



Texas Skyward User Group Conference

Human Resources Year End Boot Camp

James Phillips



TX – 5U – Human Resources Year End Boot Camp



This session covers the items needed to wrap up the closing year and ring in the New Year for Employee Management, Payroll, Time Off, Sub Tracking and more...

- Create new Employee Management plan
- Export assignments to create contracts and pay records for the new year
- Payroll Audits and Reporting for comparing new year data
- Time Off Year End Payout
- Time Off Year End Purge
- Calendars – Options for creating new school year calendars
- Sub Tracking Year End processing
- Other miscellaneous tasks for preparing for the new school year

Once the new year pay records/contracts have been created and prior to running the payroll it is recommended to run comparison reports and audits.

Payroll Comparison Reports - WH\AD\EM\RE\CP - 11786 - 05.16.06.00.08 - Google Chrome

<https://pbroker1:489/scripts/cgiip.exe/WService=11509web/hemmgedit090.w?isPopup=true>

Payroll Comparison Reports

Select Report to Print	Report Description	Print
<input type="radio"/> Compare Current Plan to Payroll <input type="radio"/> Compare Payroll to Current Plan <input checked="" type="radio"/> Combine the 2 Reports into 1 Report <input type="radio"/> Compare Assigns in EM to Pay Recs in Payroll <input type="radio"/> Compare Pay Rec Accts to Assignment Accts	This report will combine the exceptions generated by the 'Compare Current Plan to Payroll' and 'Compare Payroll to Current Plan' reports and put them into one report.	Back

Employee Selection Parameters

* Selection Parameters: Comparison Default Parameters

Asterisk (*) denotes a required field

Calendars are typically created at the beginning of budgeting season in Salary Negotiations. Calendars must be updated for Sub Tracking and True Time at a minimum.

Calendar Codes - WHNEP\PS\CO\CA - 31874 - 05.16.06.00.08 - Google Chrome

<https://pbroker1:489/scripts/cgiip.exe/WService=11509web/qcalbrws001.w?isPopup=true>

Calendar Codes

Calendar Codes for Fiscal Year: 2016-2017

Description ▲	Code
▶ 176 DAY - 2HR	176 DAY 2H
▶ 176 DAY - 4HR	176 DAY 4H
▶ 176 DAY - 8HR	176 DAY 8H
▶ 187 DAY	187 DAY
▶ 187 DAY 7.5HR	187 PARA
▶ 192 DAY	192 DAY
▶ 192 DAY 7.5HR	192 PARA
▶ 197 DAY 7.5HR	197 PARA
▶ 197 DAY 8HR	197 DAY
▶ 202 DAY 7.5HR	202 PARA
▶ 202 DAYS 7.5HR	202 DAY
▶ 202 DAYS 8HR	202 COACH
▶ 205 DAY 7.5HR	205 PARA
▶ 205 DAY 8HR	205 DAY
▶ 207 DAY 8HR	207 DAY
▶ 210 DAY 7.5HR	210 PARA
▶ 210 DAY 8HR	210 DAY
▶ 215 DAY 7.5HR	215 PARA
▶ 215 DAY 7.5HR GRANT	215 GRANT
▶ 215 DAY 8HR	215 DAY
▶ 220 DAY 7.5HR	220 PARA
▶ 220 DAY 8HR	220 PROF
▶ 226 DAY	226 DAY
▶ 226 DAY 7.5HR	226 PARA
▶ 261 DAY 8 HRS	261 DAY
▶ 261 DAY CUSTODIAN	261 CUST
▶ 261 DAY GM	261 GM
▶ Food Service - 7HR	FS 7HR
▶ Food Service Manager - 7.5HR	FSMGR
▶ Food Service Manager - 7HR	FSMGT
▶ Food Service Manager - 8HR	FSMGR8HR
▶ Substitute Calendar	SUB

It is strongly recommended to retain the detail during the Time Off Year End purge.

Time Off Year End Purge - WH\TO\YE - 30520 - 05.16.06.00.08 - Google Chrome

<https://pbroker1:489/scripts/cgiip.exe/WService=11509web/htoyeedit001.w?isPopup=true>

Time Off Year End Purge

Template Settings

* Template Description:

Share with other users in the district

* Roll Over Through Date:

* Page Break on Employee: Yes No

* Prior to processing roll codes, the system should:

- Keep time off detail, summary record is not built
- Remove detail transactions with a date prior to 'Roll Over Through Date', leaving a summary record

Include inactive time off codes

* If inactive time off codes are encountered, print exception and

- Allow processing to continue (process inactive code as active)
- End processing

* Selection Parameters:

Asterisk (*) denotes a required field

To ensure the appropriate holiday hours or Non-Work hours are included on the timesheet we must update the calendar in True Time.

Maintain Timekeeping Rule - WHHT\PS\CF\TR - 8757 - 05.16.06.00.08 - Google Chrome
 https://pbroker1:489/scripts/cgiip.exe/WService=11509web/htttrtabs000.w

Maintain Timekeeping Rule

Timekeeping Rule Name: PARAPROFESSIONALS (08/08/2015 -)

Buttons: Edit Add Delete Example Close

Selection Params.

Payroll Rules

Annualized Pay

Automatic Addon

Clock In/Out

Timesheet Submission

▶ Daily OT

Comp Time

Guaranteed Hours

▶ Shift Differential

Time Off

Pay Codes

Early Out

Schedule Maint

IP Restrictions

Time Off Options

Include time off in True Time

Do not include timeoff in overtime calculations

Include All Time Off Codes in True Time ?

Include Group 9 Time Off Codes in True Time ?

When returning from a TOOF status use Time Off incremental rules when calculating the TOOF duration ?

Have the web incremental screen use the reason assigned to the time off code in the browse below ?

Use Employee's True Time Schedule to determine Hours per Day for Time Off Codes with Unit Type = Days ?

Include holidays in True Time

Do not include holidays in overtime calculations

Designate a calendar that contains the holidays for this rule set:

Fiscal Year: 2016-2017

* Calendar: 187 PARA 187 DAY 7.5HR

When determining Holiday hours:

Use the Active Hours from the calendar's day

Use employee's True Time schedule ?

Use the calendar on the employee's profile ?

Use the employee profile calendar for holidays and the True Time schedule for duration ?

Buttons: Save Cancel

Time Off Code Setup

Time Off Code	Description	Group Code	Inc In True Time	Inc In Paid Time	Inc In OT	Inc In Cont
ADMLV	ADMINISTRATIVE LEA	9	Yes	Yes	No	Yes
BUSLV	BUS LEAVE TCHR/DRVI	1	Yes	Yes	No	No
COMP	COMPENSATION TIME	3	Yes	Yes	No	Yes
COMP1	Compensation	3	Yes	Yes	No	Yes
DOCK	DOCK NO LEAVE AVAIL	9	No	No	No	No
DOCKS	DOCK SUPPORT	9	No	No	No	No
DONAT	DONATE SICK LEAVE	9	No	No	No	No
JURY	JURY DUTY	9	Yes	Yes	No	Yes
JURY2	JURY DUTY-DUAL POS	9	Yes	Yes	No	Yes

28 records displayed Time Off Code: ABC

Asterisk (*) denotes a required field



Texas Skyward User Group Conference

THANK YOU FOR ATTENDING!

