



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



- Understand the various components of the Human Resources and Payroll module of the IRIS system
- Understand how the HR process integrates with other IRIS functions
- Understand the basic organizational structure of human resources in the system
- Access basic employee master data
- Understand basic employee time management
- Gain insight to the UK payroll process and functionality

Course Instructions



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



- Click **QRC Overview Navigation** pdf

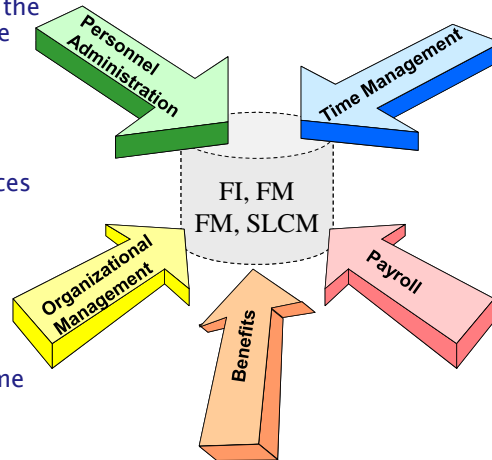


- Print the pdf
- Use the pdf to navigate the course and take the Check for Understanding exercises at the end of each unit

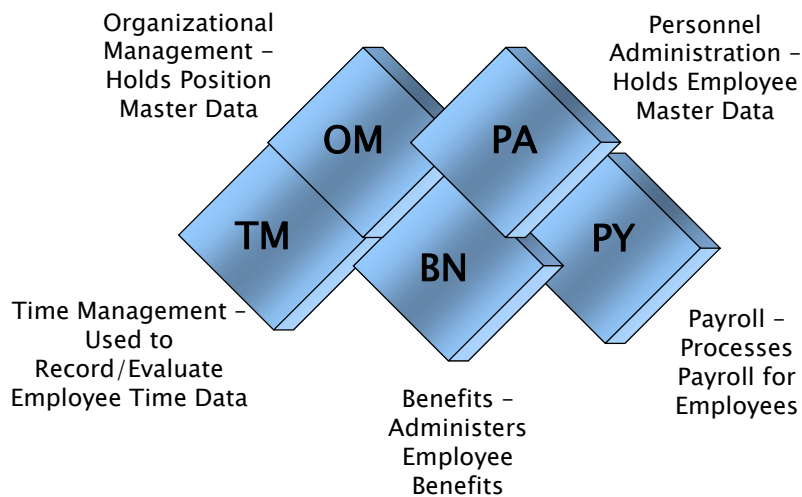
Integration Across IRIS



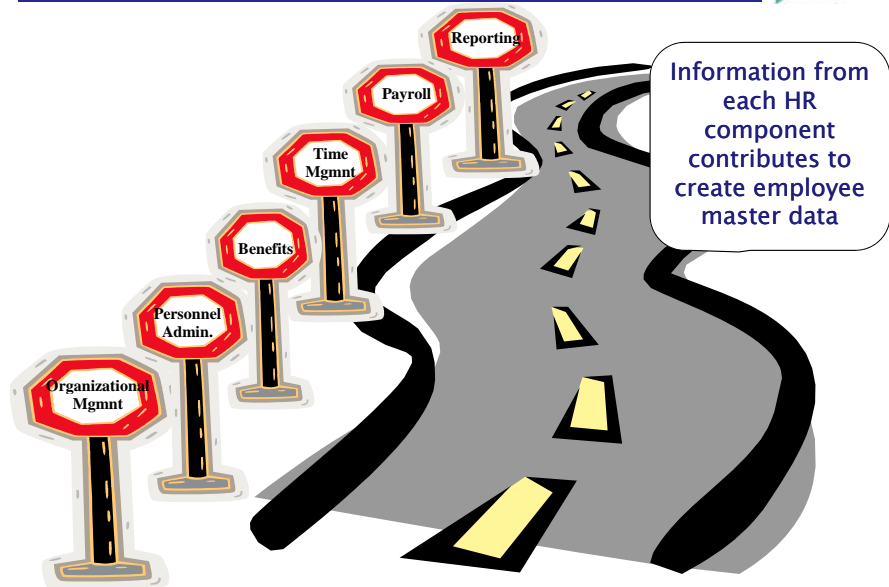
- HR/Payroll data integrates with other IRIS modules.
 - ♦ If the employee is also a student the Person ID and the Student Number will be the same.
 - ♦ Changes to an employee's master record may affect salary/benefit encumbrances in FM.
 - ♦ Payroll is charged to cost objects in FI and GM.
 - ♦ PPD/Housing 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 an HR user and have an approved training plan;
 - ♦ To sign the Statement of Responsibility (SOR).
 - Instructions are 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 the time entry transaction codes.

