



Human Resources Overview HR_200



Course Content



- Overview
- Unit 1 - Organizational Management
- Unit 2 - Personnel Administration
- Unit 3 - Time Management
- Unit 4 - Payroll
- Unit 5 - Reporting
- Terminology

Learning Objectives



- Obtain an overview of the various components in Human Resources management at UK
- Understand the organizational elements & structures of Human Resources
- Gain insight to the UK payroll process and functionality
- Understand how the process integrates with other IRIS functions
- **Note:** Units 2, 3, and 4 have a Check for Understanding exercise at the end of each unit. Instructions are provided on the following slide.

Check for Understanding Instructions



- Click **Attachments** (upper right corner)



- Click **HR_200 Check for Understanding**

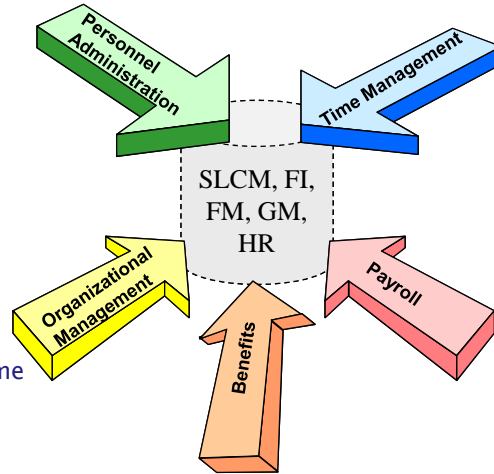


- Print the **HR_200 Check for Understanding** pdf
- Use the pdf to note the answers to each question as you finish each unit
- Enter answers on the Check for Understanding Exercise at the end of the presentation

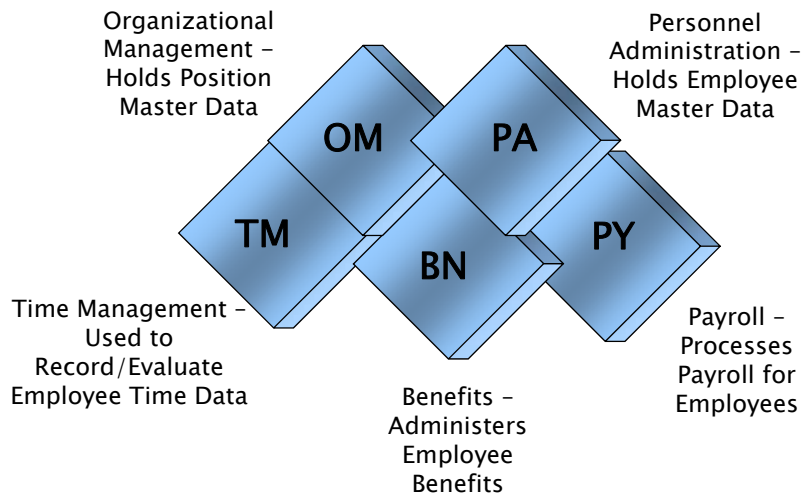
Integration Across IRIS



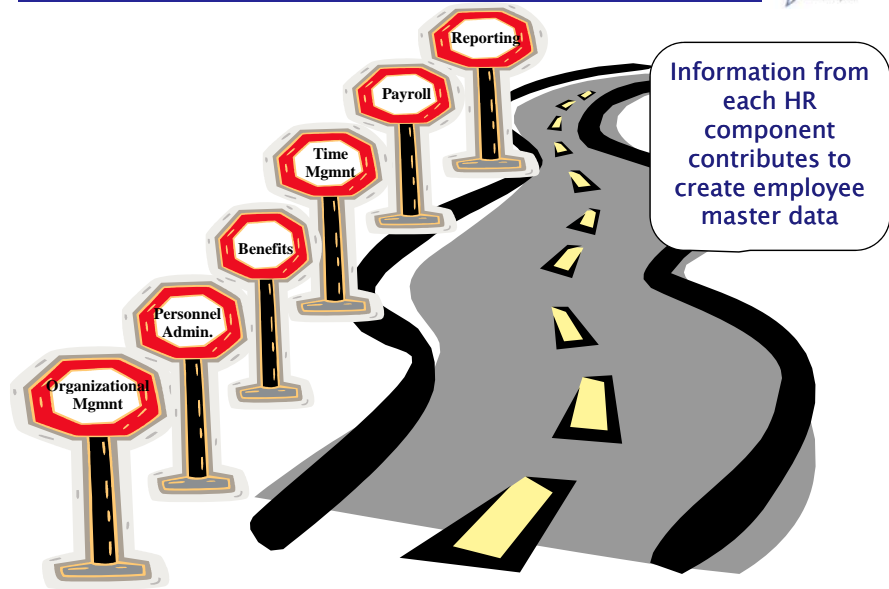
- HR/Payroll data integrates with other IRIS modules
 - ♦ Employee ID is integrated with Student ID
 - If a student is also an employee, the Student ID and the employee Person ID will be the same
 - ♦ Changes to an employee's master record may affect salary/benefit encumbrances in FM
 - ♦ Payroll is charged to cost objects in FI and GM
 - ♦ PPD/Housing employee time is transferred from Time Management to PM Work Orders



HR Components



HR Master Data Life Cycle



IRIS Data Types



Human Resources & Payroll Data includes:

- Master Data
 - ♦ Organizational Management
 - Includes information about the Org Management structure
 - Example: Organizational Unit (department)
 - ♦ Personnel Administration
 - Refers to employee information
 - Examples: Salary or hourly pay rate; cost distribution
- Transactional Data
 - ♦ Entered as needed to support IRIS updates to master data
 - Examples: Time entry

HR Security Roles



- In order to access HR transactions, you need:
 - ♦ To successfully complete this course
 - Access to certain transaction codes may require completing more than one course
 - ♦ To be designated as a HR user and have an approved training plan
 - ♦ To sign the Statement of Responsibility (SOR)
 - Instructions available at: http://www.uky.edu/IRIS/train/SOR_Information.html
 - If you have signed the SOR in UK_100, you do not need to sign it a second time
- If you do not have access, please work with your Business Officer to get this access assigned

HR Security Access



- Access to employee master data and to certain transaction codes will be based on your HR security role in the IRIS system, for example:
 - ♦ If you are responsible for creating faculty and temporary positions in your department, you will have access to your department position data and the position transaction codes
 - ♦ If you are responsible for creating and maintaining employee data in your department, you will have access to the employee master data for your department and employee master data transaction codes
 - ♦ If you are responsible for entering employee time, you will have access to the employees in your department and all of the time entry transaction codes



Organizational Management (OM)

Unit 1 – Organizational Management

- Organizational Management (OM)
- OM Object Type
- Foundation Structures
- Jobs vs. Positions
- Integration Point – Position
- Relationships

