




August 2009 - Employee Payroll and H/R Enhancements Summary Release 13.0

There are many maintenance items and nice changes to note in this release. The most significant topics are Employee E-File and Employee Leaves. ALSO – many reports now have format options to predefine the defaults for the report. This is becoming VERY important for Admin Connect users where they want to run say a school configuration but do not want to have to answer all of the prompts. It is important to go through the document and when it says there is now a format option – CONSIDER creating them thinking about Admin Connect users.

For H/R Imaging the following Categories must get created EIS.122 type 'F' for the following (INJ – Injury and accident attachments, HIR – Hire documents, LVE – Leave documents, and INT – Job interviews) .. You must also go into RES.000 and ensure you have access to these categories.

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.

Webinar to review this document with Take Two: **Thursday September 17th, Payroll Session 10:45am** Central Time and **H/R Session at 1:00pm Central**. Mark this date/time in your calendar and plan for your department to get involved.

 **NEW ITEM DOE.900** – This option replaces DOWNEMS ... It will take any CIMS report and drop it to a file so that you can open it in Excel. You would never do this with EIS.995 or EIS.530 as these reports already have a build file option ... BUT ... if it is some other CIMS option that does not have a build file option – then DOE.900 is an excellent utility to take that report and drop it to file EMSTRANS/PDOWNOUT(USERID) so that you can open it in Excel.

ADMIN CONNECT Userids by Position/Location – PRO.100 ** New Item **

The goal was to not have to create and maintain a link between the employee# and AS/400 Userid. We should be able to tell based on your position code, location, and subtype what your ID would be. In that fashion as employees change – this would mean no additional maintenance. PRO.100 sets up for an automatic move to Admin Connect from Employee Connect without having to re-signin. It is some districts' intent that Employee Connect be the primary access point for CIMS Web – as this eliminates Userid and password issues and simplifies launch. PRO.100 can make this happen for you.

Control Access to Employees – RES.000

- New Category expanded to include 'F' employee Folder
- New prompts per category to include user ability to Add,Change,Delete per category. This is all necessary setup to be able to control what folders an employee has access to and what can be done within the category.



CIMS Human Resource Related Items

Employee Accident/Injury Maintenance and Print (EIS.325)

- New 'Nature of Injury' field available to further describe what is the injury (burn, broken bone, bite, strain ...). You can setup injury codes in EIS.163
- New <F2> to view Injury document. District office staff can move injury documents to an employee folder /CIMSEMS/emp#/INJyyyyymmdd.xxx.

Employee Accident/Injury Report – EIS.536

- If accident date is entered as 11/11/29 that indicates that the injury date was undetermined. All reporting will show the word undetermined rather than to print this fictitious date.

Evaluation Type Codes – EIS.207

- There is a new sort field available to change the order that evaluations due appear on the Admin Connect dashboard. By default they appear in evaluation code order. Some districts may want to show teaching evaluations first, then EA's Now you can control it.

Employee Evaluation Maintenance – EIS.327 ** New Item **

- New item to handle evaluations separately from EIS.380. The Indexing and auto-next record or multi-C is available and this option will be quicker to use if you are dealing with many evaluations at once.

Employee Evaluation List format – EIS.460 ** New Item **

- The evaluation listing EIS.560 has quite a few prompts and you use it frequently and differently for different groups of employees. Use EIS.460 to create common formats so that you can recall this when requesting EIS.560 and all the prompts will fill in automatically.

Employee Evaluations Listing/Letters – EIS.560

- If a letter format is selected and Email Evaluators is 'Y' then the evaluator copy puts additional employee location, position and subtype information at the top of the letter
- Added new "Efile" option – If you do produce evaluation letters for employees you can now send the letters to efile so that a copy of the letter will be in the employee folder for future reference/filing

Employee Leaves - Menu LVE000 ** HUGE improvements **

Employee Leaves has been rewritten and re-thought as per discussions at conference and with districts deploying leaves. The product is now quite complete and we feel completely ready to deploy and replace paper! A Leave manual is available – email Take Two to receive a copy.

