You!

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