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

Web Time Entry - Soup to Nuts

Presented by: Amanda Riecks-Kurshinsky,
University System of New Hampshire
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Session ID 0124

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

• **In this session we will discuss our rollout of Web Time Entry [WTE] across multiple institutions; how we managed our pilot groups, our setup, and how we've changed our implementation to address user feedback.**

• **In this session you will benefit from learning about…**
   …how we chose to rollout WTE
   …how we are using WTE
   …what we learned from our Pilot Groups
   …what was successful, what was less successful
   …what changes we have made to our business practices and
   …enhancements we have made to WTE

Agenda Slide

- **Managing Pilot Groups**
- **Our WTE Setup**
- **Limiting the Display of WTE Earn Codes by ECLS**
- **VPN Requirement for Approvers and Proxies**
- **Compensatory Time Accrual and Usage**
- **WTE and Default Work Schedules**
- **WTE Survey for Adjunct Hourly and Student Employees**
- **WTE E-mail Notifications**
- **Some 8.x WTE Functionality**

Managing Pilot Groups

How we chose to rollout WTE.

Managing Pilot Groups

- **The University System of New Hampshire includes six institutions:**
  — **Chancellor's / System Offices (2 Locations) [USNH]**
  — **Granite State College (9 Regional & Academic Centers) [GSC]**
  — **Keene State College [KSC]**
  — **Plymouth State University [PSU]**
  — **University of New Hampshire – Durham Campus [UNH]**
  — **University of New Hampshire – Manchester Campus [UNHM]**

- **We worked with the Campus HR and Payroll Offices as well as the USNH Central Payroll Office to decide which groups would be best suited for the pilot.**

- **A Superuser who was familiar with the employees was identified for each group. This person is critical!**

Managing Pilot Groups

- Hands-on training was presented by the Campus HR Office, USNH Central Payroll Office and System Technology for HR [STHR] Office (My office) .

- Change begins at home. We started with USNH hourly employees [Status Hourly, Adjunct Hourly and Student employees] from one of the two USNH locations.
  — Small group of 8 employees

- Over the next two pay periods we moved the remaining USNH hourly employees (50+) to WTE. This included USNH Central Payroll Office and Financial & Administrative System Team [FAST].
  — Establishing the Central Payroll Office helped them see themselves as a resource for employees who had questions since they use WTE for their own time sheets.
  — FAST included the first large group of Adjunct Hourly and Student employees.

Managing Pilot Groups

- PSU Campus HR/Campus Payroll hourly employees moved to WTE (small group of 4).

- In February of 2009 we moved all the GSC hourly employees (100+) to WTE.

- In March of 2009 we moved all of the UNH Interoperability Lab hourly employees (120+) to WTE.

- We continue to move more TS Org groups to WTE.
  —We are considering large volume multiple TS Org rollouts

- We like it!
  —It's timely; It's accurate; WTE Users are paying attention.

Managing Pilot Groups

- What did we learn from our Pilot Groups?
  —Training - Know your audience.
    - Establish two separate training tracks: one for Status Hourly employees and one for Adjunct Hourly and Student employees.

      —Status Hourly employees have more earn codes to manage and need hands-on training.

      —Adjunct Hourly and Student employees use very few earn codes (2 or 3). They navigate intuitively and typically complete their time sheet BEFORE the hands-on training session begins. They gain very little from attending hands-on training.

Managing Pilot Groups

- **What did we learn from our Pilot Groups? (cont'd)**
  - **Remind them it's a Pilot.**
    - **This gives them a sense of ownership and they are more willing to provide feedback (positive and negative) and they have more patience since it is a work-in-progress.**
  - **Change is scary.**
    - **Some of the Superusers who used to have to complete paper time sheets were concerned this would mean more work for them, not less. Those same folks are now champions of WTE.**
  - **There is concern that faculty will not participate.**
    - **So far the faculty we have worked with have been more than willing to approve time sheets in self-service.**
  - **You can not please everyone!**

Managing Pilot Group

- **What did we learn from our Pilot Groups? (cont'd)**
  - **Pick the right people for Approvers/Proxies/Superusers.**
  - **Employees did not like seeing so many earn codes which they would not use.**
    - **We needed to find a way to limit earn codes displayed in WTE without building a new ECLS.**
  - **Our IT department did not like the idea of Approvers, Proxies and Superusers having access to more information than their own [One to Many] via self-service without being behind our VPN.**
    - **A VPN requirement needed to be added.**
  - **We needed a way to track Compensatory Time in Banner.**
    - **Prior to WTE the majority of employees tracked Compensatory Time outside of Banner on spreadsheets.**