Major changes with the options:

- PAY.114 Leave Request Types: Originally the system was written to work with authorized employee#'s – that has been changed to CIMS Userid's. Per leave type there can be different authority figures.

- PAY.114 Leave Request Types: There are potentially 3 stages of approval (School Verified, Approved, and Completed)
- PAY.114 Leave Request Types: There is now an ability to exclude dates from selection. Employees asking for a leave on these dates will be rejected immediately. Also there is a new leave request date range which will only allow leaves to be entered between those dates.
- Web Option to maintain Leaves: Handles multiple location people prompting them to complete a leave at alternate site (if applicable)
- New Reporting EIS.538 and EIS.595
- New Payroll Compare to leaves report EIS.564
- New option to eFile the leave form so that a copy automatically ends up in the employees folder

Employee Connect Password Maintenance – EIS.331

- Added new network userid option for signing into to Employee Connect. A nightly job can go out and import (from first class or some other system) the userid and password so that the employee does not have to remember yet another ID and password to sign in.

Employee Information – EIS.380

- Added new ‘P’rint option right from within reference screen that prints a reference profile for the referee. It is expecting an overlay called REFEREE so that you on that overlay can add all of the fancy logo stuff PLUS any additional instructions etc.
- There is a new ‘Cancelled’ to workshop and now on an employee if a workshop is cancelled you will see that beside the workshop for the employee
- In the past, envelopes would not print until you ended from the option ‘E’ from EIS.380. This is no longer true – the envelope will print immediately.
- Previously the system checked for PRO.300 info and assignments to know to delete the employee or not. With districts removing assignments annually – this plan needed a change. The system will now check for all pay history – if an employee has been paid then you will not be able to ‘D’elete.
- Added new “Efile” option – you can send the letter to efile so that a copy of the letter will be in the employee folder for future reference/filing

Employee Roster with History Report – EIS.514

- This is an excellent report to run to show all of your leave people and then within each be able to show selected PRO.300 history to assist in the return process. For this release we added more locations for restrictions so that you can include just those leaves that are to fake/alternate locations (unassigned, tba etc) rather than to include all leaves.

Active PRO.300 Employees Last Paid Report – EIS.516

- Added new select to limit report to just those paid or unpaid. This report is excellent for Sub Teachers or other casuals where you have them in PRO.300 but are questioning whether they have actually worked or not

Employee Report Writer – EIS.530

- Added new items 857,858,859 .. 861 to include the alternate/Group skill rather than the subject. The Group/Alt is used for SubFinder and Eschool for teacher skill if found.

School Configuration Listing Format – EIS.796 ** New Item **

- School Configuration listing is EIS.996 and contains many prompts. Use EIS.796 to pre-define formats and fill in the blanks so that each time you run reports you can select a format and everything will fill in appropriately and automatically.

Mass Update Demog Location and Primary Assignment – EIS.964

- has been enhanced to check both PRO.300 location and work location to compare
- now allows user to select whether payroll location should be updated automatically or not

HR Position/Payroll Assignment Compare List – EIS.997

HR, Finance/Payroll Assignment Compare List – POS.997

- Added ability to predefine formats POS.996 to make that reporting easier, more consistent.
- New Feature to exclude people based certain skills from PRO.300 – If you have 10 month clerks who are no longer being paid but you have them all as clerical in PRO.300 they will all error in the compare.

Employee Letters Formats – PAI.280

- To prepare for efilng of letters – there is a new category code on the letter format. When letters are generated from CIMS this means that in addition to printing the copy for the employee an additional copy will automatically be filed in their electronic file within the category as specified in the format VERY VERY COOL

Employee Letters – PAI.580

- There are two fonts available for letters – right now the standard is italicized .. we could change it to standard ... Review this and let us know!
- Changed logic – If 3 or more assignments print, the letter will automatically page break and begin the letter on page 2. On Page 1 a message indicates ‘Continued’ so reader is aware of the second page.
- New Efile opportunity as described above.