Introduction Summary



- HR/Payroll data integrates with other IRIS modules.
- Access to employee master data and to certain transaction codes will be based on your HR security role in the IRIS system.
- Click on the **Continue** button to move to Unit 1
 - ♦ **Note:** The button is located in the lower left corner of your screen.



Unit 1



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

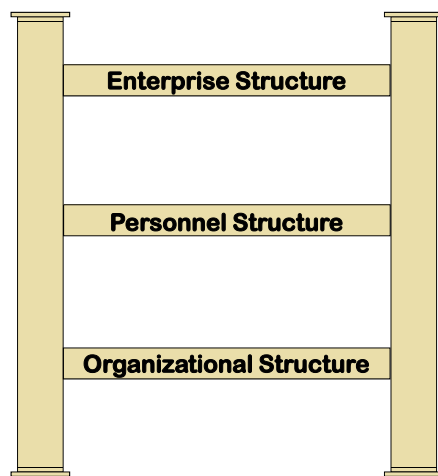


- OM objects create and maintain the structure of the organization in the system.
- They allow classification according to features and types of information and arrangement into categories.
- They link objects and establish relationships and inheritance of attributes.
- OM objects include:
 - ♦ Organizational 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



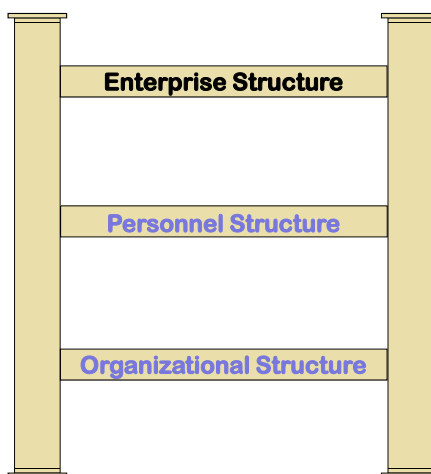
- There are three structural concepts within IRIS that are used to build the HR view of an employee.



Enterprise Structure



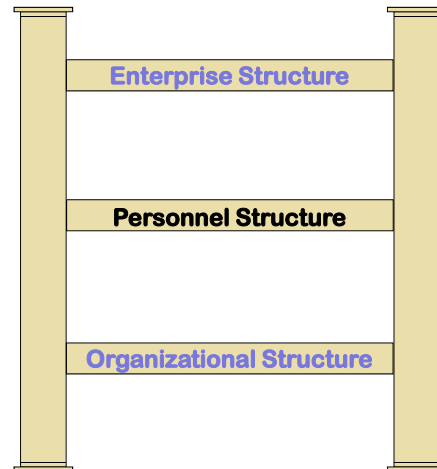
- The Enterprise Structure provides reporting attributes.
- It provides default values for data entry, selection criteria for reporting, and authorization/security verification data.
- Data includes:
 - ♦ Company Code
 - ♦ Personnel Area
 - ♦ Personnel Subarea



Personnel Structure



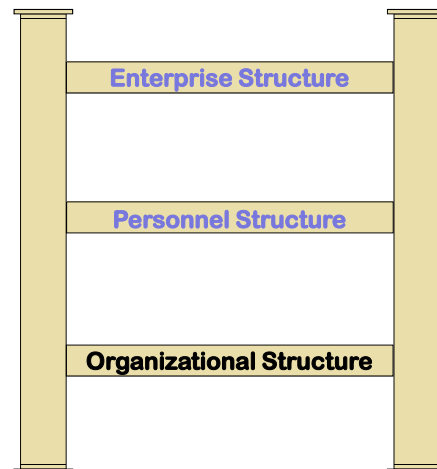
- The Personnel Structure defines the employee type.
- It provides default values for data entry, selection criteria for reporting and authorization/security verification data.
- Data includes:
 - ♦ Employee Group
 - ♦ Employee Subgroup
 - ♦ Payroll Area



Organizational Structure



- The Organizational Structure defines the hierarchical relationship between OM objects.
- It provides a comprehensive and dynamic model of UK's structure that serves as the foundation of OM.
- Data includes:
 - ♦ Organizational Units
 - ♦ Jobs
 - ♦ Positions