Organizational Management Objects

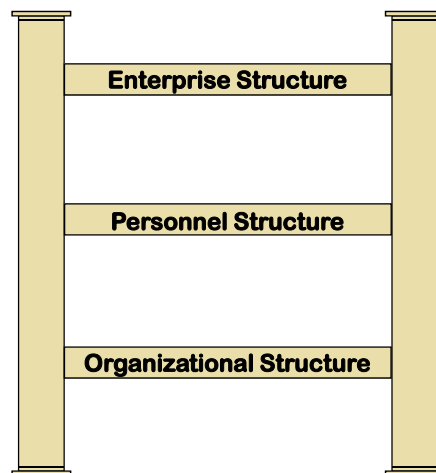


- Create and maintain the structure of the organization in the system
- Allow classification according to features and types of information and arrangement into categories
- Link objects and establish relationships and inheritance of attributes
- OM Objects include:
 - ♦ Organizational Units, such as Housing, Biology, College of Nursing
 - ♦ Jobs, such as Regular Faculty, Part-Time Faculty, Coach
 - ♦ Positions, such as Staff Support Associate I, Professor, Student/Non-Work Study

Foundation Structures



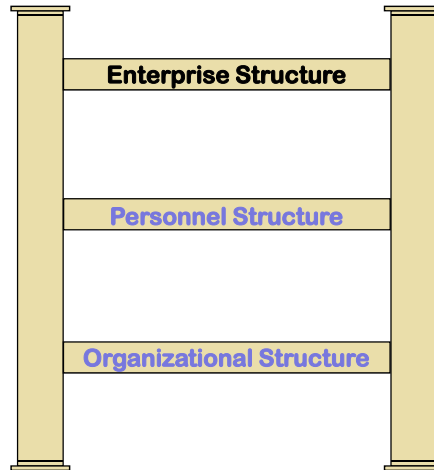
- There are three structural concepts within IRIS that are used to build the HR view of an employee:



Enterprise Structure



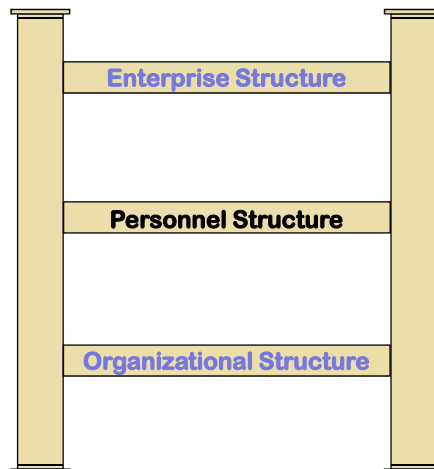
- Provides reporting attributes
 - ◆ Company Code
 - ◆ Personnel Area
 - ◆ Personnel Subarea
- Provides default values for data entry, selection criteria for reporting, and authorization/security verification data



Personnel Structure



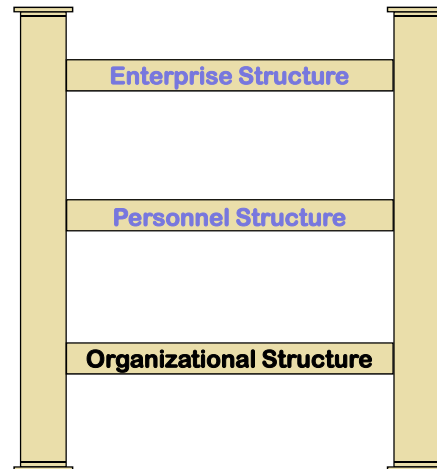
- Defines employee type
 - ◆ Employee Group
 - ◆ Employee Subgroup
 - ◆ Payroll Area
- Provides default values for data entry, selection criteria for reporting and authorization/security verification data



Organizational Structure



- Defines the hierarchical relationship between OM objects
 - ♦ Organizational Units
 - ♦ Jobs
 - ♦ Positions
- Provides a comprehensive and dynamic model of UK's structure that serves as the foundation of OM



Job vs. Position



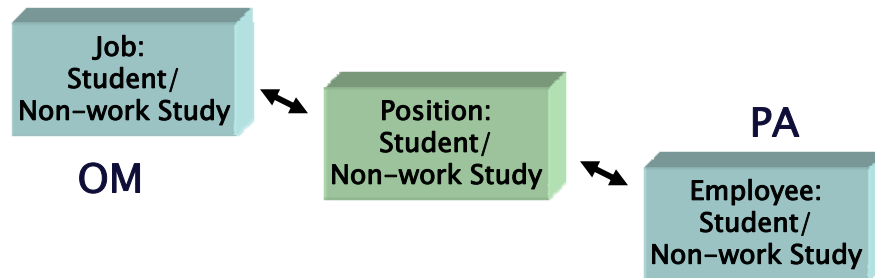
- Job
 - ♦ Created/maintained by Compensation only
 - ♦ Provides general classification of tasks routinely performed together
 - ♦ Establishes EEO category, job group, and census code
- Position
 - ♦ Created/maintained by Compensation (regular staff positions) and Business Officers (faculty, temporary, and student positions)
 - ♦ Inherits attributes from Job
 - ♦ Assigned relationships with a specific department and (unless vacant) specific employee(s)



Integration Point – Position



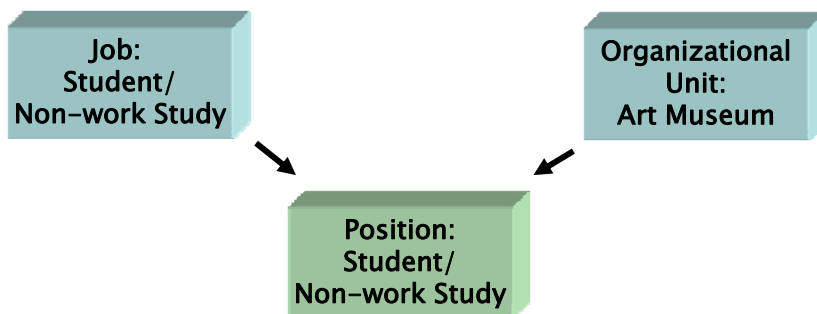
- The integration point between Organizational Management (OM) and Personnel Administration (PA) is the position



Relationships



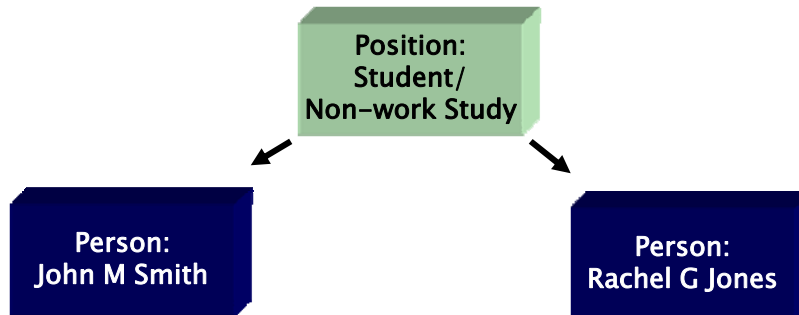
- Positions are assigned relationships to:
 - ♦ A Job which describes the EEO category, job group, and census code
 - ♦ An Organizational Unit which defines the reporting structure as a one-dimensional hierarchy



Relationships



- Positions also have a relationship to:
 - ♦ A person or a pool of people who “hold” the position
 - Relationship record automatically added by IRIS when a hiring action is created using the position



Unit 1 – Check for Understanding



Please choose the best answer:

- Organizational Management objects...
 - ♦ Create and maintain the structure of the organization in the system.
 - ♦ Allow classification and arrangement into categories.
 - ♦ Link objects and establish relationships and inheritance of attributes.
 - ♦ All of the above.
- **True or False:** The integration point between Organizational Management (OM) and Personnel Administration (PA) is the position.