Managing Pilot Groups

- **What did we learn from our Pilot Groups? (cont'd)**
  - **Default Work Schedules & WTE don't mix.**
    - **There was confusion about how best to process time sheets for employees who were using vacation or sick time for the entire pay period. We had over payments!**
  - **Adjunct Hourly and Student employees do not require the same in-depth training as Status Hourly employees.**
    - **We needed to customize our training to our users.**
  - **We needed an automated way to send out WTE deadline reminders.**
    - **I built and maintained the WTE e-mail lists and had to send a deadline reminder e-mail message every other Friday no matter where I was in the country!**

Our WTE Setup

How We've Implemented Web Time Entry at USNH

Our WTE Setup

- **For each TS Org we usually have one Superuser who employees, approvers and proxies can contact for assistance.**
  - — Superusers can be assigned at the Campus level (All TS ORGs for GSC) or at the Department level by using PSAORGN (TS Org URRIOL - UNH Interoperability Lab).

- **USNH Central Payroll Office and STHRs staff are Superusers for ALL TS Orgs.**

- **Campus Payroll Office staff are Superusers for all their campuses TS Orgs.**

- **Department Superusers provide support for very few TS Orgs; often only one.**

Setup PTRCALN

- **We tell employees they have until 9:30 AM on Payroll Monday to submit time sheets.**
  - — This gives the Approver all day to work with the employee to get the time sheet approved.

- **We use the Access on the Web Until field on PTRCALN to corral our Approvers.**

- **We tell approvers that they have until 9:00 PM on Payroll Monday to approve time sheets.**
  - — Most Approvers honor this deadline because they have learned that the time sheet is not accessible after 9:00 PM.
  - — Some have learned that time sheets are accessible on Payroll Tuesday and have submitted time sheets in the AM before payroll processing begins (these are processed) or after payroll processing begins (these are not processed).

Update Existing Jobs

- **Add a new Effective Dated record for first day of the pay period to change:**
  - —Time Entry Method to Employee Time Entry Via Web
  - —Time Entry Type to Pay Period Time Sheet
  - —Check off Time In and Out
  - —End any existing Default Work Schedule on the last day of previous pay period

- **Confirm Accrue Leave field is checked on Base Job**

Assign TS Org Approvers

- **Establishing TS Orgs which are only used for WTE is helpful!**

- **An Approver is defined on NTRRQUE**
  - — Once an entire TS Org moves to WTE we usually define the Superuser as the Approver on NTRRQUE.

- **We are using NBAJQUE – Override Approvals Queue**
  - — Remember to wait for payroll processing for the prior pay period to be completed before updating NBAJQUE for employees moving to WTE otherwise the Approver is picked up for PHATIME!
  - — If this is not defined before the employee accesses their time sheet it will default to the Approver defined on NTRRQUE (Superuser).
  - — We do update NBAJQUE with the correct approver information so when the employee submits their time sheet it is routed to the correct approver.
  - — Up until recently, assigning approvers on NBAJQUE had been a centralized process.
    - • We are now giving select Superusers the security required to update this form themselves. This has improved the timeliness of assigning approvers.

Update PEAEMPL and PEALEAV

- **PEAEMPL – Employee Form**
  - —Update Leave Category for those employees who are not already tracking leave in Banner.

- **PEALEAV – Employee Leave Balances**
  - —Assign Leave Balances for those employees who are not already tracking leave in Banner.

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Limiting the Display of Earn Codes in WTE by ECLS

How we reduced the number of earn codes displayed.

Limiting Display of Earn Codes in WTE by ECLS

- **Our users complained of having to see earn codes which they will not use.**

- **We did not want to create a new ECLS so we modified the self-service time sheet page to check a table to determine by ECLS which earn codes to display to WTE employees.**

- **All eligible earn codes for the ECLS as defined on PTRECLS are displayed to Approvers, Proxies and Superusers.**

Limiting Display of Earn Codes in WTE by ECLS

- **Built GZMSDAT - General System Data Maintenance Form**
  - **It was decided the best solution would be to reference another table in order to identify earn codes that should be seen by the users via WTE. This prevents any other baseline functionality from being affected and minimizes the potential for future releases causing problems during upgrades.**
  - **The form is based on FTMSDAT; the corresponding table is GZVSDAT**