H/R Certificate/Endorsement Listing – PAY.494

- Added position selection. Could always select by PRO.300 line type but this lets you get more specific within any record type group to now also limit to certain position codes.

Employee Information Report – PAY.514

- Added selection to include degrees and/or major/minor codes to report
- Added new ‘Applied on/after’ date field to limit the report to applicants who applied since a certain date

Employee Seniority List – PAY.520

- Added additional assignment status selection fields as some districts using quite a few
- Changed the file build for date to include YYYYMMDD so they will appear in a format more readily accepted by Excel.

Mass Email Message to Employees – POS.525 and PRO.525

- Added a second page – prompts to allow email to in addition to the front screen send a copy of this email to a distribution list and/or to up to 4 additional employees
- ** If you are not using CIMS email to communicate payroll related info to staff – you need to learn about the advantages as it is a wonderful tool **

Define Short List Codes for Job Postings – POS.217 ** New Item **

- The Short List field has been around forever. Now you can use POS.217 to define valid short list codes to be used when shortlisting. Make sure to define all of the ones you are currently using in order to successfully be able to go into existing records without ‘beeping’ invalid.

Define Rating Codes for Job Postings – POS.218 ** New Item **

- The ratings field has also been around forever. Now you can use POS.218 to define valid rating codes to be used when interviewing/rating potential staff positions. Make sure to define all of the ones you are currently using in order to be able to go into existing records without ‘beeping’ invalid.

Job Posting Maintenance – POS.220

- Added new <F16> to access attachments for job posting interview results per employee. Interview results will be posted in the IFS within /applicant and be called xxxxxxxxxxxxxxxxxxxxxxxxxxINTRE.zzz (where x=employee#, y=job posting reference#)
- Added new flexibility to categories to indicate whether category is required to be answered and/or if multiple categories can be selected for the job posting applicant.
- Incorporated new short list and rating code validation
- Added a new flag to be able to exclude the job posting from being visible for Admin Connect
- Keep in mind that in addition to the Admin Connect flag – it is start date that determines whether the posting is visible to Admin Connect.

Job Posting Summary Report – POS.527 ** New Report **

- New report producing a summary of job postings by posting# or deadline date – shows posting status and summary of #applicants, #withdrawn, #short listed and not short listed, and #received interviews so H/R director is aware of activity and status of postings.

Mass Print Job Posting Reference Forms – POS.528 ** New Report **

- New report that takes a job posting and runs through all applicants and produces reference checklist forms per applicant per reference. This can be done in EIS.380 for a single person or use this option if you want to prepare worksheets for all of the reference checks. The print is expecting an overlay REFEREE which should contain all of the word like details attached to the reference process.

Workshop Maintenance – POS.320

- Added new status code H – attended half of the whole day workshop
- Now audit who added the employee to the workshop (can tell the difference between a web entry and one done in HR on behalf of an employee)
- New restrict applying to a workshop based on an employee’s PRO.300 line type. If you are not active in that position type during the month of the workshop you will not be able to apply to take the workshop and the workshop would not even appear to you on the calendar.

- New keywords searching fields added to workshop. People in Employee Connect can do a keyword search to limit the workshops that are listed based on keywords entered (and their position restrictions if applicable)
- Added new cancellation date for workshop so that you can cancel the workshop and have it shown as cancelled on web products and to attendees. Cancelled workshops will not appear on open listings and will show up in Red
- Currently workshops POS.320 has no restrictions to specific users, ie: if someone has access to this option they have access to all workshops. With program switches and in naming workshops we can restrict workshops to different departments - Professional Support Services, Special Education, Building Department, Child Guidance.
- If you are 'R'egistering employees into a workshop, new warning 'reached the maximum'

H/R Position Table Report – POS.501

- Removed start and stop dates from report (irrelevant) and added a variance column (Budget – Actual) to help see the differences more easily.