Personnel Administration (PA)

Unit 2 – Personnel Administration

- Personnel Administration (PA)
- HR Master Data
- Infotypes
- Validity Dates
- Accessing Employee Infotypes – PA20
- Person ID & Personnel Assignment Number
- Displaying Infotypes
 - ◆ 0000 Actions
 - ◆ 0002 Personal Data
 - ◆ 0001 Organizational Assignment
 - ◆ 0006 Addresses
 - ◆ 0008 Basic Pay
 - ◆ 0041 Date Specifications
 - ◆ 0094 Residence Status
 - ◆ 0007 Planned Working Time

Personnel Administration



- The Personnel Administration (PA) component is used to:
 - ♦ Process employee data
 - ♦ Maintain employee information



HR Master Data



- Master data may be displayed using the PA20 transaction code
- Master data changes, such as an address change or a cost distribution change may be made using the PA30 transaction code
- Personnel actions, such as hiring a new employee, changing an employee's position, changing base salary, are entered into IRIS using the PA40 transaction code



Infotypes (IT)



- The personnel master data, time management and related data fields are grouped together on Infotypes (IT) according to logical aspects, such as
 - ♦ Actions (0000)
 - ♦ Personal Data (0002)
 - ♦ Organizational Assignment (0001)
 - ♦ Addresses (0006)
 - ♦ Basic Pay (0008)
 - ♦ Residence Status (0094)

Validity Dates



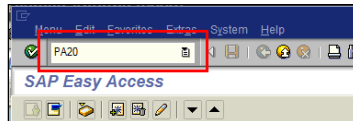
- Each infotype requires a begin and an end date to identify a validity period
 - ♦ Generally, records are identified with an end date of 12/31/9999 (referred to as the “high date”)

EE group	A	Staff	Pers.area	1000	Main Campus
EE subgroup	03	Exempt Monthly	Pers. subarea	0001	Reg FT
Start	05/01/2008	to	06/30/2008	Chng	05/07/2008 WGSUTH2
Personnel action					
Action Type	ZF Position Change				
Reason for Action	02 Promotion				

Employee Master Data – PA20




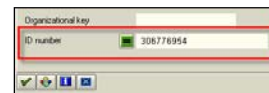
- The Personnel Administration transaction codes provide access to employee master data
 - ♦ **PA20** is used to display employee records and is the preferred T-code, since it allows multiple users access to the same employee's record at the same time
 - ♦ **PA30** is used to make changes to employee records; however, records are locked to prevent other users from accessing the data while it is being changed
 - ♦ **PA40** is used create actions for an employee and locks the employee's records from access by other users
- To use **PA20**:
 - ♦ In the **Command** field, type **PA20**, and then press **Enter**



Search Tips



- Search for an employee's data in one of three ways:
 - ♦ **By Name** =lastname.firstname
 - Type =LastName.FirstName in the **Person ID** field
 - Example: =Smith.George
 - ♦ **By using the Possible Entries icon** 
 - ♦ **By Social Security Number**
 - Click on the **Possible Entries** icon
 - Type the **SSN** in the **ID Number** field
- After finding the employee, press **Enter** to pull up the employee's master data



Accessing Employee Infotypes - PA20



The screenshot shows the 'Display HR Master Data' window. At the top, there are tabs for 'UK: Personal Data', 'UK: Payroll Data', 'UK: Benefits', and 'UK: Organizational Data'. The 'Employee Information' section is highlighted with a red box and a callout. Below it, the 'Infotype Selection List' is shown with a red box and a callout. The 'Period Selection' section is also highlighted with a red box and a callout. At the bottom, the 'Direct Selection' section is highlighted with a red box and a callout.

Accessing Employee Infotypes - PA20



- The Employee Information section provides basic employee master data
 - ♦ Person ID, Personnel Assignment Number, Name, FTE, Personnel Area/Subarea, and Employee Group/Subgroup

Person ID	10001751	Pers. Assgn	00000226 50103107 00000226
Name	John Quincy Adams	Empl. %	100.00
EE group	A Staff	Pers. area	1000 Main Campus
EE subgroup	06 Non-Exempt 37	Pers. subarea	0003 Reg PT >.74

Person ID & Personnel Assignment Number



Person ID	10001751	Pers.Assign	00000226 50103107 00000226...
Name	John Quincy Adams	Empl. %	100.00
EE group	A Staff	Pers.area	1000 Main Campus
EE subgroup	06 Non-Exempt 37...	Pers. subarea	0003 Reg PT > .74

- Person ID - Unique number for each employee which is assigned automatically during the New Hire Action

Person ID	10001751	Pers.Assign	00000226 50103107 00000226...
Name	John Quincy Adams	Empl. %	100.00
EE group	A Staff	Pers.area	1000 Main Campus
EE subgroup	06 Non-Exempt 37...	Pers. subarea	0003 Reg PT > .74

- Personnel Assignment (Personnel Number or PerNr) - Unique number depicting a relationship between the employee and a specific position/employer
 - ♦ Employees may have more than one assignment

Accessing Employee Infotypes - PA20

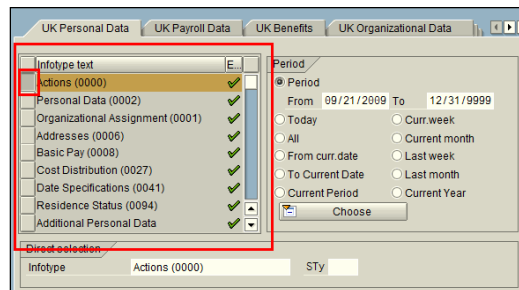


- Infotypes are categorized and listed under tabs
- To select a tab, you can click directly on it or choose it from the drop-down Tab List

Infotype Selection List



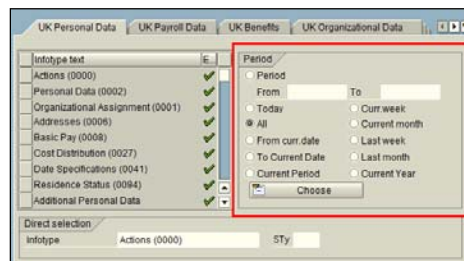
- The Infotype Selection List is used to access infotypes
- The list of infotypes is different on each tab
- To select an infotype, click on the **Selection** icon to the left of the infotype



Period Selection



- The Period Selection section can be used to expand or limit the number of records viewed
- For example:
 - ♦ If you want to view all the records within an infotype, select **All**
 - ♦ If you want to view just the current records, select **Today**



Direct Selection



- By using the Direct Selection Infotype field, you can move directly into the infotype without finding it in the Infotype Selection List
- Type the name (or part of the name) of the infotype