Job vs. Position



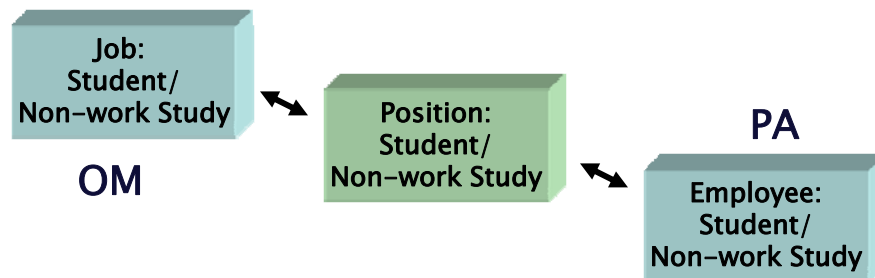
- Jobs are created and maintained by Compensation only.
 - ♦ They provide general classification of tasks routinely performed together.
 - ♦ They establish the EEO category, job group, and pay grade.
- Positions are created and maintained by Compensation (regular staff positions) and Business Officers (faculty, temporary, and student positions).
 - ♦ They inherit the attributes from the job.
 - ♦ They assign relationships with a specific department and (unless vacant) a specific employee or employees.



Integration Point – Position



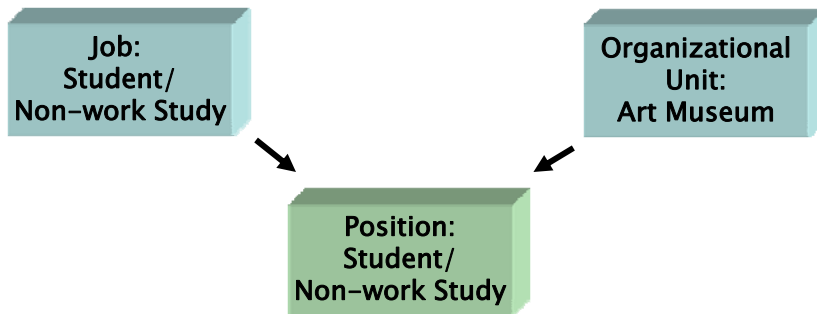
- The integration point between the job (Organizational Management – OM) and the employee (Personnel Administration – PA) is the position.



Relationships



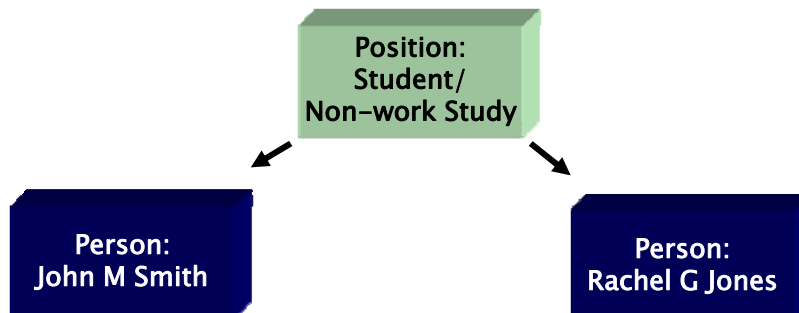
- Positions are assigned relationships to:
 - ♦ A Job which describes the EEO category, job group, and pay grade;
- AND**
- ♦ An Organizational Unit which defines the reporting structure as a one-dimensional hierarchy.



Relationships



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



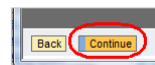


Unit 1

Check for Understanding

Unit 1 Summary

- Organizational Management objects include organizational units, jobs, and positions.
- The three structural concepts used to build the HR view of an employee are the Enterprise, the Personnel, and the Organizational Structures.
- Click on the **Continue** button to move to Unit 2





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Personnel Administration



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



Infotypes (IT)



- The personnel master data, time management and related data fields are grouped together on Infotypes (IT) according to logical aspects.
- Examples include:
 - ♦ Actions (0000)
 - ♦ Personal Data (0002)
 - ♦ Organizational Assignment (0001)
 - ♦ Addresses (0006)
 - ♦ Basic Pay (0008)
 - ♦ Residence Status (0094)
 - ♦ Absences (2001)
 - ♦ Attendances (2002)

Validity Dates



- Each infotype requires a begin and an end date to identify a validity period.
- Current records are identified with an end date of 12/31/9999 (referred to as the “high date”).
- Previous records will show the date they were started and the date they were delimited (ended).

