

# Process Efficiency

## The Smart Choice

Session: 7039



Canada HEUG  
2019  
Conference

# Session Agenda

## So we're "efficient" with your time....

- Introduction and overview
- Time & Labour Auto Enrollment
- Auto Termination
- Exception-Based Time Reporting for Interim (temporary and casual)
- Payroll Reports Auto-save & Nightly Job Sets
- Navigation Collections



# A little more about us

- Alyssa Guarraci- Business Analyst – Human Resource Services, McMaster University
- Nishaan Parbhoo- Senior Business Systems Analyst – University Technology Services, McMaster University
- Dave Hall- Senior Manager, Analytics, Payroll and System Strategy– Human Resource Services, McMaster University



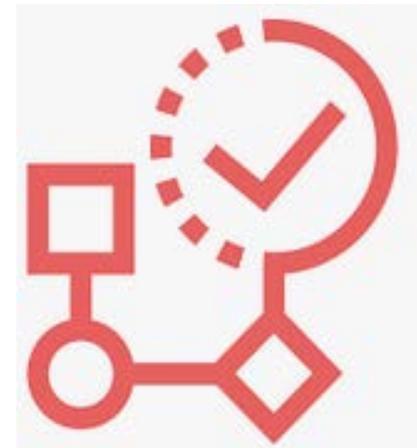
# Alliance 2019 Presentation

McMaster University is a large research-intensive University, with over 16,000 employees paid annually, and 11 bargaining units, 1 Faculty Association and 1 Management Group representing these employees. Using PeopleSoft 9.2.23 Human Capital Management and PeopleTools 8.56, McMaster processes two biweekly payrolls, on alternating weeks for Faculty and Staff. This presentation will highlight the complexities of the Institution, and how streamlining system processes and administrative tasks can lead to fulfilling strategic objectives.



# Auto Termination

- The process checks all Job records for the End Job Automatically check box and then compares the date entered to the Expected Job End Date.
  - If the date is less than or equal to the “as of date” selected the process will add a termination row on Job Data effective the End Date plus one day as per normal termination process.
- This update was packaged with the Automatic Time and Labour Enrollment process in order for Time Reporter Data to be inactivated automatically following a process run.
  - The T&L Auto Enrollment will also run and set the Time Reporter to Inactive as of 21 days from Termination to account for the last pay to be processed.
- You cannot save the Job Data record with the End Job Automatically checked but there is no Expected Job End Date.
  - You can still save a record with an End Date but no check on End Job Automatically.
- We have seen a significant decrease in our overpayments, and processing time for terminations



- **Navigation**

- Human Resources > Workforce Administration > Job Information > Temporary Assignments > Reactivate/Update Termination

## Reactivate/Update Termination

Run Control ID ag

Report Manager Process Monitor

Run

### Process Request Parameters

Company   McMaster University

As Of Date  

Work Location ?

Find First 2 of 3 Last

\*Effective Date 04/29/2019

Go To Row + -

Effective Sequence 0

\*Action Data Change

HR Status Active

Reason New Contract

Payroll Status Active

\*Job Indicator Primary Job

History

Position Number 00110274

Office Assistant I

Override Position Data

Position Entry Date 09/04/2018

Position Management Record

Regulatory Region CAN

Canada

Company MAC

McMaster University

Business Unit MAC01

McMaster University

Department 10507

HRSC Operations

Department Entry Date 09/04/2018

Location 31-202

CAMPUS SERVICES BLDG. 202

Establishment ID

Date Created 04/30/2019

Last Start Date 09/04/2018

Expected Job End Date 08/30/2019

End Job Automatically

Job Data

Employment Data

Earnings Distribution

Benefits Program Participation

McMaster Specific

\*Effective Date 08/31/2019

Go To Row + -

Effective Sequence 0

\*Action Termination

HR Status Inactive

Reason End of Contract (Auto Term)