- **Modified Baseline Package: bwpktetm**
  - **Modification were made to the ptreernc, ptreernc1, ptreernc2 and ptreernc3 cursors.**

- **ECLS Code/Earn Code data is entered into GZMSDAT [GZVSDAT] to identify the valid earn codes that should be visible via WTE.**

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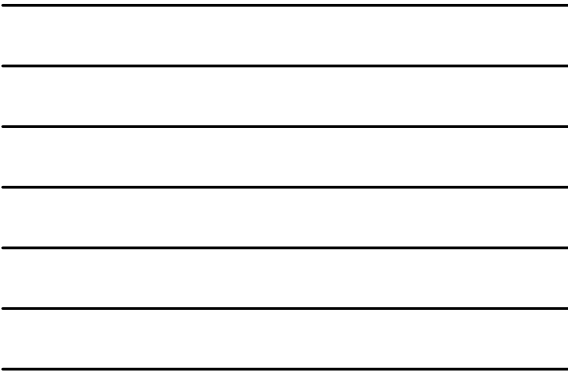*Today's Priorities. Tomorrow's Possibilities.*

WTE and Default Work Schedules

Why we removed Default Work Schedules on WTE Jobs

WTE and Default Work Schedules

- We have always had Default Work Schedules on those jobs coded with Dept Time Entry with Approvals and Pay Period Exception Time Only.

- We do not have In and Out times associated with our Default Work Schedules.

- Trapped WTE Time Sheets: We found that a Superuser could not submit a time sheet on behalf of the employee if the employee only accessed their time sheet and did not enter hours for all the default hours listed.

- We also found that if an employee removed all of their default hours to enter vacation or sick leave for the entire pay period they were over paid [doubled].

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WTE Survey

Survey for Adjunct Hourly Staff and Students

WTE Survey

- **Why a Survey?**

- **An e-mail is sent by the Department Superuser or Approver to new Adjunct Hourly and Student employees instructing them to:**
  - Review on-line WTE training materials.
    - http://www.usnh.edu/banner/training/training.htm
  - Log into Self-Service.
  - Access their Time Entry Survey.
  - Verify their E-mail Address.
  - Verify their Direct Deposit Allocations.

- **WTE Survey is used to confirm Adjunct Hourly Staff and Students understand their responsibilities as WTE employees.**
  - Use Banner Employee Self-Service Survey function.
  - Use Population Selection to define a survey by TS ORG.
  - Monitor survey participation via reporting.

Population Selection Definition Rules Form

Survey Definition

Survey Definition

WTE E-mail Notifications

Automated e-mail notifications for WTE.
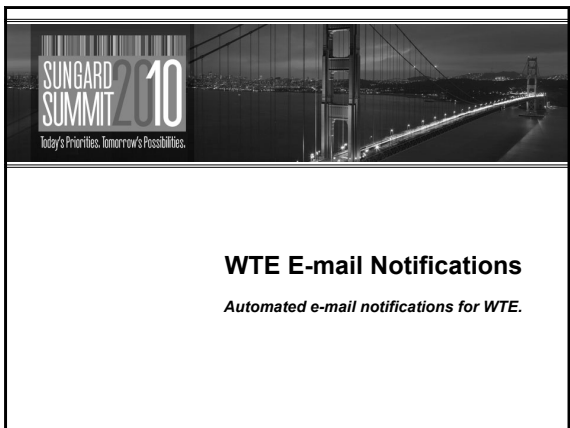
WTE E-mail Notifications

- **USNH Central Payroll Office has implemented automated e‑mail notifications for WTE.**

- **The notification processes use the employee's "Deposit & WTE E‑mail [ACH]" address if defined; otherwise the "Campus E‑Mail [CM]" address is used.**

- **All e‑mails are sent from: Payroll.WTE@usnh.edu**

- **Bounced e-mails are returned to a payroll mailbox.**

- **A report of invalid e-mails is sent to a payroll mailbox when the notification processes run.**

WTE E-mail Notifications

- **PZRWTME - WTE Missing E-mails Notification**
- **PZRWTPN - WTE Pre‑deadline Notification**
- **PZRWTON - WTE Outstanding Notification**
- **PZRWTRN - WTE Return for Correction Notification**
- **PZRWTSN - WTE Special Notice**

