



June 2006 - Employee Payroll and H/R Enhancements Summary Release 10.0

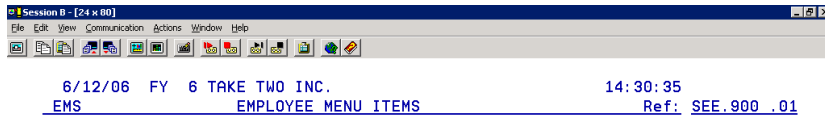


This release is full of new items and program enhancements for both H/R and Payroll Staff. There are no new modules - but significant enhancement and new utility programs and items that deserve discussion.

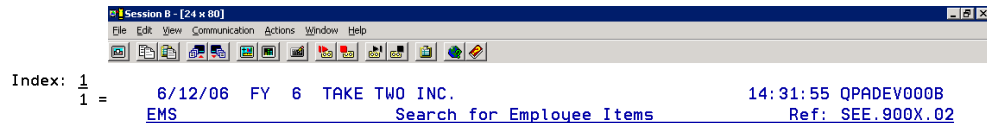
Release information should be reviewed as a group. At minimum, Payroll and H/R should meet separately for 1-2 hours to review this document. It is a really GREAT idea to have on-hand the current and last release notes for review and qualification.

.. Don't forget about GUI for EMS end users. A new release was available in February and another new one is available now! The graphical point-n-click for employee lookup and information downloading is worth having for all of your clerks and middle managers PLUS it is the tool that should be on Superintendent(s) desks for employee information gathering and for auto loading to their PDA.

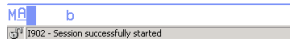
.. Don't forget about the new SEE.900. This is a fabulous tool to find CIMS reports and options based on description. E.g.: Give me any CIMS option that has the word absence in it.



Search for: ?ABS? example ?GRID?
Leave Blank to Exit



"X" Menu Item	Description
ABSEXCEL	DOWNLOAD EMP ABSENCE DETAIL EMSTRANS/ABSEXCEL
PAI.502	EMPLOYEE TIME ABSENT/WORKED DETAIL LISTING
PAI.504	EMPLOYEE ABSENCE REPORT
PAI.509	EMPLOYEE ABSENCE BANK LIABILITY LISTING
PAI.522	EMPLOYEE ABSENCE BANK PROFILE
PAI.602	PAYROLL ABSENCE PROMOTION
PAY.121	ABSENCE/LEAVE CODES
PAY.121L	ABSENCE/LEAVE CODE LOOKUP
PAY.221	ABSENCE/LEAVE CODES LISTING
PAY.409	MASS ABSENCE ENTRY
PAY.409A	MASS ABSENCE ENTRY
PAY.419	EMPLOYEE ABSENCE HISTORY MAINTENANCE
PAY.531	ABSENCE/LEAVE REPORT WRITER
PAY.590	EMPLOYEE ABSENCE/LEAVE LISTING
PAY.595	ABSENCE MONTHLY SUMMARY LISTING
PAY.596	ABSENCE SUMMARY BY EMPLOYEE GRID LISTING
PAY.597	ABSENCE SUMMARY/AVERAGE LISTING
PAY.598	ABSENCE CODE PROFILE SUMMARY & DETAIL
PAY.739	ABSENCE / LEAVE REPORT WRITER DEFINITIONS





CIMS Human Resource Related Items

Position Definitions EIS.154

- CIMS can provide a nightly download of staff to be picked up/used by the network for generating email accounts etc. This new field in EIS.154 allows district control of which position codes should be considered in downloads (e.g.: Sub Teachers, Casuals, ...)

Employee Skill/endorsement Checkboxes EIS.180 - EIS.380 ****Careful**

- The format of the screen was changed to reflect the same order that the items will appear within EIS.380. This release should impact nothing ... but you need to be aware/check that this is the case when the new release is loaded. Make sure you are still happy with the way the skills screen/checkboxes appear.

General Report Writer Formats - EIS.260

- Added who created the format, when it was last changed, last used
- Added a new Restricted Y/N. If you mark the format as Restricted 'Y' - then you are the only user that will be able to edit the format (anyone can use it)
- Build File is 999 characters wide. You can create a format and bypass the 'too wide warning'. Your build file will contain all the items even though the report will cutoff (if printed).
- New items included in report writer - Sick Balance #604 (looks for any SIC*), Vacation Balance #605 (looks for any VAC*)
- New for certificate/endorsement reporting - If you select to include certificate info #240 system will include for the employee ALL certificates .. Now, if you limit to certificate XXX on the select - then #240 will include only information about that specific certificate
- New #279 Contract Details to print all contract distribution, signed, authorized date info
- New #854 Position Annual Average FTE (based on the calendar and line types you dictate in calculating the field)

Special Note: Some districts complain that the report writer is cutting off fields even though there is room. Here is the problem. If you first create a report and have not allowed enough width - the system tries to help by truncating fields. When you finally expand the report size - system is not smart enough to know to un-truncate. If you find that a report is cutting off fields and it shouldn't simply type back over all the field numbers (as if to re-add the fields) and the report will re-format itself.

