BI Time Reports and other Coming Attractions
April 20, 2010

HR Conference Call Agenda – April 20

- Employee Group/Subgroups and Wagetypes – update
- Social Security Mismatches – update
- Info needed for Faxes and Tickets
- OM Workshops – update
- Training – coming to you!
- **NEW CALL IN PHONE NUMBER EFFECTIVE MAY and on**
  - **May 4 and May 11 (919) 715-0769**
  - **May 18, May 25….. (919) 733-2511**
- Retirement Enrollment – follow steps – DO NOT USE PA 30!
  - Benefits will pull report to catch those not created at this time
- Org Unit can be added to ERP reports - visual
- BI Time Reports
- Data Migration – Employee and Position History
- Coming Attractions – Fall Release

Social Security Mismatches

- BEST Payroll runs a check every month on previous month's entries.
  - Target date for identification of errors = mid month
  - Target date for corrections of errors = prior to PY corrections
- All errors will be reported on monthly error report.
- HR/Payroll data compared with Social Security Data
  - Name and Social Security Number match
  - Name and Birth date match
  - Name and Gender match
- If and when data kicks out, it is not compared any further
  - You may see same names three months in a row.
  - While checking the first, you might want to double check the birth date and the gender.

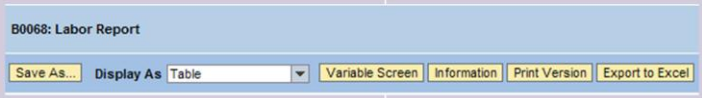
Social Mismatch Business Process

- BEST SS HR will email spreadsheet to one person in each agency (others in agency can be copied), BEST, and BEST HR specialist.
- BEST will create a ticket in agency person's name.
- Agency person will receive email with ticket number.
- Agency person will fax social security info or other needed info to BEST using that ticket number.
- Info will be attached to that ticket.
- BEST HR Specialist will work problems on spreadsheet and close ticket after all on spreadsheet have been resolved.

Information Needed for Fax or Email to BEST

1. HR Rep Name
2. HR Rep Employee Number
3. Reference to specific subject matter such as Social Mismatch, Release 1, Authorities and Resources, etc.
4. Ticket number if ticket has been opened – ticket will have already been opened if it is Social Mismatch

Release 1, 2010

	Deliverable	Notes
☺	BI: *Variable Screen* button moved from filter screen to main screen 	This change will reduce steps to get to variable screen
✓	Employee Group, Subgroups, and Wage Types	See next slides for details

✓ In release as promised X = Didn't make release ☺ = Added to release

Changes to Date Specifications – IT 41

- Reinstatement from LOA and Transfer within Agency - action will pull a COPY of the current IT. Agency can change the Agency Hire date if necessary. Before, the action effective date was defaulting. Save the infotype…..
- Reinstatement from Separation has not changed. Action presents the Agency Hire Date on IT 41 as date of the current action. Agency can change to prior date if necessary.
- Special functions for Judicial and Lottery
- Temps do NOT have an IT 41….do not create one for them.

Most Actions….
Agency Hire = Effective Date of Action

Create Date Specifications (0041)

Personnel No	88888884		Name	Ralph Nelson Phillips	
EEGroup	P	SPA Bi-Weekly	PersA	1501	Transportation
EESubgroup	B1	FT S-FLSAOT Perm	Statu	Active	
Start	03/01/2010	to	12/31/9999		

Date Specifications

Date type		Date	Date type		Date
01	Original Hire Date	03/01/2010	02	Agency Hire Date	03/01/2010

Reinstatement from LOA and Within Agency Transfer: Original dates default. COPY & SAVE

Copy Date Specifications (0041)

Personnel No	88888884		Name	Ralph Nelson Phillips	
EEGroup	P	SPA Bi-Weekly	PersA	1501	Transportation
EESubgroup	B1	FT S-FLSAOT Perm	Statu	Active	
Start	03/15/2010	to	12/31/9999		