Budget Program Summary Listing – POS.505

- There is a new Secondary Summary feature to this report based on Program codes (EIS.157). This means that your 1-primary tabling would be by budget code and then you can now define a more general rolled up summary 2. In 1 report you could have 4 columns for teachers – regular, grant, French immersion In the #2 sort you can roll them all up to the same column.

Workshop Hours/Account Detail Report – POS.542

- Added new 'H'alf day to selection/status
- Report now excludes all cancelled workshops

Employee Workshop Schedules – POS.543 ** New Report **

- New report to select a workshop or workshop date range and workshop schedules are produces 1 employee per page (shows all of the employees activities for that time period) VERSUS 1 employee per page per workshop – excellent to give out as registration

Compare Workshop attendees vs. Sub Absences recorded SUB.002 – POS.564

- Excellent report to confirm what has occurred between the entered absence and the workshop scheduled for an employee to confirm an absence has been n 6cm what has occurred
 - Rexcellent t5H'alf day tlf002 Tw -27hadrred



CIMS Payroll Related Items

Time and Attendance Listing – PAI.501

- Corrected to print total even if grand total is less than 0

Employee Time Absent/Worked Detail Listing – PAI.502

- In the past people would run this option wide open, ie: all staff and all absence history – output would max out and hang the system ... Resolved. Now user must input something in order to ENTER through the option (or F12 to cancel)

Find me who – Absence Report – PAI.504

- New ##### selection added to reason to be able to look for anybody with an absence code and blank reason
- Enhanced to allow for FTE sensitive Y or N. If you are looking for anyone with say more than 20 absences and indicate FTE sensitive Y .. it will include the half-time employee with more than 10 absences.
- Added new “Efile” option – you can send the letter to efile so that a copy of the letter will be in the employee folder for future reference/filing

Employee Absence Liability List with PAID – PAI.512 * New Report ****

- Similar report to the liability report PAI.509 but this report includes both the absence bank and added pay information
- A file is also automatically built

Payroll Account History Report by Account – PAI.516

- Enhanced to allow ‘Summary by Employee’. In the past this report produced full details per employee or just total summary for the account. Now with this new select you can get detail by account but summarized by employee *** Great enhancement

Payroll Processor – PAI.600M

- Removed Printing of the following reports OPAI6541, OPAI6542, and OPAI6543. This was discussed at conference and all payroll people wanted them gone as they are duplicate information that exist in better format within already printing OPAI6251,2, and 3.
- Adjusted processing logic so TEACH pay adjustments will adjust @SERVC and work identical to a dock.

Oops, Payroll ran as cheques when I really wanted Direct Deposit – PAI.606 ** New **

- It happens to the best of us! This is a new option to rebuild a direct deposit file for a payroll run where the run was originally entered as cheques by mistake. The cheque numbers will remain eaten and directed as PAYCK ... but an additional direct deposit member XJUNK is created or overwritten to contain the appropriate pay run information.

Employee Advance Payment Maintenance – PAY.311

- Can no longer 'P'rint/post a cash advance. Create the advance in PAY.311 and then process (even if it is a single) by running a payroll (Process Cash Advances Y)

Auto Build STAT Addenda from Previous Pay – PAY.344

- Has been enhanced to allow penny timecards to be created along with the addenda item which is very helpful for the Casual Payroll.

Employee Absence Code Grid Listing Format – PAY.496 ** New Item **

- New option to define and maintain standard formats (screen defaults) for PAY.596 absence reporting

Mass Email Message to Employees – PAY.525

- Added a second page – prompts to allow email to in addition to the front screen send a copy of this email to a distribution list and/or to up to 4 additional employees
- Added new select to email based on Addenda Code

** If you are not using CIMS email to communicate payroll related info to staff – you need to learn about the advantages as it is a wonderful tool **

Absence Code Profile (Total, Average, Perfect, List) – PAY.598

- Enhanced to allow position code select
- Added absence reason code selection

Employee Time Worked/Missed Detail Report – PAY.592 new PAY.792

- Added new format definition for PAY.592 reporting. Format definitions are then available to end web-users and for green screen users to be able to run the right report without having to know all of the parameters.