Report Writer - EIS.530

- New select option for 'Missing Taxable Benefit'

Employee Hire/Rehire Screen

- New display only field called Alternate Employee#. If you are using uploads/downloads to your network and under the unlikely occurrence you have an alternate number used for employee# - CIMS can now accommodate

Employee Demographic Screen

- Re-titled Maiden Name to MAIDEN/FORMER
- Re-titled OFFICE PHONE to ALTERNATE PHONE
- Added new Index by Email Address
- Added F4 for certificate and endorsement indexes

Employee Evaluation Listing - EIS.560

- New close date range to report on closed/cancelled evaluations. If you are ending an assignment in PRO.300 always look to evaluations and consider - If there are pending evaluations should you be leaving them open OR should you close them off indicating that you are no longer expecting this evaluation to complete. If you just leave it pending - it will continue to appear on outstanding listings FOREVER!
- Added option to email letters to evaluators. This will email a letter for every person still waiting to be evaluated to the evaluator based on entry made in the evaluation screen.

Employee Professional Growth Checklist - EIS.569 **New Item

- New Report to check on employees that have or are missing particular PD course entries, i.e.: look for all bus drivers missing their first aid. The report will identify all employees from the group and indicate whether the course is found (and with what authorize, expire dates).

Update Demographic Screen (Main F6) Location & Prim Assign - EIS.964

- New option to compare/report on differences between current F11 History Line and what the front demographic screen says on the employee. There is commonly confusion as to who (HR or Payroll) should be updating the Main demographic screen and there could be MANY occasions where the information is not getting updated appropriately. The purpose of this new option is to get districts comfortable with auto updating. Once we have some comfort - we will put this job to run automatically each night.
- The option has a Report Only 'Y'. This means that at minimum ALL districts should run the report with a few different groups/scenarios and see how accurate their information is on the main screen. Based on the reporting, districts can select Report Only 'N' and employees will get updated.
- Districts can control updates to locations (based on F11 PRO.300 history) AND/OR updates to primary assignments (based on PAY.345 assignment info).

School Configuration - EIS.996

- This is a tremendous report to confirm your budget and FTE. All district H/R departments should be utilizing this report .. keeping in mind that its success is dependent on how accurately and completely your employees are identified in PRO.300 history.
- Enhanced to listen to school restrictions so that schools may run for current and future year staff reporting.

001 ALEXANDER SCHOOL

ENROLLMENT		CLASSROOM CONFIGURATION	
Position	Enrollment	Classroom	#Students/Grade
Kindergarten	6	Kind-Grade 3	6 + 4 + 4 + 8
Grade 1	4	Grade 4-6	5 +10 + 5
Grade 2	4	Grade 7-8	14 + 7
Grade 3	8		-----
Grade 4	5		63
Grade 5	10		
Grade 6	5		
Grade 7	14		
Grade 8	7		

	63		
ALLOCATIONS			
ADMINISTRATION			
PRIN		THISTLEY, MARG.	.500000

			.5000
CLASSROOM TEACHERS			
GR04-6		HICKLEMAN, TOM T.	1.000000
GR07-8		BILTON, ANGELA	.500000
GR07-8	TERM	MCKAY, KEVIN	K. SMITHER .500000
GR07-8	TERM	VACANT, _____	K. SMITHER LEAVE .500000
K-3	TERM	LITTLE, KIMBERLY	S. JOHNSON 1.000000

			3.5000
CLASSROOM SUPPORTS			
COUNS	TERM	GOERTZEN, KIKI	.125000
HE/IA		ADJUST, FOR ENROLLMENTS	.130000
LITSUP	INCREASE	BILTON, ANGELA	.125000
LITSUP	TERM	MCKAY, KEVIN	.500000
LITSUP	TERM	VACANT, _____	.500000
MUSIC		BILTON, ANGELA	.250000
RESOUR		WILKE, DONNA	.250000

			1.8800
READING RECOVERY			
RR		WILKE, DONNA	D. PETERS .125000

			.1250 6.0050

Employee Absence Report - PAI.504

- New select by Reason Code to assist in analysis and reporting by absence code AND/OR reason

Employee Sick/Vacation Projection - PAI.506 ** New Report

- NEW REPORT to list/build file of vacation (or any absence code) Earned , Projected Earned and Used. This is perfect for vacation for EA, CL10, etc. when checking if they have enough time to cover for Xmas and Spring Break. This is better than just an absence report because it will factor in accrual, look at unposted Sub values, and consider increments.