Date Specifications

Date type		Date	Date type		Date
01	Original Hire Date	03/01/2010	02	Agency Hire Date	03/01/2010

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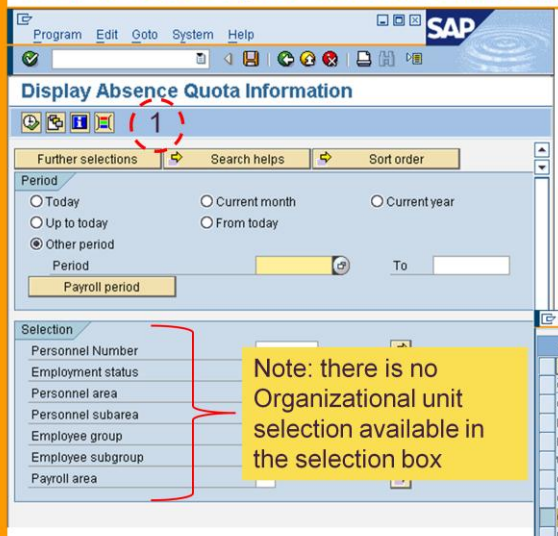
Request to Add Organizational Unit as a Selection Criteria to ERP Reports

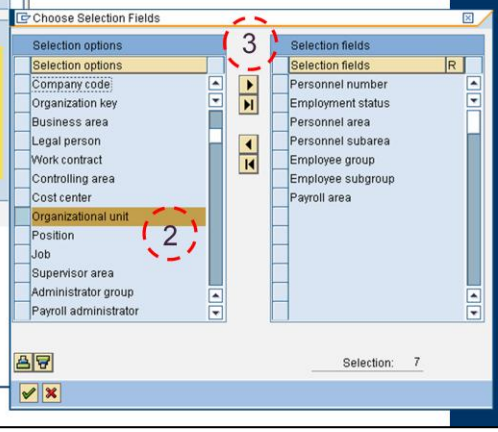
How to add Organizational Unit to Report Selection



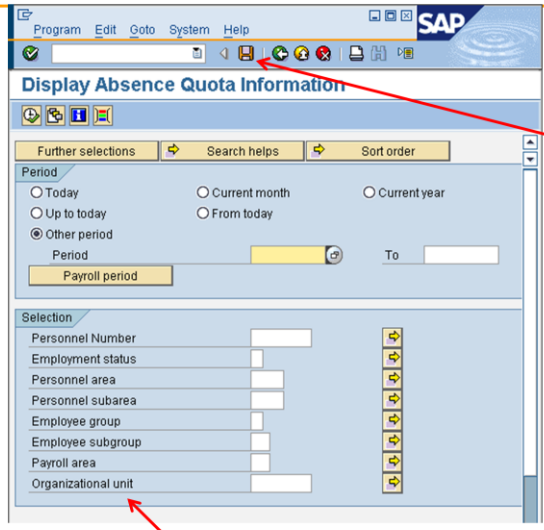
Step 1: use *Further Selections* button

Step 2: on the Choose Selections Fields screen, select *Organizational unit*

Step 3: add *Organizational unit* to the Selection fields box, using the add button



How to add Organizational Unit to Report Selection cont.



If you want *Organizational unit* to always appear when you run the transaction, you can save this configuration by saving a variant.

Organizational unit is now available in the selection box

Post-Release

Date	Deliverable	Notes
May	DOA Parking Interface (Phase 1)	Will provide extract files with payroll deductions and employee perner's
May 10	BI Time Reports Pilot	Details will be presented in next section
May 28	Position & Employee History BI Reports	Details will be presented in next section

New Functionality Coming in May

BI Time Reports – Pilot Project

What are BI Time Reports?

