



November 2011 - Employee Payroll and H/R Enhancements Summary Release 16.0

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: **Tuesday November 15th, 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

Email Programs rewritten

- All email options in AdminConnect and within CIMS regular have been rewritten to use Coolspool rather than regular as/400 email. This will improve on performance and reliability. At the same time we are now logging emails sent to be able to qualify that yes certain email had been sent at least to the mail server for distribution.

Automatic Jobs to consider

- AUT316 – Email administrators who have not reviewed their leaves. Some customers have as low as one day and as many as 3. If you are doing leaves – this feature tops it off in ensuring administrators are handling them.
- AUT320 – If you have a district calendar (outlook, SharePoint) consider refreshing everyday with CIMS Workshops so that all staff are aware of all staff events and activities without having to manage it in two places.
- AUT331 – Excellent NEW program that will auto-generate EmployeeConnect random passwords every night. Looks at any A? line (Current and future) and generates a password for their EC access. With the ‘forgot my password’ feature this means employees can automatically gain access without any manual effort.

Summary of Special Features:

- Rewrote Email and now log all email sent. Also many new selects in the email ... look to all PRO.525, PAY.525, POS.525
- Letters – you can now email to distribution lists
- Significant new feature in Payroll for additional reporting and downloads



CIMS Human Resource Related Items

Create District Distribution Lists from CIMS HR – PRO.150 **NEW

- It is a nightmare for IT to manage distribution lists so let CIMS. Create your distribution lists in CIMS using the new PRO.150. Then every night files get built (detail, summary) that gets sent to Active Directory to (delete existing group, create new group) based on today’s employees as defined in PRO.300. This is a HUGE step forward!

Control Access to Employees – RES.000

- Added new 'Index by folder to easily see Restrictions set to a folder – all people

Folder Categories – EIS.122

- New Index of User restrictions by folder category – makes it easier to confirm what users have access to a particular folder
- New Management folder Y/N within folder definition. This is really just a way in definition to confirm this folder should be treated as confidential. This field does not affect access.

Web Bulletin Board Messages – PAY.325

- Added ability to restrict down to the Sub Type (PRO.300)
- Added ability to restrict bulletin board message to category and category value (e.g.: Just brand new staff)
- Added ability to restrict by job code, deduction code(s), addenda code(s)
- IMPORTANT: Added new Effective date so you can post a message and it will be visible only to people with an Active PRO.300 line for the date specified. (Handy in Summer and when wanting to direct messaging based on September)

Maintain Web Form Definitions – PAY.328 / Report PAY.558

- Added selection for employees in a workshop. This can act as your RSVP for workshops that are pre-assigned and you want employees to indicate YES I am coming.
- Changed date logic. If you restrict your form to a PRO.300 line it looks to the form effective date range to select which PRO.300 Active line to include (not just those who are that today – but will be based on the form date range).

Maintain Web Deduction/Benefit Information Tab – PAY.327 **HUGE NEW OPTION

- New option to define a web page (tab in employeeconnect) of deduction and benefit links and information. This information will appear in EmployeeConnect and custom for each employee according to what benefits, deductions that the employee has. HUGE POTENTIAL.
- Ability to view up to 5 attachments per benefit code (if attached)

Employee Leave Request Maintenance – EIS.316

- New date range selections for Indexes and defaults to current school year. This will assist in filtering on requests between a date range

Employee Leave Request Report – EIS.538

- New sort by request#
- Added new selection for particular days/hours

Employee Leave Request Committee Report – EIS.539

- New selection for current year or old year budget
- New selection to exclude non-budget (excluded) items
- New download file option

Employee Leave Request Expense Report – EIS.540 **New Report

- New option to produce a details listing of expenses and estimates for PROD type leaves. It subtotals per employee and shows estimate, actual, and excluded amounts.

Monthly Calendar View Leaves Totals – EIS.595

- New totals added by leave type so you can see daily numbers and grand totals

Build P/O Requisition/Advances from Leave Requests – EIS.910

- New option to limit build to leave type and to override account charges

Employee Email Address Maintenance – EIS.332 **New ITEM**

- Allow someone to maintain JUST email addresses (main and alternate). Districts provide this option to IT so that they can maintain this information without having full edit access to EIS.380