File Build from any PAI.580 Option - For Mail Merging ****KEY**

- Anywhere that you can print an employee letter (EIS.995, PAI.580, EIS.380 for single employees) a file gets built automatically EMSTRANS/PPAI580(USERID). The goal here is for users to get used to this information - automatically populate an excel spreadsheet that has been pre-set with Column heading etc. ready to auto-merge with preset word documents.

ONAME	('EMPLOYEE' 'NAME')	DONNA BELL	
ONPRF	('NAME PREFIX')	DR.	
OFNAM	('EMPLOYEE' 'FIRST')	DONNA	
OMNAM	('EMPLOYEE' 'MIDDLE')		
OLNAM	('EMPLOYEE' 'LEGAL')	DONALDA	
OSNAM	('EMPLOYEE' 'SURNAME')	BELL	
ONSUF	('NAME SUFFIX')		
ONUMB	('EMPLOYEE' 'NUMBER')	1234567	
OADD1	('ADDRESS 1')	BOX 608	
OADD2	('ADDRESS 2')		
OCITY	('CITY')	LA SALLE	
OPROV	('PROVINCE')	MB	
OPCOD	('POSTAL CODE')	R0G1B0	**edit in word
OCERT	('CERTIFICATE')	9931-123	
OHARC	('HOME AREA')	204	
OHPHN	('HOME PHONE')	7364555	**edit in word
OAARC	('ALT AREA')		
OAPHN	('ALT PHONE')		
OEMAI	('EMAIL')	taketwo@taketwoinc.com	
OCURH	('CURRENT' 'HIRE')	19891231	**YYYYMMDD
OORIH	('ORIGINAL' 'HIRE')		
OCRC	('CRC')	031	
OCAR	('CAR')		
OPOSN	('POSITION')	TEACHER	
OSTYP	('SUB-TYPE')		
OLOC1	('LOCN CODE')	017	
OLOC2	('LOCN NAME')	WACHOVIA SCHOOL	
OSTS	('STATUS')		
OSTDT	('START DATE')		
OSPDT	('STOP DATE')		
OFTE	('FTE')	100.00	
OHRS	('HOURS')		
OCOMT	('COMMENT')		
OREPL	('REPLACE/ACCT')		
ORATE	('RATE/HR')		
OSCH1	('WORK SCHEDULE1')		
OSCH2	('WORK SCHEDULE2')		
OTABL	('PAY TABLE')		
OGRAD	('PAY GRADE')		
OSTEP	('PAY STEP')		
OSUBJ1 - 5	('SUBJECT1')		
OSFTE1 - 5	('SUBJ1 FTE')		
OEVL0C	('EVAL LOCATION')		
OEVNAM	('EVALUATOR')		
OEVPOS	('EVAL POSITION')		
OEVD0S	('EVAL DESCRIPTION')		
OEVRQD	('EVAL REQUESTED')		
OEVDUD	('EVAL DUE')		
OEVCM1	('EVAL COMMENT1')		
OEVCM2	('EVAL COMMENT2')		
OPSUB1	('PREFERRED SUB1')		
OPSUB2	('PREFERRED SUB2')		

- The File contains PRO.300 history information, demographics, evaluation and other categories like CAR, CRC - just in case you need to quote something in your letter!

Employee Pictures - PAY.PIC

- CIMS green screen F23 will display an employee photo (if there is one). Store employee images into folder EMPIMAGE on the /400 and store the files as emp#.jpg. This option synchronizes the picture with the CIMS ID.

Sub/TOC Listing - PAY.492R **New Option

- Same format as PAY.492 but this option will allow schools to run their own listing of available substitutes. System will know who the school is and provide appropriate elementary or high school format. If you want this option available for the schools, please contact Take Two as this would have to be added to their menu.

H/R Endorsement Grid - PAY.494 ** New Option

- Same format as PAY.492 - this will produce a nice grid of skills/endorsements for selected staff based on PRO.300 effective date lines (i.e.: print all support staff effective next September and include their skills as indicated on EIS.380).