- The BI Team is working on a project to extract time data from the ERP system to produce a series of new reports to cover a number of high priority needs such as
  - List quota balances for multiple employees
  - Create an employee time statement for a user defined period
  - Review holiday time reporting for errors
  - Determine who's late in submitting or approving timesheets
  - Review when comp time is aging out
- There are 12 reports grouped into 4 categories
  - Quotas – 6 reports
  - Comp Aging – 1 report
  - CATS – 2 reports
  - Voluntary Shared Leave – 3 reports
- **Reports with detailed absence/attendance data will be limited to dates within the current month and three previous months**

A Big Thank You to Agency SME's/Designers

- SME's from various agencies are working with the BI Team to design and test the reports

Name	Agency
Marshall Barnes	NC Legislature Fiscal Research
Andrea Cannon-Mang	Dept of Justice
Phyllis Creech	Dept of Agriculture and Consumer Services
Matt Daughtrey	Dept of Transportation
Dan Domico	Crime Control and Public Safety
Sherry Forbes	Information Technology Services
Kim Greene	Crime Control and Public Safety
Patty Norris	Dept of Environment and Natural Resources
Bill Stockard	Office of State Budget and Management
Brenda Warburton	Office of State Personnel
Debbie Watkins	Administrative Office of the Courts
Vicky Williford	Dept of Correction
Mike Zeinstra	Dept of Health and Human Services

Who will have access to reports?

- Security is based on having a specific ERP role and having access to the Time tab
- In BI reports, a user has access to the top org unit in the associated ERP role and to all other org units that flow down from that point

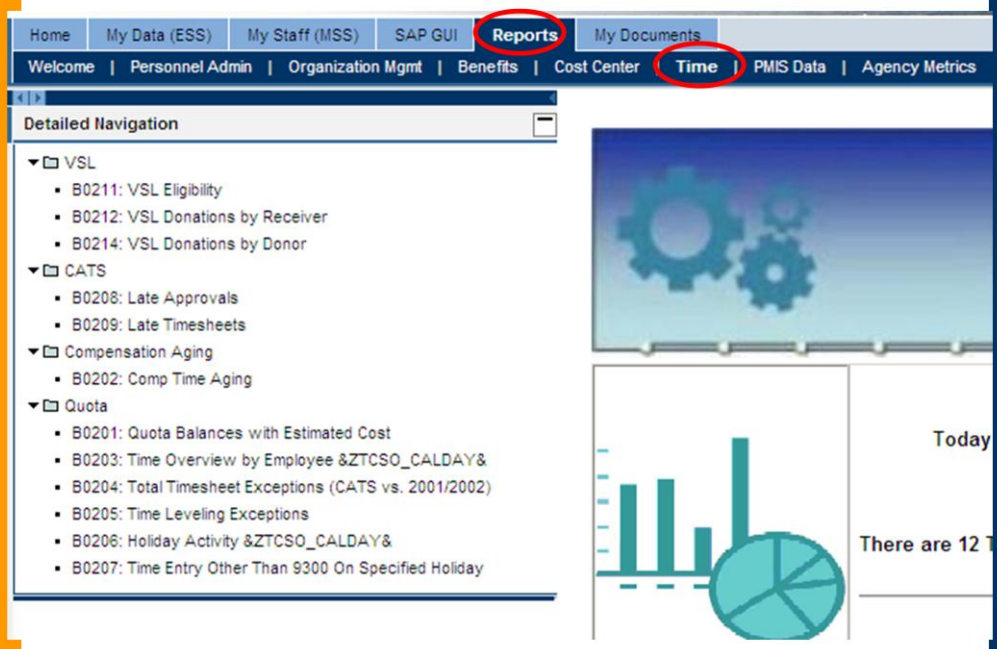
	BI Report Group/Name	ERP Security Role
VSL	B0211 VSL Eligibility B0212 VSL Donations By Receiver B0214 VSL Donations by Donor	Leave Admin or Master Data Maint.
CATS	B0208 Late Approvals B0209 Late Timesheets	Display Time or Display Payroll
Aging	B0202 Comp Time Aging	Display Time or Display Payroll
Quota	B0201 Quota Balances with Estimated Costs	Display Payroll
Quota	B0203 Time Overview by Employee B0204 Total Time Exceptions (CATS vs. 2001/2002) B0205 Time Leveling Exceptions B0206 Holiday Activity B0207 Time Entry Other Than 9300 on Specified Holiday	Display Time or Display Payroll