OR

Direct selection
 Infotype STy

- Type the four-digit number for the infotype into the field

Direct selection
 Infotype STy

Accessing Employee Infotypes - PA20



- You can choose to view the most current record for the infotype by clicking on the **Display** icon



- You can choose to view a summary of all the records for the infotype by clicking on the **Overview** icon



Display Actions (0000)

Person ID: 19901751 Pers.Assign: 00000226 50103107 00000226

Pers.No: 226

Name: John Quincy Adams Empl. %: 100.00

EE group: A Staff Pers. area: 1800 Main Campus

EE subgroup: 00 Non-Exempt 37 Pers. subarea: 0003 Reg PT = 74

Start: 11/27/2005 to: 12/31/9999 Chng: 11/20/2005 MEEV

Personal action

Action Type: ZV Change in Status

Reason for Action: 02 Reduce FTE

Status

Customer-specific:

Employment: 3 Active

Special payment:

Overview Actions (0000)

Person ID: 19901751 Pers.Assign: 00000226 50103107 00000226

Name: John Quincy Adams Empl. %: 100.00

EE group: A Staff Pers. area: 1800 Main Campus

EE subgroup: 00 Non-Exempt 37 Pers. subarea: 0003 Reg PT = 74

Choose: 01/01/1980 to 12/31/9999

Start Date	End Date	Act	Action type	ActR	Reason for act	C	E
11/27/2005	12/31/9999	ZV	Change in Status	02	Reduce FTE	3	
11/27/2005		ZW	FTE Change	01	FTE Change	3	
10/17/2005	11/26/2005	ZF	Position Change	02	Promotion	3	
02/12/2005	10/16/2005	ZA	Main Campus Create As.	01	Staff Hire	3	

IT 0000 – Actions



Action information for an employee, including:

- Validity dates
- Reason for action
- Employment status
- Position

If more than one record, use the **Next Record** or **Previous Record** icons to view



Display Actions (0000)

Person ID: 10001751 Pers. Assign: 00000226 50103107 00000226...
 Pers. No.: 226
 Name: John Quinncy Adams Empl. %: 100.00
 EE group: A Staff Pers. area: 1000 Main Campus
 EE subgroup: 06 Non-Exempt 37 Pers. subarea: 0003 Reg PT > 74
 Start: 11/27/2005 to 12/31/9999 Chng: 11/30/2005 MISSY

Personnel action
 Action Type: ZV Change in Status
 Reason for Action: 02 Reduce FTE

Status
 Customer-specific:
 Employment: 3 Active
 Special payment:

Organizational assignment
 Position: 50103107 Administrative Support As
 Personnel area: 1000 Main Campus
 Employee group: A Staff
 Employee subgroup: 06 Non-Exempt 37.5 hour

Additional actions

Start Date	Act.	Action type	ActR	Reason for acti
11/27/2005	ZV	Change in Status	02	Reduce FTE
11/27/2005	ZVW	FTE Change	01	FTE Change

IT 0002 – Personal Data



Personal information on an employee, including:

- Validity dates
- Name
- Social Security Number
- Date of birth
- Gender
- Marital status

Display Personal Data (0002)

Person ID: 10001745 Pers. Assign: 50103078 00000219 (Active)
 Name: Ida B. Lamb Empl. %: 100.00
 EE group: A Staff Pers. area: 1000 Main Campus
 EE subgroup: 06 Non-Exempt 37 Pers. subarea: 0001 Reg FT
 Start: 04/17/1975 To: 12/31/9999 Chng: 12/28/2005 BHMCG12

Name
 Title: Name format: 00
 Last name: Lamb
 First name: Ida
 Middle name: B
 Suffix: Nickname:
 Name: Ida B. Lamb

HR data
 SSN: 555-01-2457 Gender: Female Male
 Birth date: 04/17/1975
 Mar. Status: Widow
 HIC Number:

IT 0001 – Organizational Assignment



Organizational assignment information includes:

- Enterprise structure
 - ◆ Personnel Area
 - ◆ Personnel Subarea
 - ◆ Cost Center (main CC assigned to position)
- Personnel structure
 - ◆ Employee Group
 - ◆ Employee Subgroup
 - ◆ Payroll Area
- Organizational structure
 - ◆ Position
 - ◆ Job Key
 - ◆ Exempt status

Display Organizational Assignment (0001)

Person ID: 00001015 Pers. Assign: 00001015 51008840 00001015

Name: Mel H. Hudman Empl. #: 100-00

EE group: A Staff Pers. area: 1000 Main Campus

EE subgroup: 03 Exempt Monthly Pers. subarea: 0001 Reg FT

Start: 05/01/2008 to: 12/31/9999 Chng: 05/07/2008 MSSUTHZ

Enterprise structure

CocCode: 0000 University of Kentucky

Pers. area: 1000 Main Campus Subarea: 0001 Reg FT

Cost Ctr: 1012077420 DESKTOP TRAPEL Bus. Area: 0100 UK-wide component units

Fund: 001000100 FISC AFF&INFO TE

Grant: 00MR GM NOT RELEVANT

Func. Area: 0030 General Administrative Se

Personnel structure

EE group: A Staff Payr. area: R1 Monthly

EE subgroup: 03 Exempt Monthly Contract: 3B Non-Admin

Organizational plan

Percentage: 100.00

Position: 51008840 P0430M7

Job key: 41002520 Information Techno...

Exempt: E

Org. Unit: 30000076 JUS30

Org. key: 0001 Human Resources Tr.

Administrator

PersAdmin:

Time:

PayrAdmin:

IT 0006 – Addresses



Address information for an employee includes:

- Addresses:
 - ◆ Permanent Residence
 - ◆ Work Address
 - ◆ Secondary Work Address
- Telephone number
- County of residence
- Mail Code (Org Unit)
- Privacy Flag (used to designate home address as private)

Display Addresses (0006)

Person ID: 10001751 Pers. Assign: 00000226 50103107 00000226

Name: John Quincy Adams Empl. #: 100-00

EE group: A Staff Pers. area: 1000 Main Campus

EE subgroup: 00 Non-Exempt 37 Pers. subarea: 0003 Reg PT > 74

Start: 02/12/2003 to: 12/31/9999 Chng: 11/07/2005 R1507

Address

Address type: 1 Permanent residence

Address line 1: 1245 Centre Parkway

Address line 2:

City/county: Lexington

State/cp code: KY Kentucky 40517

Country Key: US United States

Telephone number: 958 279-9858

Communications

Type: Number: 0 Extension:

Additional fields

County: 034 Fayette

Mail code (org unit): 30000588 School Of Journalism & Te

Privacy Flag:

IT 0008 – Basic Pay



Payroll information for an employee, including:

- Payscale Type (Hourly/Salary)
- Payscale Area (Main Campus/Hospital)
- Payscale Group
- Work Hours/Period
- Annual Salary
- Wage Type
- Amount
- True Annual Salary
- Override Salary

IT 0041 – Date Specifications



Date specification information for an employee including:

- Original hire
- Current hire
- Regular service
- Vacation service

NOTE: A date of 12/31/9999 is a placeholder for the date type (i.e. Separation Date).