Person ID	10001751	Pers.Assgn	00000226 50102915 00000226...
Pers No.	226		
Name	John Quincy Adams	Empl. %	100.00
EE group	A Staff	Pers.area	1000 Main Campus
EE subgroup	03 Exempt Monthly	Pers. subarea	0001 Reg FT
Start	08/01/2009	to	12/31/9999
Chng	07/28/2010	MISSY	
Personnel action			
Action Type	ZF Position Change		
Reason for Action	02 Promotion		

Employee Master Data



- 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, such as address changes or cost distribution changes.
 - However, records are locked to prevent other users from accessing the data while it is being changed unless they use PA20.
 - ♦ **PA40** is used create actions for an employee, such as hiring a new employee, changing an employee's position, or changing base salary.
 - Records are locked from access by other users unless they use PA20.

Search Tips



- To pull up an employee's records, enter the employee's Person ID in the **Person ID** field

Person ID

- Or** you can search for an employee's data in one of two ways:

- ### By Name

Person ID

- Type =LastName.FirstName in the **Person ID** field
- Example: =Adams.John

- ### By using the Possible Entries icon

Person ID

- By Name
- By Social Security Number 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 for employee John Quincy Adams (Person ID 10001751). The window is divided into several sections:

- Employee Information:** Displays personal data, organizational assignment, and other details.
- Tab Selection:** A set of tabs at the bottom of the main data area, including 'UK Personal Data', 'UK Payroll Data', 'UK Benefits', and 'UK Organizational Data'.
- Infotype Selection List:** A list of infotypes on the left side, such as 'Actions (0000)', 'Personal Data (0002)', 'Organizational Assignment (0001)', etc.
- Period Selection:** A section on the right side for selecting a time period, with options like 'Today', 'From curr. date', 'To Current Date', etc.
- Direct Selection:** A section at the bottom for direct selection of infotypes, with a field for 'Infotype' and a 'STy' button.

Accessing Employee Infotypes – PA20



- The Employee Information section provides basic employee master data.
- It displays the following data:
 - Person ID
 - Personnel Assignment Number
 - Name
 - FTE
 - Personnel Area/Subarea
 - Employee Group/Subgroup

Person ID	10001751	Pers.Assgn	00000226 50102915 00000226...
Name	John Quincy Adams	Empl. %	100.00
EE group	A Staff	Pers.area	1000 Main Campus
EE subgroup	03 Exempt Monthly	Pers. subarea	0001 Reg FT

Person ID & Personnel Assignment Number



Person ID	10001751	Pers.Assgn	00000226 50102915 00000226...
Name	John Quincy Adams	Empl. %	100.00
EE group	A Staff	Pers.area	1000 Main Campus
EE subgroup	03 Exempt Monthly	Pers. subarea	0001 Reg FT

- The **Person ID** is a unique number for each employee which is assigned automatically during the New Hire action.

Person ID	10001751	Pers.Assgn	00000226 50102915 00000226...
Name	John Quincy Adams	Empl. %	100.00
EE group	A Staff	Pers.area	1000 Main Campus
EE subgroup	03 Exempt Monthly	Pers. subarea	0001 Reg FT

- The Personnel Assignment number is a combination of the Personnel Number (PerNr), which is a unique number depicting a relationship between the employee, and the position number.
 - 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 are infotypes.
- The list of infotypes is different on each tab
- To display an infotype, click on the **Selection** icon to the left of the infotype and then click on the **Display** icon.

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, you would select **All**.
 - ♦ If you want to view just the current records, you would 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.
- To use the Direct Selection Infotype field:
 - ♦ Type the name (or part of the name) of the infotype

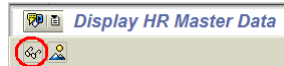
OR

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

Accessing Employee Infotypes - PA20



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



Display Actions (0000)

Person ID: 10001751 Pers. Assign: 00000226 50102915 00000226

Pers. No: 226

Name: John Quincy Adams Empl. %: 100.00

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

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

Start: 08/01/2009 to: 12/31/9999 Chng: 07/28/2010 HISSY

Personnel action

Action Type: ZF Position Change

Reason for Action: 02 Promotion

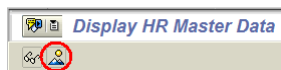
Status

Customer-specific:

Employment: 3 Active

Special payment:

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



Overview Actions (0000)

Person ID: 10001751 Pers. Assign: 00000226 50102915 00000226

Name: John Quincy Adams Empl. %: 100.00

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

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

Choose: 01/01/1900 to: 12/31/9999

Start Date	End Date	Act	Action Type	ActR	Reason for action	C
08/01/2009	12/31/9999	ZF	Position Change	02	Promotion	3
11/02/2005	07/31/2009	ZV	Change in Status	02	Reduce FTE	3
11/02/2005		ZW	FTE Change	01	FTE Change	3
10/17/2005	11/02/2005	ZF	Position Change	02	Promotion	3
02/12/2005	10/16/2005	ZA	Main Campus Create As	01	Staff Hire	3

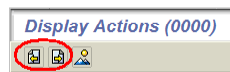
IT 0000 - Actions



Action information for an employee, includes:

- 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 50102915 00000226

Pers. No: 226

Name: John Quincy Adams Empl. %: 100.00

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

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

Start: 08/01/2009 to: 12/31/9999 Chng: 07/28/2010 HISSY

Personnel action

Action Type: ZF Position Change

Reason for Action: 02 Promotion

Status

Customer-specific:

Employment: 3 Active

Special payment:

Organizational assignment

Position: 50102915 Instructional Technology

Personnel area: 1000 Main Campus

Employee group: A Staff

Employee subgroup: 03 Exempt Monthly

Additional actions

Start Date	Act	Action Type	ActR	Reason for action
08/01/2009	ZF	Position Change	02	Promotion

IT 0002 – Personal Data



Personal information on an employee, includes:

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

Display Personal Data (0002)

Person ID: 10001751 Pers. Assign: 00000226 50102915 00000226...
 Name: John Quincy Adams Empl. %: 100.00
 EE group: A Staff Pers. area: 1000 Main Campus
 EE subgroup: 03 Exempt Monthly Pers. subarea: 0001 Reg FT
 Start: 05/04/1980 To: 12/31/9999 Chng: 12/28/2005 BWC012

Name
 Title: Name Format: 99
 Last name: Adams
 First name: John
 Middle name: Quincy
 Suffix: Nickname:
 Name: John Quincy Adams

HR data
 SSN: 555011214 Gender: ☐ Female ☒ Male
 Birth date: 05/04/1980
 Mar. Status: 1 MARR
 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: 10001751 Pers. Assign: 00000226 50102915 00000226...
 Name: John Quincy Adams Empl. %: 100.00
 EE group: A Staff Pers. area: 1000 Main Campus
 EE subgroup: 03 Exempt Monthly Pers. subarea: 0001 Reg FT
 Start: 05/04/2009 to: 12/31/9999 Chng: 07/26/2010 WTS0V

Enterprise structure
 CoCode: UK00 University of Kentucky
 Pers. area: 1000 Main Campus Subarea: 0001 Reg FT
 Cost Ctr: 1012004760 ED INST MEDIA CE... Bus. Area: 0101 UK w/o component units
 Fund: 0011020100 PROVOST UK GEN...
 Grant: 00NR 00NR
 Func. Area: 0430 Audio/Visual Services

Personnel structure
 EE group: A Staff Payr. area: 01 Monthly
 EE subgroup: 03 Exempt Monthly Contract: 30 Non-Admin

Organizational plan
 Percentage: 100.00
 Position: 50102915 P0322M7
 Job key: 40500237 P0322M7
 Exempt: Y Instructional Technol...
 Org. Unit: 30000562 9C310
 Org. key: 0001 Education Instr Media...

Administrator
 Pers. Admin:
 Time:
 PayAdmin:

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)

IT 0008 – Basic Pay



Payroll information for an employee, includes:

- 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 includes:

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

Date type	Date	Date type	Date
01 Original Hire Date	02/12/2005	02 Current Hire Date	02/12/2005
03 Reg Service Date	02/12/2005	05 Vacation Svc Date	02/12/2005
07 Separation Date	12/31/9999		

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 includes:

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

Personal Identification

Residence status: C HR-Citizen

Employment verification

Work Permit: [blank]

Additional fields

I9 Signature Date: 02/11/2005

IT 0007 – Planned Working Time



Work time information for an employee, includes:

- 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 50102015 00000226

Name: John Quincy Adams Empl. %: 100.00

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

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

Start: 06/01/2009 To: 12/31/9999 Chg: 07/28/2010 MISSY

Work schedule rule

Work schedule rule: F11C 8 hio 40 h/w M-F

Time Mgmt status: 9 9 - Time evaluation of planned times

Working week: 01 Working Week Sunday - Saturday

☐ 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



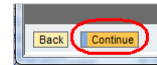
Unit 2

Check for Understanding

Unit 2 Summary



- The personnel master data, time management and related data fields are grouped together on Infotypes (IT) according to logical aspects.
- Each infotype requires a begin and an end date to identify a validity period.
- **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.
- Click on the **Continue** button to move to Unit 3



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.
- It 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 is 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



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

IT 2001/2002 – Absences/Attendances



- Examples of Absence and Attendance Infotype records:

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	FULL SAL	

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

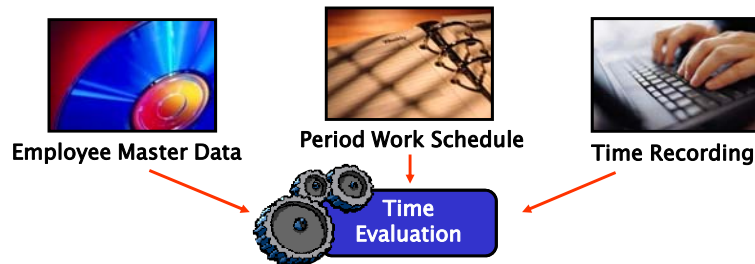


- **Employee Remuneration Information (2010)** is used for manually processing calculated wage amounts, bonuses, premiums, and other irregular wage amounts.
- **Display Absence Quotas (2006)** is used to display vacation, temporary disability leave, holiday/bonus day, and military leave balances.
- **Quota Corrections (2013)** is used only by Employee Relations to make corrections and/or adjustments to quotas (i.e. converting TDL to vacation quota).
- **Time Quota Compensation (0416)** is 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 include the following:
 - ♦ Timesheets
 - ♦ Time collection systems (manual data entry)
 - ♦ Time collection systems (using time clocks)
 - ♦ Absence Record form
- The main time entry method is 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 entered manually.
 - ♦ Attendance/absence data is entered for biweekly/hourly employees.
 - ♦ Absence data only is entered 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	COAR	AA...	Total	SU 11/25	MO 11/26	TU 11/27	WE 11/28	TH 11/29	FR 11/30	S			
	245		Jonsey T. Smith			80	0	8	8	8	8	8	8			
	245		Jonsey T. Smith UK00	1005		62			8	8	6					
	245		Jonsey T. Smith UK00	7170		8		8								
	245		Jonsey T. Smith UK00	7180		10					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.
- The PT_QTA10 and PT50 reports will provide the:
 - ♦ 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



- Absence Quota Examples:

- ♦ 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

- ♦ PT50:

Display Absence Quotas (20)						Accrual Information						Attendance Quotas (20)					
otaTyp	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 the employee's 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.
- You should use transaction Code PC00_M10_CEDT to generate this report.



Remuneration Statement Example



Employee Name Street Address City, State, ZIP	Person ID 00000000	SSN	Pay Date 11/16/2007	Period Begin Date 23/07 19/28/2007	End Date 11/10/2007	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 E Parking BW She	14.00	299.00
3030 Overtime 0.5	9.28	4.50	41.76	1,423.70	5000 UK HMO Lexington	13.00	291.00
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
CODE TAXES					5510 TIAA/CREF 403b EE	37.12	836.75
FED TX Withholding Tax			181.21	4,445.18	5520 Fidelity 403b EE	37.12	836.75
FED TX EE Social Securit			96.98	2,289.63	**** Total Pre Tax Deductio	120.16	2,852.04
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	24.00
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	1.66	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
					/404 TX ER Social Secur	96.98	2,289.63
					/406 TX ER Medicare Tax	22.68	535.48
					**** Total Benefits	511.87	11,503.13

