

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
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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 

*Effective Date04/29/2019

Go To Row

Effective Sequence0

*ActionData Change

HR StatusActive

ReasonNew Contract

Payroll StatusActive

*Job IndicatorPrimary Job

History

Position Number00110274

Office Assistant I

Override Position Data

Position Entry Date09/04/2018

☐ Position Management Record

Regulatory RegionCANCanada

CompanyMACMcMaster University

Business UnitMAC01McMaster University

Department10507HRSC Operations

Department Entry Date09/04/2018

Location31-202CAMPUS SERVICES BLDG. 202

Establishment ID


Date Created04/30/2019




Last Start Date09/04/2018

Expected Job End Date08/30/2019

☒ End Job Automatically





Work Location  Find First 1 of 3 Last

*Effective Date  Go To Row  

Effective Sequence *Action

HR Status Reason


Payroll Status *Job Indicator


Position Number  Office Assistant I Current 

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

Job Data

Employment Data

Earnings Distribution

Benefits Program Participation

McMaster Specific

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.

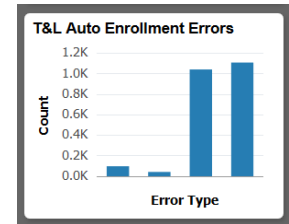


Time & Labour Auto Enrollment

- 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 renders 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)