NOTE: If information is incorrect, contact HR Compensation so they can make the necessary changes.

IT 0094 – Residence Status



Residence status information for an employee including:

- Residence Status:
 - ♦ A HR–Non Resident Alien
 - ♦ C HR–Citizen
 - ♦ N HR–Resident Alien
- Work Permit
- Issuing Authority
- Expiration date
- I9 Signature Date

Display Residence Status (0094)

Person ID	10001751	Pers Assign	00000226 50103107 00000226
Name	John Quincy Adams	Empl %	100.00
EE group	A Staff	Pers Area	1000 Main Campus
EE subgroup	99 Non-Exempt 37 - Pers. subarea	0003	Reg PT > 74
Start	02/12/2005	To	12/31/9999
Changed on	02/05/2007 DELUGIA		

Personal identification

Residence status: C HR-Citizen

ID type

Issuing Authority

ID number

Issuing date

Expiry date

Employment verification

Work Permit

Issuing Authority

Work permit number

Issuing date

Expiry of WP

Additional fields

I9 Signature Date: 02/11/2005

IT 0007 – Planned Working Time



Work time information for an employee, including:

- Work Schedule Rule
- Working Week
- Employment Percent (FTE)
- Daily Working Hours
- Annual Working Hours

Display Planned Working Time (0007)

Work schedule

Person ID	10001751	Pers Assign	00000226 50103107 00000226
Name	John Quincy Adams	Empl %	100.00
EE group	A Staff	Pers Area	1000 Main Campus
EE subgroup	99 Non-Exempt 37 - Pers. subarea	0003	Reg PT > 74
Start	11/27/2005	To	12/31/9999
Chg	01/31/2006 DMRC12		

Work schedule rule

Work schedule rule: F12C 7.5 hrd 37.5 h/w M-F

Time Mgmt status: 11 - Time evaluation of actual times

Working week: 01 Working Week Sunday - Saturday

Part-time employee

Working time

Employment percent: 100.00

Daily working hours: 7.50

Weekly working hours: 37.50

Monthly working hrs: 162.50

Annual working hours: 1950.00

Weekly workdays: 5.00

Unit 2 – Check for Understanding



Please choose the best answer:

- The Personnel Administration (PA) component is used to...
 - ♦ Enter employee time information.
 - ♦ Process employee data and maintain employee information.
 - ♦ Process employee benefits.
- What transaction code is used to display employee master data?
 - ♦ PA20
 - ♦ PA30
 - ♦ PA40

Unit 3



Time Management (TM)

Unit 3 – Time Management



- Time Management Overview
- Time Management Key Benefits
- Time Management Infotypes
- Time Evaluation
- Time Entry Overview
- CATS Time Entry Process
- Displaying Absence Quotas
- Remuneration Statement
- Employee Cost Distribution Objects Report

Time Management Overview



- Time Management provides support for all processes involved in the planning, recording, and reporting of employee working times (attendances) and absences
- Time Management is integrated with Personnel Administration to obtain and validate information on working hours and leave quotas for absences
- There is also integration with Payroll – Hours entered, approved, and transferred are automatically released to the Payroll Department for processing



Time Management Key Benefits



- Default **Target Hours** for hourly employees (based on their specific work schedule) can be easily applied to their time entry screen to lessen the amount of data entry
- Overtime is not entered as a separate total but is calculated by the system from all hours worked within one week's time
- Vacation, TDL, and Holiday leave is accrued and tracked in IRIS rather than in separate departmental systems (excluding Housestaff employees)



IT 0007 – Planned Working Time



- Normal work schedule information for an employee – Used to determine an hourly employee's **Target Hours**
- The time management status determines how the employee will be paid; by actual times entered or by the planned times in the work schedule

Work schedule rule	
Work schedule rule	F11C 8 h/d 40 h/w M-F
Time Mgmt status	1 1 - Time evaluation of actual times
Working week	01 Working Week Sunday - Saturday
<input type="checkbox"/> Part-time employee	

Working time	
Employment percent	100.00
Daily working hours	8.00
Weekly working hours	40.00
Monthly working hrs	173.33
Annual working hours	2080.00
Weekly workdays	5.00

Absences/Attendances



- Can be recorded in partial day or full day amounts
- Some attendances/absences influence pay:
 - ♦ Hours in excess of 40 hours per week (overtime)
 - ♦ Shift differential
 - ♦ Unpaid leave
- Some absences influence quota balances:
 - ♦ Vacation
 - ♦ Temporary Disability Leave (TDL)
 - ♦ Holiday
 - ♦ Military Leave
- Other absences are for statistical purposes:
 - ♦ Jury Duty
 - ♦ Funeral Leave

IT 2001/2002 – Absences/Attendances



Absences (2001)				
Start Date	End Date	Abs...	Att./abs. type text	Hours
12/24/2007	12/24/2007	7170	VACATION	8.00
12/21/2007	12/21/2007	7170	VACATION	8.00
12/20/2007	12/20/2007	7170	VACATION	8.00
12/19/2007	12/19/2007	7170	VACATION	8.00
11/23/2007	11/23/2007	7150	HOLIDAY	8.00
11/22/2007	11/22/2007	7150	HOLIDAY	8.00
11/21/2007	11/21/2007	7170	VACATION	8.00
10/08/2007	10/08/2007	7405	FUNERAL LEAVE	4.00
10/05/2007	10/05/2007	7180	FUNERAL LEAVE	4.00

Attendances (2002)				
Start Date	End Date	Atte...	Att./abs. type text	Hours
12/07/2007	12/07/2007	1005	HOURS WORKED	8.00
12/06/2007	12/06/2007	1005	HOURS WORKED	8.00
12/05/2007	12/05/2007	1005	HOURS WORKED	8.00
12/04/2007	12/04/2007	1005	HOURS WORKED	8.00
12/03/2007	12/03/2007	1005	HOURS WORKED	8.00
11/30/2007	11/30/2007	1005	HOURS WORKED	8.00
11/29/2007	11/29/2007	1005	HOURS WORKED	8.00
11/28/2007	11/28/2007	1005	HOURS WORKED	8.00
11/27/2007	11/27/2007	1005	HOURS WORKED	8.00

Other Time Management Infotypes

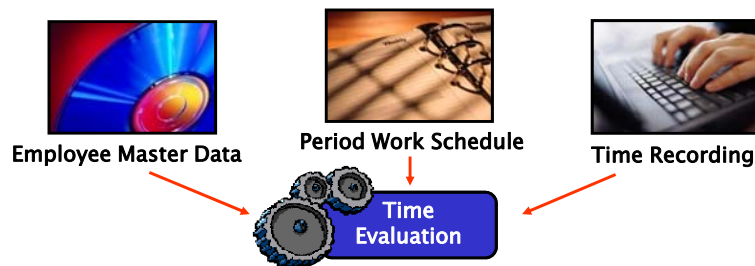


- Employee Remuneration Information (2010)
 - ♦ Used for manually processing calculated wage amounts, bonuses, premiums, and other irregular wage amounts
- Display Absence Quotas (2006)
 - ♦ Used to display vacation, temporary disability leave, holiday/bonus day, and military leave balances
- Quota Corrections (2013)
 - ♦ Used only by Employee Relations to make corrections and/or adjustments to quotas (i.e. converting TDL to vacation quota)
- Time Quota Compensation (0416)
 - ♦ Used to create TDL/vacation payouts for staff retirement and separation