Payroll Status Terminated

\*Job Indicator Primary Job

Current

Position Number 00110274

Office Assistant I

Override Position Data

Position Entry Date 09/04/2018

Position Management Record

Regulatory Region CAN Canada

Company MAC McMaster University

Business Unit MAC01 McMaster University

Department 10507 HRSC Operations

Department Entry Date 09/04/2018

Location 31-202 CAMPUS SERVICES BLDG. 202

Establishment ID

Date Created 09/09/2019

Last Start Date 09/04/2018

Termination Date 08/30/2019

Expected Job End Date

End Job Automatically

Override Last Date Worked

Last Date Worked 08/30/2019



# Auto Termination

- Below is a sample of the steps :
  1. Check "End Job Automatically" on Job Data Record with an existing Contract End Date
  2. Save Job Data
    1. Navigate to the Reactivate/Update Termination page
  3. Enter Run Control ID
  4. Company - MAC
  5. As Of Date will pull any contract end dates  $\leq$  this date with check on
  6. Run Process
- Once the process runs to success, a Job Data row reflects the new Effective Date 1 day after Contract End Date. The action is Action "(TER) Termination" and the reason is "(CND) Contract End Date". The action and reason are coded into the process and will need to be activated. The label on the reason can be changed to anything that would better suit the process.
- McMaster has the "HR\_REACTVTER" process run on a scheduled recurrence every Saturday. The process will insert a Termination/Contract End Date row on job data for any employees who have a contract end date that is less than or equal to that Saturday
- A script can be used to turn the End Job Automatically check on in order to process retroactive cleanup.



# Time & Labour Auto Enrollment

Auto enrollment is a framework that is used to automate the Time and Labor enrollments.

- We leveraged this functionality to assign the workgroups to employees
- Workgroups at McMaster generally map 1-1 to Union group.
- This is the main criteria used to identify which workgroup is assigned to an employee
- Auto enrollment can be setup to run real-time as changes are made to Job Data
- Using a fluid pivot grid, we can manage any errors that arise if the process was unable to assign a workgroup
- The process also enables automatic inactivation of time reporters termination
- We have configured inactive status on time reporter data to be 21 days past the termination date to allow user to access the timesheets in the final pay or for off-cycles. load and error information. The frequency of time reporter data changes can be real-time or scheduled in a batch process based on the configurable option chosen.

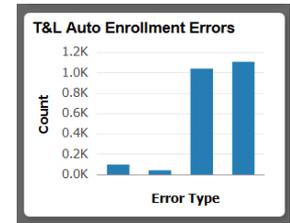


# Time & Labour Auto Enrollment

- However, with auto-enrollment process, when an employee terminates and time reporter status is inactive a manual step is still required to set the TA Status to 'Not Up For Processing' to ensure they are not continually picked up by TL\_TIMEADMIN after their inactivation on time reporter data
- This limitation leads to rendering auto-term/auto-enrollment an incomplete automated end-to-end process
- We have a high volume of hires, re-hires and terminations at specific times of the year
  - For our fiscal 2019:
    - Hires Processed: 7,750
    - Rehires Processed: 6,653
    - Terminations Processed: 13,038
- In order to facilitate a fully automated solution we built a custom process that runs nightly prior to TL\_TIMEADMIN to flip the TA Status to Not Up For processing for any employee whose time reporter data is inactive as of the sysdate
- As a safeguard we also added a step in this custom process to ensure exception hourly employees who are active on time reporter data have a status of Up for Processing (if the current status is 'Not up for Processing')



# T&L Auto Enrollment Errors



**Error Type**

- Validation Issues (1110)
- Retro Errors (1043)
- Job Deletion (100)
- Not Eligible (44)

**Employee Type**

- Hourly (1700)
- Exception Hourly (378)
- Salaried (219)