Employee Profile - PAY.510

- Added custom profiles for TOC (include skills, CAR, CRC info) and Sub TA (include additional evaluation information). This is an excellent way to provide annual profile information to staff that needs to re-confirm status each year - e.g.: TOC/SUB teachers. We can do a custom profile per district ... consider doing this!

Employee Seniority List and Calculation - PAY.520

- Use this program to calculate seniority, report, build a file and update employee rank field. A file will auto-build EMSTRANS/PPAY520D(DONNA).

Absence Summary Grid by Employee - PAY.596 ** New Report

- One line per person - can indicate total absences taken for up to 10 absence types. Nice easy to view report.

Employee Absence Analysis/Average Statistics - PAY.597

- Enhanced to include current SUB records (not posted) to be accurate to the day!

Employee Absence Calendar & Work Calendar - PAY.805/806

- Include more leave info on calendar including FTE to assist in seeing true picture

Job Posting Screening Worksheet - POS.520

- Added SETUP TYPE option for non-teaching staff; alters report to print first 13 skill codes and indicates with "X"s which one the person has for the corresponding setup type certificate
- The goal is that CIMS should produce your screening worksheet for all applicants with information that is pertinent to hiring!

Job Posting Report - POS.521

- Enhanced to include more details printing on the report
- Enhanced to allow for just HIRED candidates

Job Postings Statistics - POS.524

- Enhanced to show posting statistics (# candidates, # jobs posted, # applicants...). Excellent information on posting/hiring.

H/R Workshop Listing - POS.541

- Added option to print registrant comments on detail report
- Include email address and mailing address in build file
- Added new appointment time field to detailed report
- Figure out current location/position at time of workshop not as of today; uses START DATE
- Added option to print "current" skills (first 3) on detail report

Mass Add applicants to Workshop - POS.565 **New Item

- New option to mass add applicants to a workshop based on either previous enrollment/attendance of another workshop OR multiple employee selection

Position History - PRO.300

- Cleaned up calling subject/skill Consistently in PRO.300 and in all subsequent reporting the word skill will be used.
- History line now shows total days expected to work in the calendar year based on teaching calendar setup in PAY.110
- History line now shows average annual FTE based on FTE and current year assignment(s) accumulated.

Emp#:	1482	AFINOGENOV, EVANS	6/27/06	CURRENT		
Record Type:	AT		CHANGED 6/27/06	TEACH	100.0000	
Location:	003	JOE LOUIS ELEMENTARY	DONNA	TEACH	4	9
Work Location:					8/27/01	12/31/29
Position:	TEACHER	ELEM		TEACHSKILL		
Subtype/Job:				FR	GEO	GR10
Status :	TERM	TERM POSITION		GR11	GR12	SOC
Leave Type :						
Effective:	7/01/05	To 12/31/05	68.2051	36		
FTE:	50.0000	AVG FTE:		Skills	FTE	POSITION#

Employee Experience Profiles - PRO.419 **Hot New Item

- F11 has been available from the experience screen to print a history of employment for the employee based on PRO.300 A? lines and accumulated experience based on start/stop dates indicated in the PRO.300 details. This is an IDEAL report to provide to staff leaving to another district wanting details of employment.
- PRO.419 provides selection to print either profiles or a summary (one line per employee) indicating total months worked according to PRO.300 details.



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First Time Paid Report - PAI.508 ** New Report

- For some districts first time paid for certain groups (e.g.: Subs, Casual) means paperwork/contracts need to get initiated. Use this report monthly to identify who NEW is being paid.

Employee Absence Bank Profile - PAI.522 ** New Report

- Excellent profile of absences showing detail dates for accrual and taken with totals indicating value remaining. This will work for any absence code that is annual (no carryforwards) .. like tracking overtime, discretionary days etc.

Employee Absence Report - PAI.504

- New select by Reason Code to assist in analysis and reporting by absence code AND/OR reason

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Payroll Processor - PAI.600M

- Minor adjustment to email paystub - compressed 2 blank lines at top to maximize information to keep to one page in length
- CUSTOM: We can change direct deposit statements to print a remit statement if it goes to two pages so you can control 2 page statements manually (if you have a stuffer). If this is a problem for your district - call Take Two!
- New Report OPAI633A. Along with current absence report OPAI633, this additional report will queue with the payroll automatically for all employees with a negative absence balance as a result of this payroll.
- New warning #24 on payroll OPAI601 report to identify employees missing SIN#
- IMPORTANT for email users: Once payroll has processed - look for an email in your own email box indicating emails have been sent. When you receive this - you know that email was successful. If you do not receive an email - then you know that your emails are probably stuck in the mail server or something is wrong.