Note: VSL security roles are still under discussion

Roll-Out Plan for Time Reports

- The new reports will be available in production to a pilot group of users on May 10
  - The pilot users are from the agencies represented in the SME list
- The pilot users will provide feedback to the project team on errors/issues and the usefulness of the reports
- At the end of August, the BI Time Project team will assess whether the new reports are of significant value to deploy to additional users and a deployment timeframe will be created
- **Training on the new reports will be through a webinar presentation and assumes the user is already familiar with BI report functions**

New Reports Tab and Menu



B0201 Quota Balances with Estimated Cost

Display includes quota types: Vacation, Sick, Overtime Comp, Gap Hours Comp, Holiday Comp, and Bonus. All other quotas are available by adjusting the report filter.

			Calendar Day	09/30/2009			Overall Result	
			Quota/Att&Abs Type	10 : Vacation Leave		15 : Sick Leave		
Organizational Unit		Employee Name	EE Nbr	Ending Balance	Estimated Cost	Ending Balance	Estimated Cost	Ending Balance	Estimated Cost
20000015	OSP Director's Office	[redacted]	[redacted]	154.53	8,942.65	72.00	4,166.64	226.53	13,109.29
		[redacted]	[redacted]	7.83	271.07	8.00	276.96	15.83	548.03
		[redacted]	[redacted]	387.03	8,437.25	1,311.79	28,597.02	1,698.82	37,034.27
		[redacted]	[redacted]	293.31	16,079.25	1,077.74	59,081.71	1,371.05	75,160.96

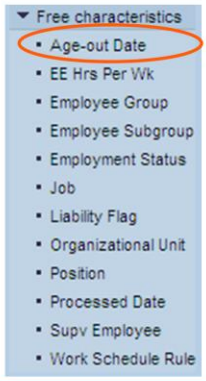
Estimated Cost is based on a calculated hourly rate. For a FT employee, the rate is the annual salary / 2080.

Free characteristics

- Age Range
- Cal Mth/Yr
- EE Hrly Rate
- EE Hrs Per Wk
- Employee Group
- Employee Subgroup
- Employment Status
- Job
- Mths of Svc
- Personnel Area
- Personnel Subarea
- Position
- Position County
- Supervising Employee
- Supervising Position
- Time Mgmt Status
- Time Type Group
- Working Week
- Work Schedule Rule

B0202 Comp Time Aging

Employee Name	EE Nbr	Cal Mth/Yr / Quota Type	Overall Result / Remaining Hours	APR 2010 / Remaining Hours	MAY 2010 / Remaining Hours	JUN 2010 / Remaining Hours	JUL 2010 / Remaining
[redacted]	[redacted]	OT Compensatory Time	45.00	0.00	37.00		
[redacted]	[redacted]	OT Compensatory Time	54.50	4.00	7.00	4.25	
[redacted]	[redacted]	OT Compensatory Time	9.00	0.00	6.00		
[redacted]	[redacted]	OT Compensatory Time	21.50				