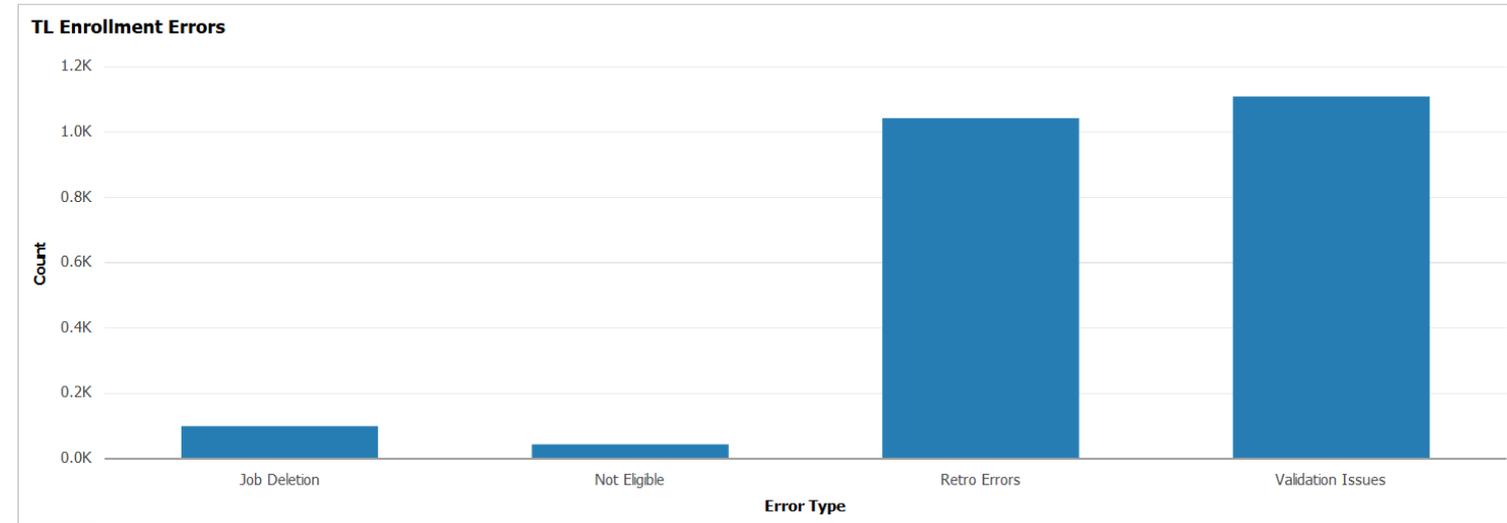
**Union Code**

- ESA (1652)
- UF1 (264)
- MFF (113)
- CP1 (79)

[More](#)

Rows: Error Type

Columns: Count



ID	Actions	Empl Record	Effective Date	Effective Sequence	Name	Jobcode	Employee Type	Department	Location	Union Code	Error Type	Error Open Since
[REDACTED]		1	01/01/2017	0	[REDACTED]	TEMPORARY/CASUAL/TRANSITIONAL	Hourly	Psychiatry	HEALTH SCIENCES CENTRE 3G53	ESA	Retro Errors	2018-03-09-11.30.04.00
[REDACTED]		0	04/18/2015	0	[REDACTED]	TEMPORARY/CASUAL/TRANSITIONAL	Hourly	Associate Dean Academic	ENGINEERING BLDG. A214	ESA	Retro Errors	2018-03-09-13.21.01.00

# Exception-Based Time Reporting for Interim Employees with Set Schedules

## Reminder of Time Reporter Definitions:

- Hourly – requires positive time entry and approval for all hours worked (either with or without a schedule)
- Exception Hourly – scheduled hours are automatically approved and paid; only exceptions to schedule need reporting and approval (requires a schedule)

## Business Process Change Overview

- Interim employees can be set up as “exception hourly”
  - Therefore no longer require time entry or approval for their pay to process.
  - Only exceptions to their scheduled hours (i.e. unpaid time) would need to be entered and approved by the department
  - Recommend set-up for full duration of the contract
- Any change to their scheduled hours will need to be addressed to avoid under/overpayments



# Payroll Reports Auto Save & Nightly Job Sets

McMaster University runs a payroll for our Faculty & Staff groups weekly. In order to ensure accuracy, the Payroll Team, runs approximately 120 payroll reports, and approximately 30 payroll processes each week

Previously, this team was pulling each report and running each process manually

We decided to make our payroll processing more efficient by batching most of our payroll reports and processes into job sets. Depending on the day of the week, these job sets run nightly, and during the day

In addition to our payroll reports, we also moved all our third-party remittance queries (20 per week) to a job set, so they can be run automatically after pay confirm

By doing so, we allowed our payroll processing to become more efficient, as the processing time per payroll was significantly decreased

# Reports Auto Save & Nightly Job Sets

Staff			
	Day 1 (Monday)	Day 2 (Tuesday)	Day 3 (Wednesday)
<b>Overnight Jobset</b>	HRSCHD1 -Pay Report: PAYRPT1A	HRSCHD2S -Absence Calc: SAMCALCA -Pay Report: REPORT2S--> PAYRPT2A and ABGENSAM	HRSCHD3 -Pay Report: PAYRPT3A
<b>Noon</b>	PAYRPT1B	PYRPT2BS-> PAYRPT2B and ABGENSPM	After pay confirm: Request REMITSAM
<b>3:00 PM</b>	N/A	BTUNEUPW - Pay Report : PAYRPT2C	
Faculty			
	Day 1 (Monday)	Day 2 (Tuesday)	Day 3 (Wednesday)
<b>Overnight Jobset</b>	HRSCHD1 -Pay Report: PAYRPT1A	HRSCHD2F -Absence Calc: FAMCALCA -Pay Report: REPORT2F--> PAYRPT2A and ABGENFAM	HRSCHD3 -Pay Report: PAYRPT3A
<b>Noon</b>	PAYRPT1B	PYRPT2BS-> PAYRPT2B and ABGENFPM	After pay Confirm: Request REMITFAM
<b>3:00 PM</b>	N/A	BTUNEUPW - Pay Report : PAYRPT2C	