PZRWTME – WTE Missing E-mails Report

```
09-Dec-2009 14:12:58     University System of New Hampshire              Page:   1
bprd              --PZRWTME: MISSING WTE EMAILS FROM GOREMAL--   pzrwtme_559744.lis
                                  (2009 B2 24)
ORGN Code/Title                        Name                         ID
-----------------------------------    -----------------------------  ---------
URRIOL Interoperability Lab            Case, Justin                 999999991
09-Dec-2009 14:12:58     University System of New Hampshire              Page:   2
bprd              --PZRWTME: MISSING WTE EMAILS FROM GOREMAL--   pzrwtme_559744.lis
                                  (2009 B2 24)
ORGN Code/Title                        Name                         ID
-----------------------------------    -----------------------------  ---------
YCFS10 AVC Finance Office              Imelda Chekz                 999999992
```

PZRWTME – WTE Missing Approvers

```
*******************************************************************
05-Feb-2010 21:00:09
(BPRD)
PZRWTME
University System of New Hampshire
WTE Missing Emails Report
One up Number: 577015
Year-Pict-No: 2010 B2 3
*******************************************************************
PZRWTME: Loading the PITWTEN table.
424 records inserted into PITWTEN.
*******************************************************************
WTE Employees missing Approver:
ID      PIDM    POSN    SUFF TRORG
9    , 5046455, UNRSTL, 02, UCARTS
9    , 5046589, UNRSTL, 02, URRIOL
9    , 5041782, UNRSTL, 02, URRIOL
9    , 5045083, UNRSTL, 02, URRIOL
9    , 5038892, UNRSTL, 03, URRIOL

PL/SQL procedure successfully completed.
```

PZRWTPN – WTE Pre-deadline Notification

- E‑Mail Subject: WTE Pre‑deadline Notification

- E‑Mail Sent To: Employee, Approver, Proxy
- E‑Mail Frequency: approximately 3 days prior to the entry/approval deadline date

- Purpose: Announces the payroll deadlines for WTE time sheet entry, submission and approval. This will communicate payroll deadlines to WTE users to ensure that hours are processed on a timely basis for work performed within the payroll period. This e-mail will also include any reminders of early entry deadlines due to campus holidays or closings.

PZRWTRN – WTE Return for Correction Notification

- E‑Mail Subject: WTE Return for Correction Notification

- E‑Mail Sent To: Employee
- E‑Mail Frequency: Runs during business hours Monday through Friday and is triggered by any WTE time sheet that is returned for correction. E‑mail is only sent once for the time sheet that has been returned for correction.

- Purpose: Notifies employee when a WTE time sheet has been returned for correction by their approver due to an error or problem. The employee is responsible for taking the necessary action to correct or adjust the WTE time sheet and resubmit it to the approver for approval completion prior to their deadline.

PZRWTON - WTE Outstanding Notification

- E‑Mail Subject: WTE Outstanding Notification

- E‑Mail Sent To: Approver, Proxy

- E‑Mail Frequency: 9:30 am on WTE Monday
- Purpose: Provides the approver and proxy information about any WTE time sheets that are not already approved and action is required. The notice provides a list of employees (with position, time sheet org, number of hours submitted) and identifies the status of each WTE record (not started, in progress, error, return for correction).

PZRWTSN – WTE Special Notice

- E‑Mail Subject: WTE Special Notice

- E‑Mail Sent To: Employee, Approver, Proxy

- E‑Mail Frequency: As needed

- Purpose: Communicate unique or special situations that impact WTE deadlines or functionality. For example, the WTE Special Notice will be used to inform WTE users when curtailed or cancelled operations affect deadlines.

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Some 8.x WTE Functionality

Some 8.x WTE functionality we are looking forward to making available to our users.

8.x WTE Functionality

- **Employee Leave Balance Display**
  — Approvers can view leave balances for employees in queue

- **Improved Sort Order for Pay Periods**
  — Most current pay periods will sort first

- **Job Title Addition**
  — Job Title appears with Position Number for Approvers

- **Approver Viewing Pay Period Limit**
  — Control to limit the number of pay periods an approver can see

- **Multi-Department Approvals by Approver**

- **Insufficient Leave Balance Warning**

- **Employee Re-submit of Time**

Summary

- **Department Superusers are critical to your success.**
- **Pick your Pilot Groups carefully.**
- **Include HR & Payroll in training to answer policy questions as they occur.**
- **Listen to your Pilot Groups to learn.**
- **Adapt and change your business practices if necessary.**
- **Enhance if you can.**

Questions & Answers

- **I'm not a programmer… but I'm happy to answer as many questions as I can.**

Thank You!

Amanda Riecks-Kurshinsky
amanda.riecks-kurshinsky@usnh.edu

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