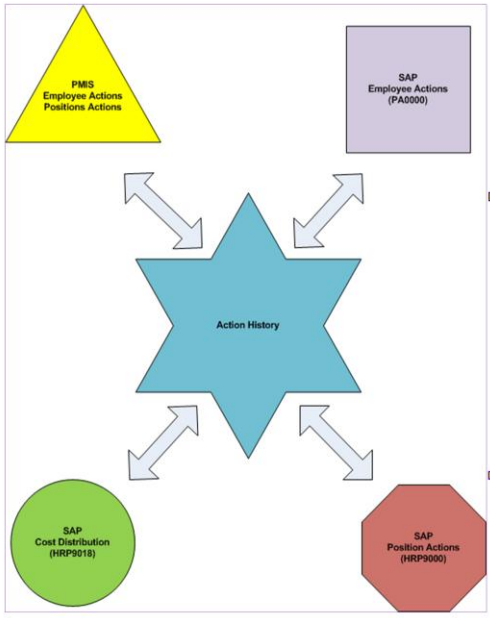
Drag on Age-out Date to see the specific expiration date

- Blank cell means no comp time is set to expire for this period
- 0 value means comp time set to expire this period was used

Data Migration Summary

- Phased Approach
- Action History's delivered in May
- Headcount is scheduled for Release 2 – 2010
- Two additional initiatives are in scope
- Will need active Agency participation in UAT
- Main objective is to "Sunset" PMIS.

Action History Conceptual Diagram



Employee Action History

Position Action History

DM Action History Project Timeline

This schedule is tentative and may change slightly depending on resource availability.

Action History Detail:

• March 29 –April 23	Development
• April 26 – April 30	Functional Testing
• May 4	User Acceptance Testing
• May 18	User Acceptance Testing (only if necessary)
• May 20 – May 26	Training (via Conference Call)
• May 27	Promote to production
• May 28	Available for Use

Employee Action History Report

- Employee action history will retrieve both SAP and PMIS data
- Accessed by Employee **Last Name** and **Last 4 SSN**
- Source system source identifier (PMIS, SAP)
- Report will pull from the following source repositories:
  - SAP Employee Actions
  - PMIS Employee Actions

Position Action History Report

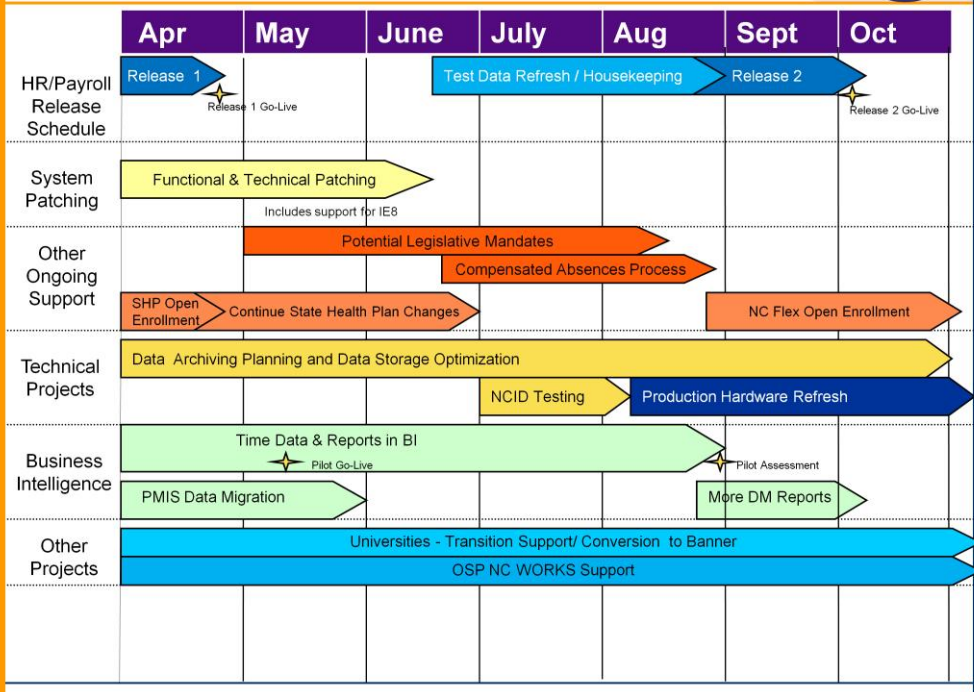
- Position History will retrieve both SAP and PMIS data
- Accessed by SAP position number
- Additional report will be provided to lookup the SAP position number and "Jump To" the position history report
- Source system source identifier (PMIS, SAP, Fund)
- Report will contain records from the following data entities:
  - SAP Position Actions
  - SAP Employee Actions
  - PMIS Position Actions
  - PMIS Employee Actions
  - SAP Position Funding