Time Evaluation



- Time Evaluation is an automated daily process that:
 - ♦ Examines each employee's time data in light of institutional policies and federal and state requirements
 - ♦ Reports any errors
 - ♦ Calculates overtime
 - ♦ Maintains quota accruals and usage



Time Entry Overview



- Methods of capturing attendance/absence time data:
 - ♦ Timesheets
 - ♦ Time collection systems (manual data entry)
 - ♦ Time collection systems (using time clocks)
 - ♦ Absence Record form

- Time Entry Methods:
 - ♦ The Cross Application Time Sheet (CATS) interface in IRIS
 - ♦ A few areas at the University use non-IRIS, external time management systems/applications for recording time, and their data is uploaded into the IRIS HR/Payroll area for payroll processing once each pay period

CATS Time Entry Process



- Time data is manually entered
 - ♦ Attendance/absence data for biweekly/hourly employees
 - ♦ Absence data only for monthly/salaried employees (attendance data is automatically processed by IRIS)

Data Entry Period		11/25/2007 - 12/08/2007									
Data Entry Area											
LT	Pers.No.	Name	COAF/AA...	Total	SU 11/25	MO 11/26	TU 11/27	WE 11/28	TH 11/29	FR 11/30	SA
	245	Jonsey T. Smith		88	0	8	8	8	8	8	8
	245	Jonsey T. Smith UK00	1005	62			8	8	8	6	
	245	Jonsey T. Smith UK00	7170	8		8					
	245	Jonsey T. Smith UK00	7180	18					2	8	

- Then the time must be reviewed and approved on-line
- Finally, the time must be transferred from CATS into the appropriate infotypes (2001/2002) in the IRIS HR/Payroll module for payroll processing

Displaying Absence Quotas



- Appropriate department users and business officers will have access to display absence quotas for employees within their organizational units
- Transactions available: PT_QTA10 and PT50
- The reports will provide:
 - ♦ Type of quota – Vacation, TDL, Holiday, and Military Leave
 - ♦ Entitlement hours (cumulative balance), Requested hours (time taken) and Remaining hours (current balance)
- Quota balances and the associated expiration dates will be printed on pay stubs
- Employees may also view their quotas via the myUK Employee Self Serve website
- All balances are in **Hours** only

Displaying Absence Quotas



- PT_QTA10:

Pers.No.	Organizational unit	Name (sortable)	Quota	Σ	Entitlement	Σ	Used	Σ	Total remain.
			Vacation		157.40000		157.40000		0.00000
			Vacation		160.16000		153.38000		0.00000
			Vacation		67.76000		0.00000		42.54000
			TDL		301.46000		103.50000		197.96000
			Vacation(Legacy Transfer)		8.22000		8.22000		0.00000
			Holiday		8.00000		8.00000		0.00000
			Holiday		64.00000		32.00000		32.00000
					767.00000		462.50000		272.50000

Left blank intentionally

- PT50:

Quota Typ	Quota text	Unit	Entitl.	Rem.	Requested
01	Vacation	Hours	385.32000	42.54000	342.78000
02	TDL	Hours	301.46000	197.96000	103.50000
04	Vacation(Legacy T...	Hours	8.22000	0.00000	8.22000
06	Holiday	Hours	8.00000	0.00000	8.00000
07	Holiday	Hours	64.00000	32.00000	32.00000

Remuneration Statement



- The Remuneration Statement (report) displays **Total Earnings, Taxes, Post Tax Deductions, Pre Tax Deductions and Employer Contributions**
- The report is available after each of the three payroll runs and is identical in content to the pay stub, minus the absence quota information
- Departments often generate this report to verify that the time entry and payroll processes were successful for all of their employees
- Transaction Code = PC00_M10_CEDT



Remuneration Statement Example



Employee Name Street Address City, State, ZIP	Person ID 00000000	SSN	Pay Date 11/16/2007	Period Begin Date 23/07	End Date 10/28/2007	Check No.	Net Pay 1,064.55
		Filing Status	Exemptions FED	Add With	Exemptions ST	Add With	
CODE EARNINGS	RATE	HOURS	CURRENT	YTD	CODE PRE-TAX DEDUCTIONS	CURRENT	YTD
3000 Hours Worked	18.56	84.50	1,568.32	33,443.49	4325 F Parking RW She	14.00	299.00
3030 Overtime 0.5	9.28	4.50	41.76	1,423.70	5000 UK HMO Lexington	13.00	281.00
3200 Holiday Non-Exempt				1,444.48	5100 Eyemed Vision	4.45	95.90
3220 Vacation Non-Exempt				1,428.22	5130 MetLife Dental En		129.00
**** Total Earning			1,610.08	37,739.89	5135 Delta Dental Enha	14.47	173.64
					5510 TIAA/CREF 403b EE	37.12	836.75
CODE TAXES					5520 Fidelity 403b EE	37.12	836.75
FED TX Withholding Tax			181.21	4,445.18	**** Total Pre Tax Deductio	120.16	2,852.04
FED TX EE Social Securit			96.98	2,289.63			
FED TX EE Medicare Tax			22.68	535.48	CODE POST-TAX DEDUCTIONS	CURRENT	YTD
KY TX Withholding Tax			74.00	1,759.20	5210 Optional Life Ins EE	5.22	105.42
KY51 TX EE School Tax			8.05	189.54	5220 AD&D Coverage EE	1.00	24.43
KY09 TX EE Occupation Tax			36.23	852.95	**** Total Post Tax Deducts	6.22	129.62
**** Total Tax			419.15	10,071.98			
					CODE BENEFITS	CURRENT	YTD
					6000 UK HMO Lexington E	182.50	3,965.00
					6200 Basic Life Ins Emp	1.06	35.42
					6510 TIAA/CREF 403b ER	74.24	1,673.50
					6520 Fidelity 403b ER	74.24	1,673.50
					6702 Staff Misc Fringe	59.57	1,330.60
					7404 TX ER Social Secur	96.98	2,289.63
					7406 TX ER Medicare Tax	22.68	535.48
					**** Total Benefits	511.87	11,503.13

Employees Cost Distribution Objects Report

- Transaction **ZCOSOBJ** provides a report on the cost object distribution for employees that will be processed in payroll, either from Infotype 1018 or 0027