Employee ROE - PAI.710

- New programming complete to accommodate 53 weeks (new xml format for ROE Web, new reporting, new box format). This applies to Campbell River and Mystery Lake. This means that ROE downloads will have to run through an xml schema before sending to the web (same process as T4 file).

- Payroll location# will now print in the occupation box after occupation. This may assist with sorting/seeing locations for employees.

Auto-Build Termination Records - PAI.716

- New Sort field (in background) to allow user to determine ROE sort order - alpha or alpha by location. This order transfers to the web ROE and will dictate order of print.

Payroll Deduction Register - PAI.804

- Added benefit codes to the report. Can now report Employee\$ Employer\$ Benefit\$ all in one report to make sure that employer amount and benefit amounts match
- Can now run the report for dates which cross to multiple years
- Added addenda codes to this report for those occasions where you have alike deduction/addenda codes (health and dental)

Employee Advances - PAY.311

- Added new index by employee name and date select (all advances for Jan 15th)

Time and Attendance Maintenance - PAY.408

- Time worked enhanced to default date (just like absences) and increment 1 day each enter.
- Description and account DUP from line to line instead of clear to blank each time.
- Show default assignment account from PAY.345 in TIME WORKED header with *** if they have multiple accounts

Create Single Employee Direct Deposit File - PAY.682 **New Item

- New ability to re-create an X member (xjunk) for a single employee based on an existing direct deposit build. This is ideal for situations that you get the banking information wrong. You can correct the banking info for the employee - then rebuild his direct deposit - join just that xjunk member and transmit to the bank.

Create Deduction/Addenda Files for Budgeting - PBF.520 ** New Item

- Assist in excel budget forecasting for staff. Import these additional employee files and use VLOOKUP to master sheet(s) to assist in assessing benefit, addenda, and deduction costs for those items whose rates may change. Build files load the deduction/addenda code (not value) looking both in standard and voluntary.

Sub/Teacher Maintenance - SUB.002

- New Index #9 by Job# - to review records based on SubFinder or TSSI job number as assigned by the sub-call unit. If a record has no job# - it has been created in CIMS.

Search for Available/Appropriate Sub - SUB.305

- For those not using a sub-call system or for situations where you want to replace a person for a specific date(s) - SUB.305 is excellent !!! It knows the skills of the person based on PRO.300 information. It will pull up any/all subs that match those skill(s) and also indicate if they are already working or are blocked.

- If you are not using a Sub-Call system ... you should be using SUB.305 FOR SURE!

Custodial/Maintenance Listing - SUB.995 **Hot New Item

- Currently Maintenance probably uses SUB.999 to view custodial absences/replacement. The new report provides more information and more selection for order of report. Review this new option with maintenance to confirm a potential improvement to their reporting!



BC Specific Items

BCP.820 BC Build SuperAnn Permanent File

- New option in the permanent file to be able to increase pensionable service by the vacation percentage.
i.e.: $\text{service} = \text{service} * 1.04 \text{ (VAC4)}$

BCP.827 BC SuperAnn Edit/Error Listing

- Enhanced to allow Detail/Summary or Errors Only report listing



MB Specific Items

MAN.714 - Teacher Days Taught Reporting

- This report draws off the TRAF records to show total days taught/service for the school year. This is the report to provide/compare to teacher certification.



Notes for IT (cc: H/R)

REGARDING NIGHTLY NETWORK FILE

Brandon and Kelowna have both automated the employee to network process. Each night CIMS generates a file of employee changes based on PRO.300 information. The network program picks up the file (does stuff) - then provides back a file with employee# and email address to be updated automatically in CIMS.

To start initially, appropriate positions are marked YES for download and a complete staff file is created. From then on, the previous day file is compared with current day to establish a 'CHANGE' file for download at IT (changes means change to location, position, fte)

This could have HUGE impact on workflow for both H/R and IT. Right now the paperwork and timing for changes is cumbersome.

REGARDING POSITION CONTROL/MANAGEMENT MODULE

Two school districts (Brandon, Seven Oaks) have been utilizing the Position Control module for several months. Position Numbers have been created, budget has been established, and at each pay a balancing report is now being run to balance H/R PRO.300 lines to payroll AND ALSO pay assignment accounts to Position Management (new POS.997 instead of EIS.997).

Customers see 2 benefits from implementing the new module:

- a) better verification of staffing to budget
- b) better verification of account charging

Call Take Two if you are interested to investigate either of the two options listed above!