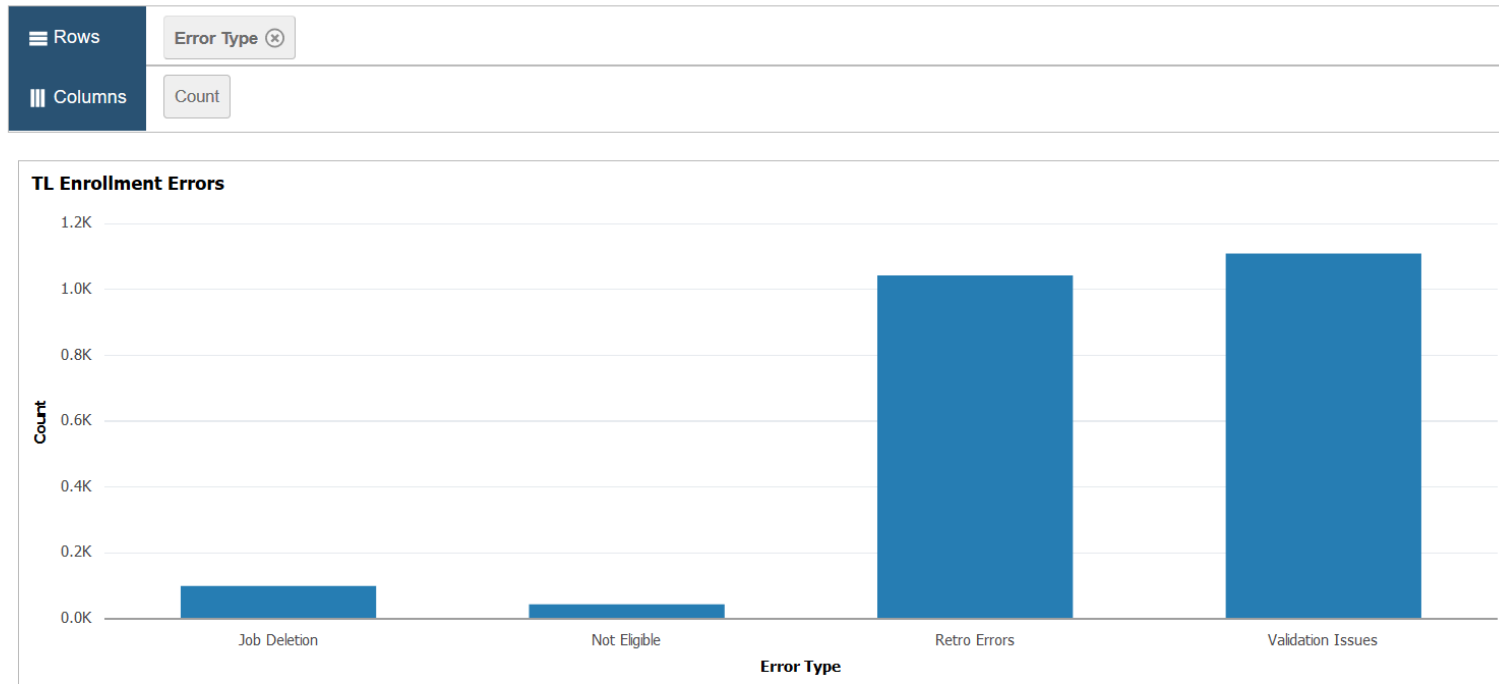
Employee Type

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

Union Code

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

More



ID	Actions	Empl Record	Effective Date	Effective Sequence	Name	Jobcode	Employee Type	Department	Location	Union Code	Error Type	Error Open Since
		1	01/01/2017	0		TEMPORARY/CASUAL/TRANSITIONAL	Hourly	Psychiatry	HEALTH SCIENCES CENTRE 3G53	ESA	Retro Errors	2018-03-09-11.30.04.00
		0	04/18/2015	0		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)
Overnight Jobset	HRSCHD1 -Pay Report: PAYRPT1A	HRSCHD2S -Absence Calc: SAMCALCA -Pay Report: REPORT2S--> PAYRPT2A and ABGENSAM	HRSCHD3 -Pay Report: PAYRPT3A
Noon	PAYRPT1B	PYRPT2BS-> PAYRPT2B and ABGENSPM	After pay confirm: Request REMITSAM
3:00 PM	N/A	BTUNEUPW - Pay Report : PAYRPT2C	
Faculty			
	Day 1 (Monday)	Day 2 (Tuesday)	Day 3 (Wednesday)
Overnight Jobset	HRSCHD1 -Pay Report: PAYRPT1A	HRSCHD2F -Absence Calc: FAMCALCA -Pay Report: REPORT2F--> PAYRPT2A and ABGENFAM	HRSCHD3 -Pay Report: PAYRPT3A
Noon	PAYRPT1B	PYRPT2BS-> PAYRPT2B and ABGENFPM	After pay Confirm: Request REMITFAM
3:00 PM	N/A	BTUNEUPW - Pay Report : PAYRPT2C	

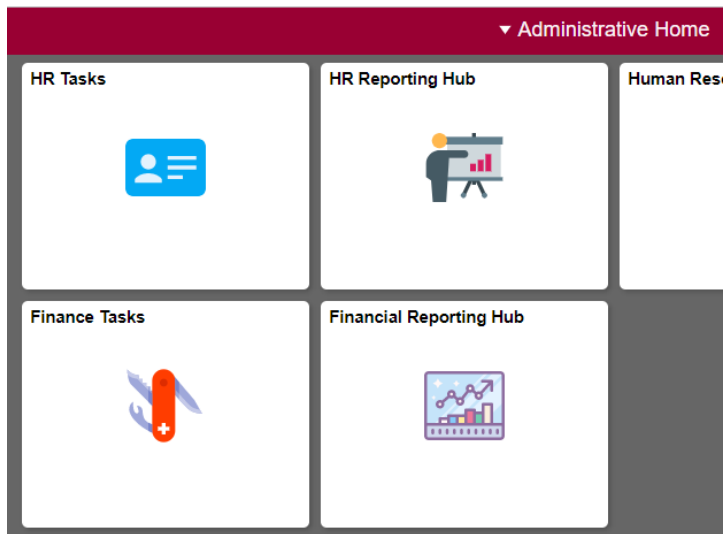
Example of a Nightly Job Set

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

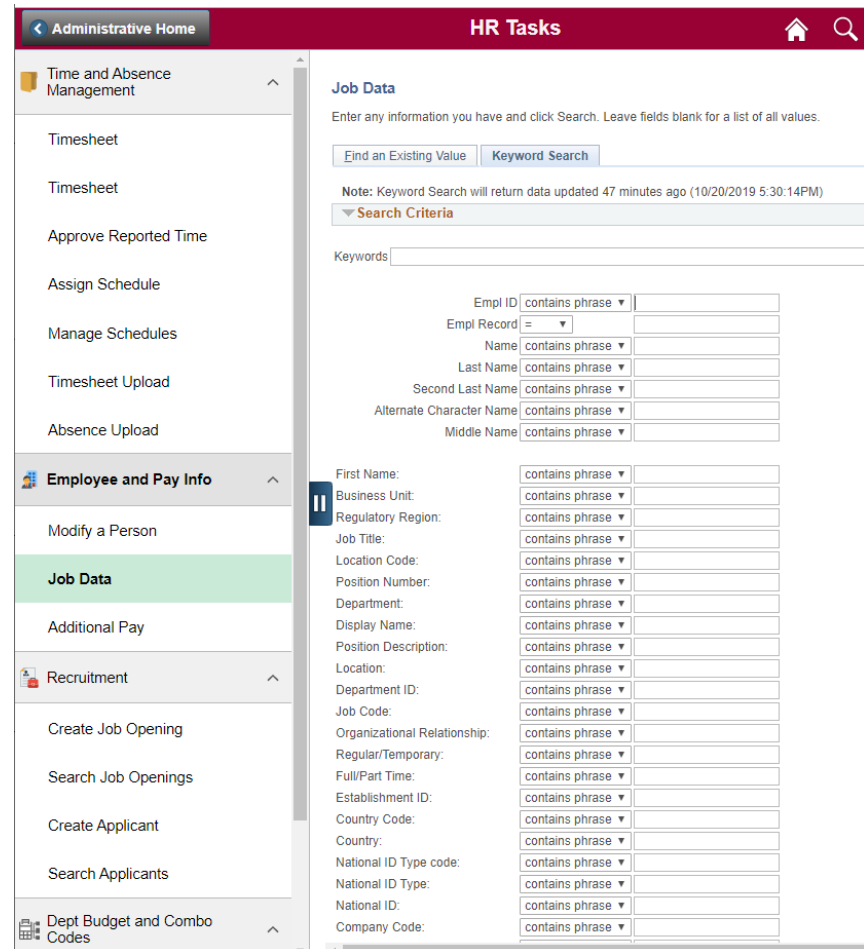
1030927 - PAYRPT2A Success
1030934 - PAY010 Success
1030935 - MCMFY007 Success
1030936 - PAY008 Success
1030937 - MCM_PYTL_ERR Success
1030938 - MCM_DDAU_RPT Success
1030939 - MCM_011_JOB Success
1030940 - MCM_PAY011 Success
1030941 - PSQUERY Success
1030942 - PSQUERY Success
1030943 - PSQUERY Success
1030944 - PSQUERY Success
1030945 - PSQUERY Success
1030946 - PSQUERY Success
1030947 - PSQUERY Success
1030948 - PSQUERY Success
1030949 - PSQUERY Success
1030950 - PSQUERY Success
1030951 - PSQUERY Success
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1030957 - PSQUERY Success
1030958 - PSQUERY Success
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