Employees Cost Distribution Objects						
Person ID	Personnel Number	First Name	Last Name	Organisation Unit	Position	
18092956	00092449	Evan	Struss	04600/Robotics Center	A0002K3/Engineer Assoc Progra	
Exp. cost distrib. (Wage/Salary 12/01/2005 to 12/31/9999)						
			Percentage(%)	WBS Element	Fund	Order
	1012078980		100.00		0011620100	
Person ID	Personnel Number	First Name	Last Name	Organisation Unit	Position	
10004759	00003232	Ebony	Navington	04600/Robotics Center	A0004R2/Industry Extension Sp	
Exp. cost distrib. (Wage/Salary 12/01/2005 to 12/31/9999)						
			Percentage(%)	WBS Element	Fund	Order
	1013102540		30.00		0011620100	
	1013200460		70.00		0011620100	
Person ID	Personnel Number	First Name	Last Name	Organisation Unit	Position	
18006629	00005102	Warren	Clark	04600/Robotics Center	P0151M5/Industry Extension Sp	
Exp. cost distrib. (Wage/Salary 12/01/2005 to 12/31/9999)						
			Percentage(%)	WBS Element	Fund	Order
	1013183540		40.00		0011620100	
	1013200460		50.00		0011620100	
	1043801250		10.00		0041812500	
Person ID	Personnel Number	First Name	Last Name	Organisation Unit	Position	
10007230	00005812	Charles	Hudson	04600/Robotics Center	P0092M5/Industry Extension Sp	
Exp. cost distrib. (Wage/Salary 12/01/2005 to 12/31/9999)						
			Percentage(%)	WBS Element	Fund	Order
	1013102540		30.00		0011620100	
	1013183550		16.00		0011620100	
	1013200460		5.00		0011620100	
	1043801250		49.00		0041812500	

Unit 3 – Check for Understanding

Please choose the best answer:

- **True or False:** Attendance and absence time is entered for both hourly and salaried employees.
- How many steps are involved in the CATS time entry process?
 - ◆ 3
 - ◆ 2
 - ◆ 5
 - ◆ 1



Payroll

Unit 4 – Payroll

- Payroll Accounting
- Payroll Process Overview
- Remuneration Elements
- Statutory and Voluntary Deductions
- Deferred Pay

Payroll Accounting



Payroll accounting includes:

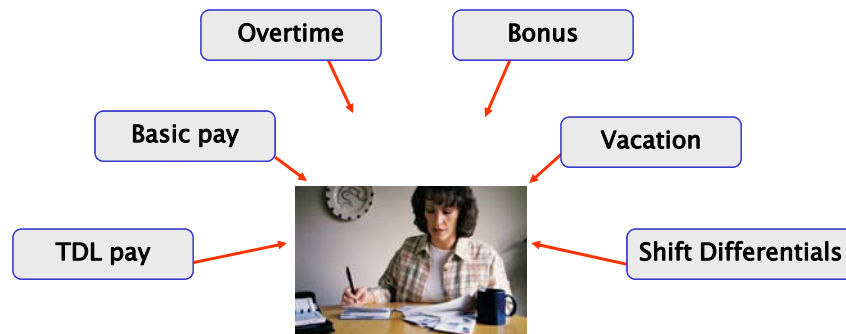
- Gross-to-net calculation of pay
- Generation of payroll results and remuneration statements
- Bank transfers
- Check payments
- Transfer of payroll results to Accounting
- Integrates with other HR modules
- Produces employee pay statements
- Payroll expense distribution



Remuneration Elements



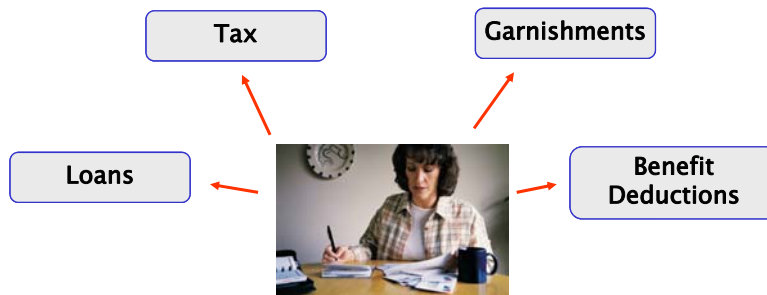
- An employee's remuneration elements are made up of wage types applied during a payroll period.



Statutory and Voluntary Deductions



- Voluntary and statutory (required) deductions are used to reduce gross remuneration resulting in the net pay amount



Deferred Pay



- The Deferred Pay Solution provides a method of accurately tracking earnings and payments for employees who work for less than a full year, but who are paid over twelve (12) months (i.e., nine and ten month faculty).





Reporting

- IRIS Reports
- Business Warehouse (BW) Reports

IRIS Reports



Transaction Code	Report Name	Information
CATS_DA	Display Working Time	Display working times for a single employee or a group of employees.
PPOSE	Organization and Staffing Display	Display an object in the organizational structure and its lesser related objects. Display the master data records of any of these objects.
ZHR_VACREP	Position Vacancy Report	Display current vacant positions by name and vacancy dates for specific organizational units.
S_AHR_61018869	History of Vacancies	Display the history of vacancies (names and dates) and names of current position holders for every organizational unit.
S_AHR_61016498	Job Index	Displays the name, object codes, position, holder, and staffing percentage of all active jobs.
S_AHR_61016497	Existing Jobs	Display the names, codes, and start/end for any active jobs.
ZHRFLEX	Flexible Employee Data	Report on employees selected by a wide range of criteria and with a range of layouts.
ZHR_ADDRESSES	Address Query	Used to create a home address list for employees within an organizational unit.
ZHR_FTE	FTE Report	Report on FTE and headcount.

IRIS Reports



Transaction Code	Report Name	Information
ZHR_HIREREPORT	Hire Action Report	Report of new hires, rehires, and reinstates in org unit for a specified time period. Report also indicates if a new employee's payroll record is locked
ZHR_POSATTR	Position Attribute Report	Report on the positions in an area, including the Enterprise Structure, Grade level, EEO information, cost distribution, and the funding category code.
ZHR_POSCHANGE	Position Change Action Report	Report lists employees who have changed positions in an area during a specified period of time. The report gives information on employee's new assignment, including new pay rate.
ZHR_SEPARATE	Separation Report	Report provides a listing of employees who have been separated from an org unit during a specified period of time.
ZHR_VACREP	Position Vacancy Report	Report provides a wide variety of information on a position, including the enterprise structure, funding, funding category code, EEO category and subcategory, grade level, current holder, and FTE information of that holder. If the position is vacant, that is shown as well.
ZHR_VAC_ACCR	Vacation Accrual Liability	Report may be used by Business Officers to see the financial liability for vacation hours that are available to employees in their departments

IRIS Reports



Transaction Code	Report Name	When to Run	Comments
PC00_M10_CED T	Remuneration Statements	Run after preliminary payroll run up to final payroll for that period.	Simulates paycheck for pay-period.
ZCCWBS	Cost Center Report	Run after payroll posting to accounting.	EE salary and ER benefits with cost allocation.
ZCOSOBJ	Employee Cost Distribution Objects	Run any time.	Shows cost allocations (IT 0027 or IT 1018) for employee.
ZHR_1018	Position Cost Center Distribution	Run any time.	Shows cost distribution on positions.
ZHR_CHECKPAY	Check Pay Report	Run after preliminary run and thereafter for specific payroll period and single payroll area.	Quick reference to identify employees who have no pay amount for a specific payroll period.