# Example of a Nightly Job Set

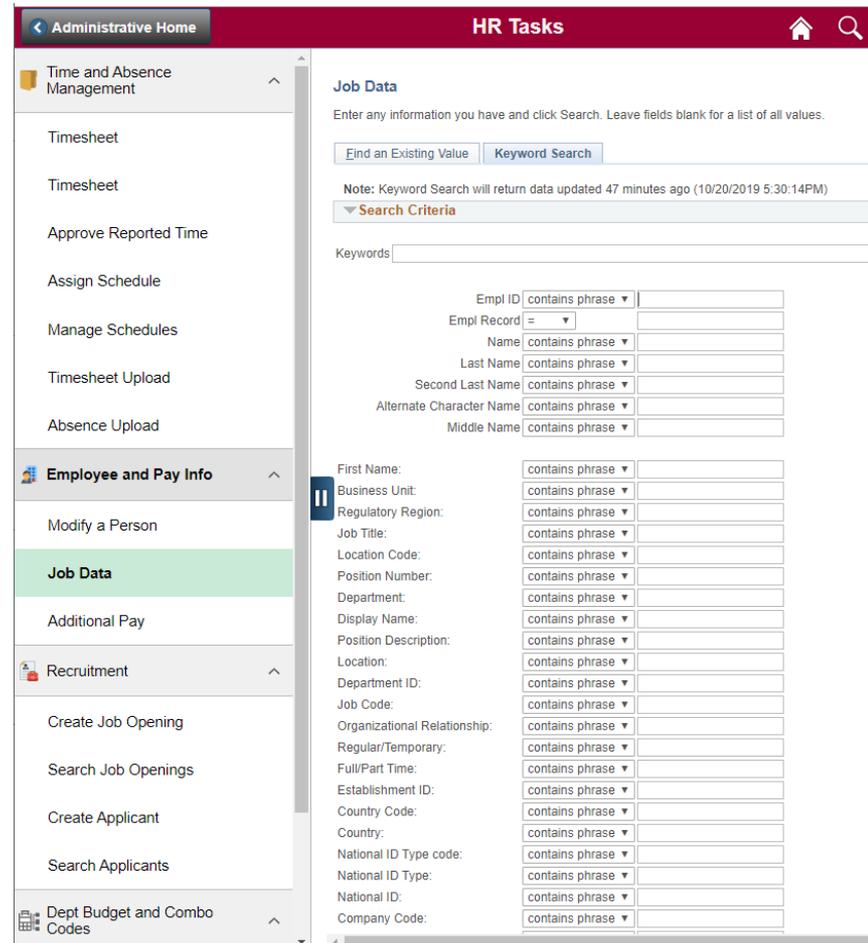
- 1030902 - HRSCHD2S No Success
- 1030903 - HRTRIG No Success
- 1030905 - MCBN100D No Success
- 1030904 - HRTRIG2S Warning
- 1030906 - SAMCALCA Success
- 1030918 - GP\_PAYE Success
- 1030907 - PAYROLLD Warning
- 1030919 - MCM\_TLPRCAON Success
- 1030920 - MCM\_ADS\_EX Warning
- 1030921 - MCM\_ADS\_EX Warning
- 1030922 - PSPPYRUN Success
- 1030923 - PSPPYRUN Success
- 1030924 - MCM\_EIPRDUPD Success
- 1030925 - MCM\_TLPRCAOF Success
- 1030908 - REPORT2S Success
- 1030926 - ABGENSAM Success
- 1030927 - PAYRPT2A Success