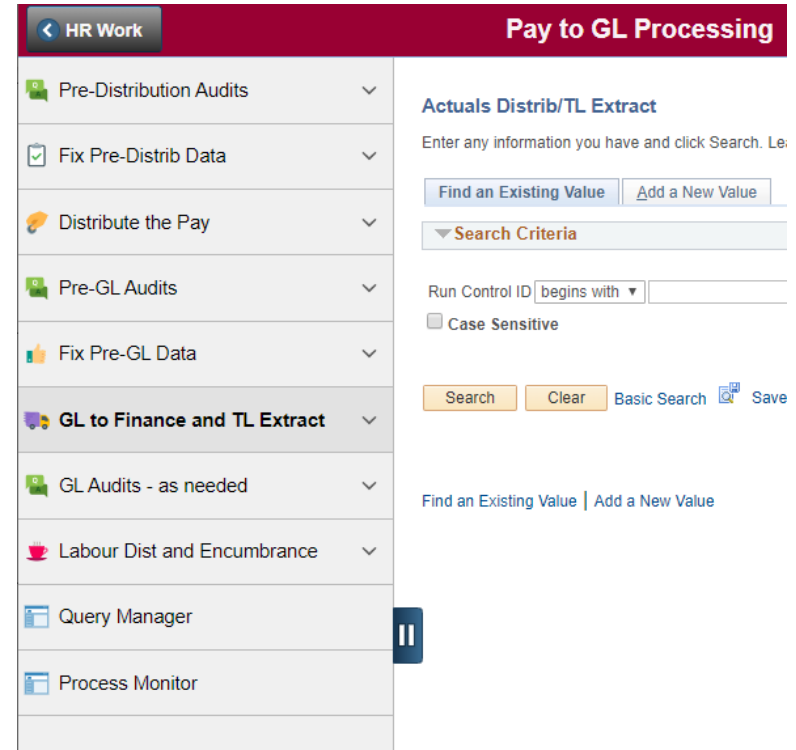
- HR Reporting Hub = over 50 queries and reports all in one place
- Only see what you have access to, which reduces clutter
- Many users were happy to find they had access to more reports and queries than they realized

The screenshot displays the HR Reporting Hub interface. On the left is a sidebar with a list of navigation collections, each with an icon and a dropdown arrow:

- Administrative Home
- Review Time and Exceptions
- CTO Bank and Balance Mgmt
- Job and Employee Info
- Recruitment Info
- Budget Mgmt - Dept Budg Tbl
- Pynt Actuals - Pay Period
- Pynt Actuals - Fiscal Period
- Pynt Actuals - Fiscal Year
- Pynt Actuals - ID - Dt Range
- Pynt Actuals w Commitments

The main area on the right is titled "Payable Time Summary Report". It includes a search bar with the text "Enter any information you have and click Search. Leave fields blank for a list of all values." Below the search bar are two buttons: "Find an Existing Value" and "Add a New Value". A "Search Criteria" section follows, containing a dropdown menu for "Run Control ID" with the value "begins with" selected, and a checkbox for "Case Sensitive". At the bottom of the search section are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria". Below the search section, there are links for "Find an Existing Value" and "Add a New Value".

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