IRIS Reports



Transaction Code	Report Name	When to Run	Comments
ZHR_PAYRESULTS	Payroll Results by Org Unit	Run after the preliminary payroll run up to final payroll for that period.	Shows payments of unit's employees and costs associated with each employee per payroll.
ZHR_TIMEFEEDRPT	Time Feed Audit Report	Run for a specific payroll period.	Report for areas with time feed systems. Provides a listing of attendance and absence codes for specified time period. Areas that use CATS_DA will not use this report.
ZVERXFER	Verify Transfer of Time	Run after transfer.	Used to verify hours that have transferred successfully to HR for payment. May also be used to find hours that were unsuccessful during the transfer process.

Business Warehouse (BW) Reports



Report Name	Information
HR Labor Distributions	Eight reports available – Labor Distribution Faculty Cert by Org Unit; Labor Distribution Staff Cert by Org Unit for non FES Faculty; Labor Distribution Staff Cert by Org Unit for Staff; Labor Distribution Analysis by Department ; Labor Distribution Analysis by Funds Center ; Labor Distribution Analysis by Grant ; Labor Distribution Analysis by Organizational Unit ; Labor Distribution Analysis by WBS Element.
Employee Data (Not Labor) by Org Unit	Provides basic employee master data for an Organizational Unit.



Terminology & Help

Key Terminology



Terminology	Definition
Organizational Unit	Represent any type of organizational entity found in the University and are assigned to cost objects (Units, Colleges, Departments, etc.)
Job	Provides a general classification of tasks that are routinely performed together and is used to describe several positions. Jobs describe a position by its EEO category, job group, and census code (Staff Support Associate, Regular Faculty, Student/Non-Work Study, etc.)
Position	Described by a job and related to an organizational unit. May be held by one person or many people

Key Terminology



Terminology	Definition
Company Code	The highest organizational unit of financial accounting (UK00)
Personnel Structure	A description of the employee's position in the University
Person or Holder	Employees - persons are assigned directly to positions which are described by jobs and assigned to an organizational unit

Key Terminology



Terminology	Definition
Infotype	Used in HR to access specific screen information, such as Personal Data, Basic Pay, Addresses
Action	A series of infotypes that sequentially display for data entry to complete an HR process
Master Data	The accumulation of an employee's personnel information in IRIS (Name, Address, Basic Pay, etc.)
Person ID	During the New Hire action, IRIS assigns a unique personnel number to each employee rather than using the social security number
Personnel Assignment Number (PerNr)	A relationship between an employee/retiree and an employer, each personnel assignment is uniquely identified in IRIS by the personnel number

Key Terminology



Terminology	Definition
Personnel Area	Defines a specific area within the University (units, colleges, departments, etc.)
Personnel Subarea	Assigned to a Personnel Area and allows for further division of the personnel area (Ex. Regular FT, Regular PT, Temp PT < . 20)
Employee Group	Represents various types of employees in an organization (Staff, Faculty, Student, etc.)
Employee Subgroup	Assigned to an Employee Group and allows for further division of the Employee Group (Exempt Monthly, Non-Exempt 37.5, Non-Exempt 40, etc.)
Payroll Area	The Payroll Area provides the payroll driver with: Employee number and Dates of the payroll period (Monthly, Biweekly, etc.)

Key Terminology



Terminology	Definition
Absence quotas	The number of vacation, temporary disability, holiday, and military service hours an employee is allowed to use. These are created on request or by accruing a number of hours per pay period, or holiday worked.
Attendance Types	Describes how an employee was paid for work. For example, 1005 means hours worked.
Absence Types	Describes why an employee was absent from work. Common absences include disability, vacation, jury duty, and excused time off.
Wage Type	A four-character identifier for amounts, numbers, or rates used to calculate employee remuneration. Wage types represent earnings and deductions.
Pay Period	Identifies the period of time being processed for payroll. The periods in a payroll year are numbered in ascending order, beginning with 01. For example, period 01 for a monthly payroll employee covers time for January 1 – 31.

Key Terminology



Terminology	Definition
Time Entry System	The system used to capture, edit, and approve hours worked and absences for non-exempt employees for the purpose of payment, and absences for exempt employees.
Time Evaluation	Evaluates employee's time data against the University pay policies and government agency requirements. Generates information for Payroll and leave accruals.
Period Work Schedule	An employee's planned working time. Describes the days per week, hours per day, and shift an employee is regularly planned to work over a period of time.

Help Websites



- myHelp website:
 - ♦ <http://myHelp.uky.edu/rwd/HTML/index.html>
 - ♦ Contains Quick Reference Cards (QRCs), updated course manuals, Simulations, Frequently Asked Questions, and other job aids
- IRIS website
 - ♦ <http://www.uky.edu/IRIS/>
 - ♦ Contains Information Directory, Forms, and other references

HR Courses

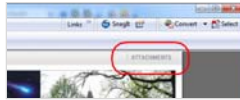


- Classroom Lab Courses
 - ♦ HR_OM_320 Position Creation
 - ♦ HR_PA_300 Personnel Administration
 - ♦ HR_PA_310 PA Actions
 - ♦ HR_TM_300 Time Management
- HR WBT Courses
 - ♦ HR_200 Human Resources Overview
 - ♦ HR_PA_340 Faculty Actions

HR_200 Exercises



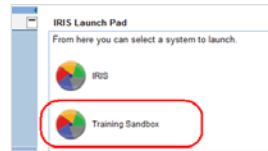
- After the course, you can practice viewing student data in the Training Sandbox



- ♦ Click on **Attachments**
- ♦ Click on **HR_200 Practice Guide**



- ♦ Print the **HR_200 Practice Guide** pdf
- ♦ Go to the Training Sandbox and follow the directions in the practice guide



Course Summary



You are now able to:

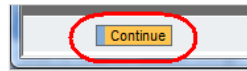
- Understand the various components of the Human Resources and Payroll module of the IRIS system
- Understand the basic organizational structure of human resources in the system
- Access basic employee master data
- Understand basic employee time management



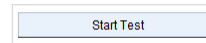
Check for Understanding Instructions



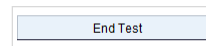
- To begin the Check for Understanding, click **Continue** (bottom left corner of the screen)



- Click **Start Test** to continue
 - Although it says "Test", this course does not have an assessment



- When you have entered your answers, click **End Test** (located at the top of your screen)



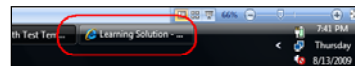
- After the results are displayed, click **Log off** (lower right corner)



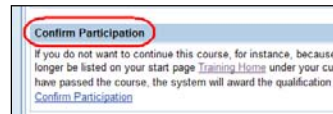
Course Completion Instructions



- When the WBT window closes, it should back to your original browser window
 - If not, click on the browser window in your taskbar and wait for the screen to refresh



- Scroll down the page until you see the **Confirm Participation** section
 - Be patient, the screen will need to refresh and it may take a few minutes



- To complete the course, click **Confirm Participation**