- 1030927 - PAYRPT2A Success
- 1030934 - PAY010 Success
- 1030935 - MCMFY007 Success
- 1030936 - PAY008 Success
- 1030937 - MCM\_PYTL\_ERR Success
- 1030938 - MCM\_DDAU\_RPT Success
- 1030939 - MCM\_011\_JOB Success
- 1030940 - MCM\_PAY011 Success
- 1030941 - PSQUERY Success
- 1030942 - PSQUERY Success
- 1030943 - PSQUERY Success
- 1030944 - PSQUERY Success
- 1030945 - PSQUERY Success
- 1030946 - PSQUERY Success
- 1030947 - PSQUERY Success
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- 1030959 - PSQUERY Success
- 1030960 - PSQUERY Success
- 1030961 - PSQUERY Success
- 1030962 - MCM\_PY\_REPT Success

# Navigation Collections – Efficient Access



- Ease of access for users
- Consolidates most commonly used pages in one place (based on user input)
- Access is based on existing security roles
- Solves the user complaint of loss of navigation breadcrumbs with Tools 8.55

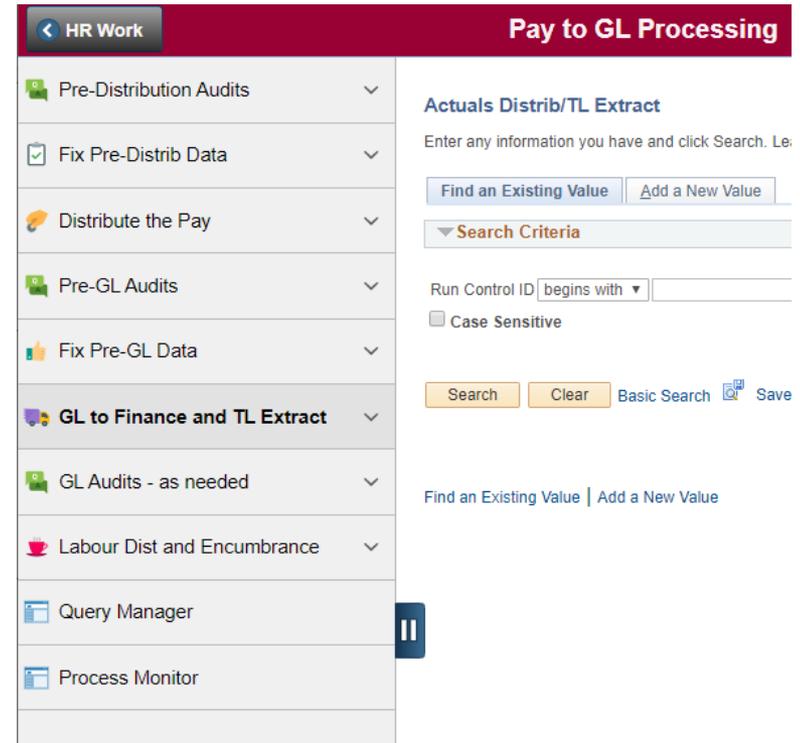


# Navigation Collections – Efficient Access

- HR Reporting Hub = over 50 queries and reports all in one place
- Only see what you have access to, which reduces clutter
- Many users were happy to find they had access to more reports and queries than they realized

The screenshot displays the HR Reporting Hub interface. At the top, there is a dark red header with 'Administrative Home' on the left and 'HR Reporting Hub' on the right, accompanied by home and search icons. A left-hand navigation menu lists various report categories, each with a dropdown arrow: 'Review Time and Exceptions', 'CTO Bank and Balance Mgmt', 'Job and Employee Info', 'Recruitment Info', 'Budget Mgmt - Dept Budg Tbl', 'Pymt Actuals - Pay Period', 'Pymt Actuals - Fiscal Period', 'Pymt Actuals - Fiscal Year', 'Pymt Actuals - ID - Dt Range', and 'Pymt Actuals w Commitments'. The main content area is titled 'Payable Time Summary Report' and includes a search form with the text 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are buttons for 'Find an Existing Value' and 'Add a New Value'. A 'Search Criteria' section contains a dropdown menu set to 'begins with' and a 'Case Sensitive' checkbox. At the bottom of the search form are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. A second set of buttons for 'Find an Existing Value' and 'Add a New Value' is located below the search form.

# Navigation Collections – Efficient Access



- Continuous improvement:
  - Expanding use of Nav Collections (e.g.: back-office; power users), including using for sequenced activities (e.g. pay-to-GL)
  - Working to add related content (i.e.: help and support info), and simplified analytics

# QUESTIONS



thank  
you