Employee Workshops – POS.320

- Added new applicant status of X – emp attended but did not complete.
- HUGE: For those struggling with knowing what to number the next workshop – as you come into the option it displays the last workshop ID number (saves you from Indexing and going to the bottom to find the last used number)
- Made the indexes smarter to only show those workshops associated to your restriction, i.e.: if you are in the WPSH option only those workshops starting with WPSH will appear.
- New Prompt Cover Cost of Sub. This flag will be used in emailing to the employee ‘Book Sub if required. Sub Costs not covered by workshop’ ... or if it is Y and appropriate is covered message. The default is blank which means no additional message emailed to the employee. If you want it clearly stated make sure to define either a Y or N.
- Disallow name to contain \, etc. as “bad” characters will cause problems with attachments

Mass Add/Copy Applicants to a Workshop – POS.565

- New Report Only Option Y/N so you can see what may happen before auto assigning people to workshops
- Smarter selection. You can ask for all those with effective AT, AS history (currently active) and missing or expired Required Documents (e.g.: Everyone whose REQDOCS HARASS has expired).

Build Certificate/Endorsement from Workshop – POS.561

- If endorsement is autobuilt – we are now putting the workshop code and title in the notes field so you are aware of what this endorsement was based on.

Mass Change Workshop status based on Web Form Response – POS.567

****NEW ITEM****

- This completes really the RSVP Process ...
 - Auto-Assign a workshop to staff (variety of ways)
 - Assign a Web form to everyone in the workshop PAY.328 and await their response
 - Use POS.567 to change appropriate status depending on the response

Job Posting – Short List Codes POS.217

- New prompt on Short List Code to – Allow AdminConnect Users to attach interview document. For those districts ready to receive these details electronically – admin can now browse/attach interview documentation right from applicant selection screen.

Job Posting Maintenance – POS.220

- Changed Auto Shortlist option from Y/N to definable codes.
- Enhanced the Exclude from AdminConnect to Y/N/D – D meaning exclude the posting from appearing to AdminConnect until deadline date. Reminder that Exclude from AdminConnect means the entire posting .. ShortListing means showing who has applied to the posting.
- Allow choices as to whether you need a general cover, job specific cover letter – or both.

Job Posting Screen Worksheet – POS.520

- Added option to exclude non-shortlisted so that you can produce a report of only those that have been shortlisted without listing all of the possible short list codes. This report is available in AdminConnect and defaults to Excluded Y so they do not see the entire list of applicants – just those shortlisted.

Job Posting Letters – POS.522

- Added option to Exclude Hired .. so you can run letters ‘Thanks for Applying’ and efile them directly to employee folders without having to manually remove the hired person.
- Added **SIG logic to include automatic signatures to letters

Job Posting Consideration – PAY.324

- Some HR departments are fielding calls from employees using JobConnect – I cannot change my name or my email address or teachers certificate number. In the new release of JC we have grey colored those fields to help highlight them thinking they will understand that those pieces of information are not changeable. What may also help is districts adding a message in PAY.324 for JC-0002 that Indicates: If you are an existing employee – you cannot change Name, Email address, certification information. Contact Board Office

Basic Employee EIS.301 and EIS.380

- Added email validation to ensure address is grammatically correct. There must be a period, must be an @, cannot be a ;. Bad addresses cause mass emails to crash so it is our intention to ensure addresses are now correct upon entry/save.
- In evaluation tab an F2=View Evaluation is now available. Previous to this release it indicated evaluation onfile – now it will pull up the document.
- In Job Posting tab the view attachments is now available even in Lookup mode
- In Job Posting tab the listing of applied to jobs for an employee will also show which postings the person has been hired into (was awarded).
- NEW Employee Folder status category (FLRSTS) available from front screen to identify the status of the employee folder type (paper, electronic) and then status if paper (archived, destroyed)
- Added new Hold Y/N prompt for letter ‘P’rint. If you will be emailing additional copies to distribution list indicate Hold Y so that you can initiate an EME.900.

H/Position Information – PRO.300

- Now checks that from date is less than to date (bad dates)
- Changed initial summary view to show both status code and leave code if both exist for the same person/same record. Shows XX*YY example: if status=MED and leave type=EXTEND it will now show ME*EX ... it used to just show the one = EXTEND

Employee Report Writer EIS.260/EIS.530

- Removed width, length and LPI fields and replaced that with more user friendly portrait versus landscape selections. System will figure out an appropriate CPI based on number of fields and orientation.
- Added new item #89 – direct deposit/email flag
- Added new items #111, 112, 113, 114 seniority hours for years 2011, 2012, 2013, 2014
- Added new item #121 – alternate email address
- Corrected print for showing F2 additional pay/rate lines. It was not producing appropriate information
- On last release EIS.530 was adjusted to automatically build file Y ... but ... in the build file Y any date fields were formatted to M/D/Y rather than the more friendly May 7/2011. In this release build file has been changed back to 'N' as default.