Release 2, 2010 Plan

Coming Attractions this Fall

Upcoming Projects – 7 Month Plan

04/07/2010



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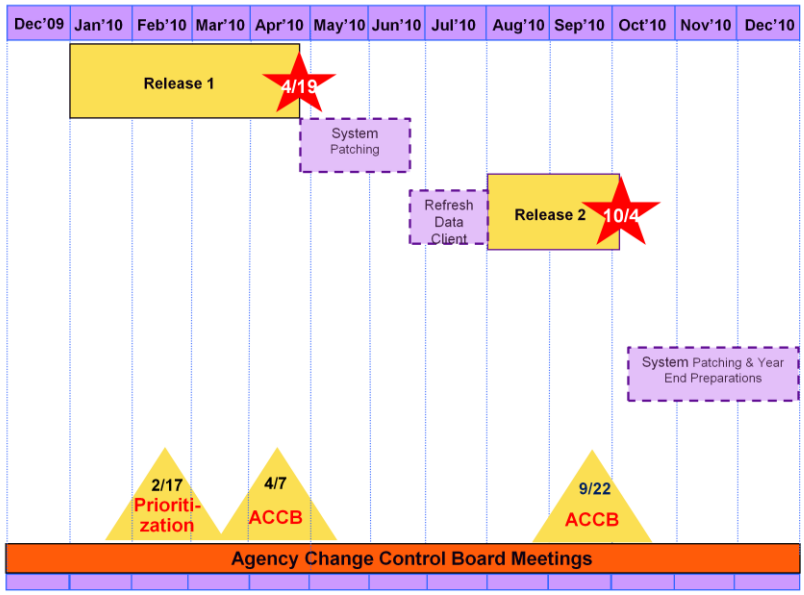
Planned Releases for 2010



NOTE:

There will be instances where bug fixes, or enhancements will go in the system on dates other than the release dates; we'll take these on a case by case basis.

Release 2 – BI

Type	Deliverable	Notes
*E	Modify Turnover Report	Request to change the default of the output from quarterly and monthly, to reporting the final results for a requested timeframe
*E	Add DOB for *B0095-1: Employees by Personnel Area* and *B0037: Employee Personnel Data*	Approved by OSP
*E	Add "age" but also keep age range on *B0033:Emps in Graded & Non-Graded Classifications* and *B0035: EEO General Demographics*	Approved by OSP

* Agency Request Submitted through CCB

BF = Break Fix E = Enhancement N = New Functionality

Release 2 – BN, OM

Type	Deliverable	Notes
E	NC Flex Annual Enrollment Changes	
N	Workflow Validations based on Infotype status	System will stop new workflow from being created if there is an existing one already in process for the same position; Will prevent PCR's from getting "stuck" in the system

* Agency Request Submitted through CCB

BF = Break Fix E = Enhancement N = New Functionality

Release 2 – PA, PY, Time

Type	Deliverable	Notes
N	PA Workflow Reminder Message to complete other steps (PA30/PA40)	
*N	ITS interface - Employee Email Directory	
*N	DOA parking interface -Phase 2	Will provide additional extract files
*N	Add warning message when changing CATS record tied to an FMLA Event	
*N	Create mechanism to prevent changes to CAT2 records prior to a specified date	Similar to the creation of the "payroll wall"

* Agency Request Submitted through CCB

BF = Break Fix E = Enhancement N = New Functionality

Questions?