Mass Build Time Card Entries from Field Trip Records – PAY.818 ** New Item **

- Fabulous new option that will mass add timecards based on completed student field trip records with employee defined drivers. Drivers must be defined in TRN.001. It utilizes the trip time specified and builds for whatever date range requested. The wonderful part is now the actual field trip data is showing on the timecard records and accumulating all of the detail into history.

Mass Inactivate Stale Employees and/or Assignments – PAY.975

- Added prompt to allow you to change Exit Status and Location Code (front screen) for employees that get inactivated
- Added prompt to allow you to wipe out email address for inactivated employees

Substitute Monthly Summary Report – SUB.990

- Corrected and error/enhanced so that calculation of consecutive dates works effectively even counting over Christmas break and Spring Break. Previously it would not catch the long term rate over extended vacation time periods.

SFE (Eschool) Mass Remove OTH Date – TSI.901 ** New Option **

- For Eschool customers – this option needs to be run in summer to mass delete SFE “OTH” or expiry dates for EA’s and then add the new/next June date with the regular TSI.ALL load.

SFE (Eschool) Mass Delete Classification Codes – TSI.902 ** New Option **

- New option to mass delete all CAS/SUB classification codes from SFE. This should be done every summer to clear all codes so TSI.ALL will load new classifications and dangling ones will be gone.



BC Specific Items

SuperAnn Maintenance and Transmission File - BCP.820, BCP.830

- New option to re-build record for an individual employee. If you have made a mistake, you can delete that employee and then rebuild for that employee
- The format had changed in January so CIMS has been updated to handle that new format

EDAS / BCPSEA Data Transmission Build – BCP.860

- Take Two continues to make minor adjustments to the build file based on BCPSEA requests for changes. Since the original programming there have been over 200 modifications. The good news is – limited changes in activity or workload to Payroll and the file is processing clean and ready for export.



MB Specific Items

Build TRAF TCH Monthly records – MAN.828

- Added new error report for records where contract salary is at or over \$150,000



Sub Records Process

Support Staff Maintenance – SUB.001 and SUB.002

- Now disallows for invalid accounts to be specified. If an invalid combination appears – the user must leave the account blank (for the absence code to update) or input a valid account

Support Staff and Sub Listings – SUB.997/8

- Now shows date and time that report was run on the heading of the report.



Employee Connect - Web

- New Leave Request <tab> added for employees to request a leave(s), track approval of leaves, and view history of leaves taken. This should totally automate the leave paperwork.
- If employees are allowed to see the directory they can now directly send an email to any other employee from the directory tab
- CAS/SUB availability enhanced to allow the SUB to input they will be unavailable to work for XX days
- Better control from District of what appears on employee connect (address, email, phone#) – new Yes, No, Omit allowed within PAY.324
- New <Admin Connect> and <Teacher Connect> launch now available directly from employee connect meaning employee does not have to resignon to those products with the different Ids.... Uses table PRO.100 VERY VERY COOL for typical users!!
- Enhanced address/phone changes ability so that if employee has change access they cannot blank out the information and <save> ... information must exist! Also do better validation for correct phone number format and postal code to eliminate user inputting bad information
- Workshop calendaring and search features were enhanced from Employee Connect so that users have a <search by keyword> and can in list format see all of the workshops available without having to flip through the calendar view.
- In main employee screen – warning message appears if no emergency contact information exists for that employee. The purpose of this is to encourage them to go to the emergency tab and add contact information so that the message disappears.
- If employees are adding attachments (eg: Do a leave and add an attachment) – it will restrict them to a 3Meg max