Employee Roster/FTE Listing – EIS.995

- Roster previously did not print both status and leave type (showed only 1). Now – if there is both status and leave codes on a person it will show STAT**LVEC .. There was not enough room for both codes so it is a short version of each code 4**4.
- If you use the until further notice date 11/11/29 report will print UFN rather than print the date itself.
- Work Location Y now fully assumes the work location for print/sort, etc

Email CIMS report – EME.900

- New prompts for Subject and Message so user can setup the email nicely without having to email it yourself first
- New prompt for Indent to the right. This defaults to a ¼” as most items will email better moved over. However – if you have wide reports or are sending a contract or anything with overlay and designated text – you will want to indicate 'N' so the text does not shift.
- New feature to email to a distribution list (POS.216). The goal here is to eliminate paper copies of many of the employee letters.
 - Use EIS.380 to 'P'rint the letter and efile Y or hold Y
 - Use EME.900 to 'I'ndex for that document and email to appropriate other people/groups



Employee Letters – PAI.280/580

- New SE? format will include more employee information specifically certificate#, phone numbers, email address (same as ET?) PLUS seniority date/number (if not blank)
- New ability to send employee notification to employee at same time letter is efiled.
- Reminder: Red Alert also occurs in EmployeeConnect for employee to view document

- Reminder: We can add automatic signature to letter – just require .jpg of signature(s) to select.

Mass Email Employees/Job Postings/Workshops – PRO.525 and POS.525

- Rewrote option to new Communicate which means more reliable email, longer message, and can format message with HTML.
- Now logging all email sent – date, subject, email address sent. Can utilize PAY.526 to check on previously sent items. It will not log that person has received it .. just that you sent it.
- Reformatted screens for better flow and be more easily readable
- Changed return email to email address
- Now validates email addresses at sending out and will indicate in the report which email addresses were BAD hence email not sent out. Important to have grammatically correct email addresses and to not use the email address field to say input two email addresses!
- GREAT new option to be able to send to both regular and/or alternate email address
- New ability to email based on Web form and response (i.e.: email all those who have not yet responded to form ABC)
- New ability to email based on employees with missing or expired

Position Control Skill/Program Variance Report – POS.998

- Excellent report to identify potential incorrect/badly matched position numbers. This will compare the position# definition details with the skill indicated to confirm they are consistent.

Employee Evaluation Listing – EIS.560 * GREAT IMPROVEMENT****

- Changed Email for Evaluators to ‘Email List to Evaluators’. If you select to Sort by ‘E’valuator and Email Y in addition to your reporting and/or letters CIMS will automatically burst the report and email per evaluator.

Absence Code Profile – PAY.598

- Added prompt for number of days and added % percentage based on this
- Added additional selection to show details only for employees with absences GE x
- Added build file option for details ... HUGE potential on multi-year absence reporting. Can run in multiple years – add year column and append information – then pivot like crazy!

Display Employee Document/Image Log – IMG.301E **Excellent Feature

- New ‘Access History’ selection which will display the history of access for that employee’s image (who viewed, when)



CIMS Payroll Related Items

Employee Time Absent/Worked Detail Listing – PAI.501

- New additional report is included in summary (one line per employee). The goal is to help with identifying overtime hours people – harder to assess when looking at all of the details.

Payroll Account History Report by Account – PAI.516

- New select by pay type to filter the report further to only accounts related to certain types of pay.

Payroll Processor – PAI.600M

- Warnings report now gives warnings for any employee with CPP, EI, or Tax turned off (at master or assignment level)
- Payroll compare reports are now e-filed when an actual is processed with comparisons
- Absence dock list (OPAI633A) now line breaks with subtotals between absence codes

Payroll Run# History and Register Image Lookup – PAI.609

- Added additional details to view - #employees processed, less docks, adjusted gross, less deductions, employer contributions and net so you see all that information front and center – same as OPAI620.
- Only show function keys for available PDFs, i.e. if there is no cheque register then F9 will not show
- Added function keys for payroll compare reports
- Reminder: With a map drive setup – payroll can scan/store additional paperwork with the image history (e.g.: scanned timesheets) ... Use PAI.609 to <copy><paste> the name!

Build Retro Download File – PAI.642 ****New Option****

- Incredible new option to create your own retro files (Take Two assistance no longer required). Select period date ranges that could span any number of years back (up to 4 different ranges) and choose to include whichever additional pays. This builds a file for you to download and work with to eventually create your retro value and re-upload to CIMS.

Payroll Deduction Register Listing – PAI.804

- Updated the download file to include the deduction codes, benefit code and addenda code used for the employee to build the totals

Payroll ACCUM Listing – PAI.805

- Added the employee's CPP, EI and Income Tax flags to the report next to the summary totals so that they print on the summary and the detail report.

Display T4/T4A Master PDF files – PAI.801 ** New Option ******

- When you process T4 and T4As now you can also e-file a master of all the T4s/T4As in the file to a master which is viewable through this option. The option tracks when the job was processed, by who and for what job codes.

Full Assignment Listing – PAY.565 **Great New Feature******

- New Build File option that builds one record per employee assignment/account distribution and contains all of the important things (FTE, Grade, Step, Account distribution, deductions, benefits, addenda). It has built in smarts to line up all of the common deductions and benefits in columns so it is easy to identify people without those deductions.

Auto Build ROE Termination Records – PAY.716

- Change default on STAT Pay to 'N'
- Changed default on STAT PAY % to 0

Report on Hire for Service Canada – PAI.720 *** New Report/File******

- New File for Service Canada Import of hires. To date Portage la Prairie and Brandon School Division are reporting (far as we know).
- Enhanced report to show total number of employees as Services Canada on upload confirms number of staff.

T4 Web only Audit Listing – PAI.832 **New Report******

- New report to produce an audit listing of employees who have requested their T4 as electronic only (T4WEB category of Y). It will identify those who have said Web Only Y and have not viewed their document online.

Annual Salary Report – PAY.340TC

- Enhanced to include current F2 = Additional rate Lines in annual salary

Time and Attendance Maintenance – PAY.408

- New 'P' option available to be able to change a timecard pay period end date without having to delete and re-add
- New 'Limit to only Period End' _____ so that on the regular Index #1 to view all the timecards you can now restrict to a particular pay period end date (eg: find adjustments)

Mass Email Employees – PAY.525

- Rewrote option to new Communique which means more reliable email, longer message, and can format message with HTML.
- Now logging all email sent – date, subject, email address sent. Can utilize PAY.526 to check on previously sent items. It will not log that person has received it .. just that you sent it.
- Reformatted screens for better flow and be more easily readable
- Changed return email to email address
- Now validates email addresses at sending out and will indicate in the report which email addresses were BAD hence email not sent out. Important to have grammatically correct email addresses and to not use the email address field to say input two email addresses!
- GREAT new option to be able to send to both regular and/or alternate email address

Auto Build Stat Pay – PAY.544

- Great enhancement to be able to build STAT based on average hours, i.e.: you select a date range to include and it calculates the average daily hours for each employee to include in the stat pay (e.g.: Bus Drivers who with field trips work inconsistent number of hours)

Employee Pay/Deduction Profile – PAY.563 **New SUPER Report

- Rewrote report to allow full date range (multiple years), and show all pay and deduction information in summary and/or detail. This is a perfect report for final adjustment calculations.

Vacation Planner Calendar – PAY.594 **New Report

- New report to show Employees and absence accrual/balance totals and then a monthly calendar to detail out absence dates. We wrote this for maintenance and Vacation so staff could get their next year vacation entries complete in Sub Records and then be able to report on this with PAY.594 to reduce all of the manual Excel work.

Mass Build Time Cards from Field Trip Records – PAY.818

- Added additional job code select. System will check for the primary job code and then alternate to create time card records to the appropriate Job Code for that person (BUS and BUSCAS for instance)

Employee ROE History Maintenance – PAY.821

- Now allows for last pay date to be changed

Mass Inactivate Stale Employees/Assignments

- Added selection for a single employee
- Added options to clear seniority number, T4Web Category, and/or absence banks
- Districts should consider running this option at least annually.



BC or MB Specific Items

- Nothing to Report



Sub Records Process

Substitute/Teacher Maintenance – SUB.001 and SUB.002

- Now allows for a 995 (Floater) to be used multiple times on a single date (many schools). AND you can input floater as Employee# - as it makes it easier then to add the Sub to that record.

Copy Support Days worked to Timecard – SUB.501

- Enhanced duplicate line message to include the duplicate total so you can easily see if it is greater than 1 or OK due to smaller assignments.

Sub/Teacher Listings SUB.997 and SUB.998

- VERY NICE enhancement to show the workshop and its absence code/reason defined on the report for those people marked missing that day in Sub that are assigned to a workshop that day.

Sub/Teacher Listing Board Office – SUB.996 and SUB.999

- New Summary Only option to exclude all of the detail and provide just final numbers – total worked, total absent, and a breakdown of absences by type.