Employees Cost Distribution Objects Report

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

Person ID	Personnel Number	First Name	Last Name	Organisation Unit	Position
10002965	00002448	Evan	Struss	00600/Robotics Center	A000303/Engineer Assoc Progra
Exp. cost distri. (Wage/Salary 12/01/2005 to 12/31/9999)					
	1012078988			100.00	0011020100
10004759	00003232	Ebony	Nevington	00600/Robotics Center	A000482/Industry Extension Sp
Exp. cost distri. (Wage/Salary 12/01/2005 to 12/31/9999)					
	1013103540			30.00	0011620100
	1013200460			70.00	0011620100
10006629	00005102	Warren	Clark	00600/Robotics Center	P0015195/Industry Extension Sp
Exp. cost distri. (Wage/Salary 12/01/2005 to 12/31/9999)					
	1013103540			40.00	0011620100
	1013200460			50.00	0011620100
	1043801250			10.00	0041812500
10007230	00005812	Charles	Hudson	00600/Robotics Center	P000295/Industry Extension Sp
Exp. cost distri. (Wage/Salary 12/01/2005 to 12/31/9999)					
	1013103540			30.00	0011620100
	1013103550			15.00	0011620100
	1013200460			5.00	0011620100
	1043801250			40.00	0041812500



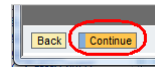
Unit 3

Check for Understanding

Unit 3 Summary



- Time Management provides support for all processes involved in the planning, recording, and reporting of employee working times (attendances) and absences.
- Vacation, TDL, and Holiday leave is accrued and tracked in IRIS rather than in separate departmental systems (excluding Housestaff employees).
- Click on the **Continue** button to move to Unit 3



Unit 4



Payroll

Unit 4 – Payroll



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

Payroll Accounting



Payroll accounting includes:

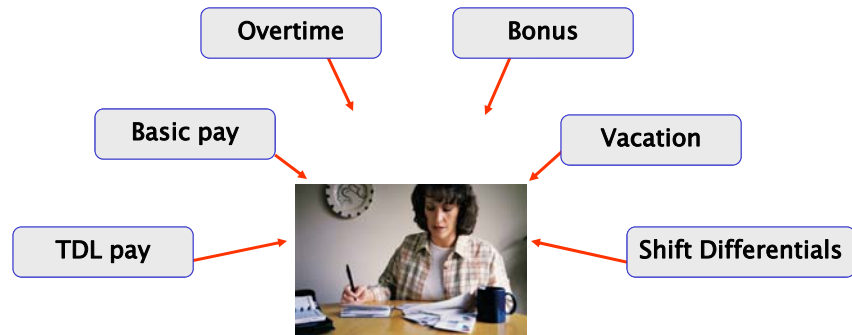
- Gross-to-net calculation of pay
- Generation of payroll results and remuneration statements
- Bank transfers
- Check payments
- Transfer of payroll results to Accounting
- Integrates with other HR modules
- Produces employee pay statements
- Payroll expense distribution



Remuneration Elements



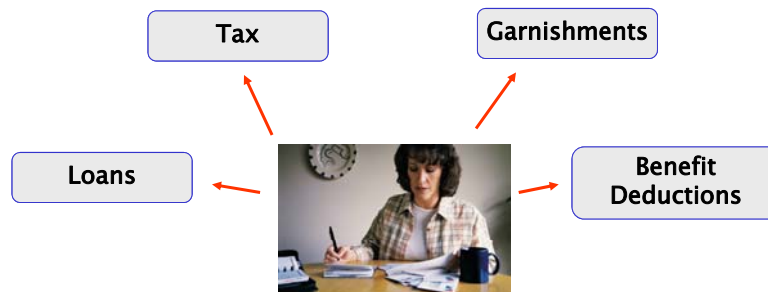
- An employee's remuneration elements are made up of wage types applied during a payroll period.



Statutory and Voluntary Deductions



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



Deferred Pay



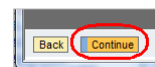
- The Deferred Pay Solution provides a method of accurately tracking earnings and payments for employees who work for less than a full year, but who are paid over twelve (12) months (i.e., nine and ten month faculty).



Unit 4 Summary



- An employee's remuneration elements are made up of wage types applied during a payroll period.
- Voluntary and statutory (required) deductions are used to reduce gross remuneration resulting in the net pay amount.
- Click on the **Continue** button to move to Unit 5





Reporting

- IRIS Reports
- Business Warehouse (BW) Reports

IRIS Reports– Organizational Management



Report Name	Transaction Code	Description
Cost Center Report	ZCCWBS	Displays the employee salary and employer benefits with cost allocation; Run after payroll posting to accounting
Existing Jobs	S_AHR_61016497	Displays the names, codes, and start/end for any active jobs
History of Vacancies	S_AHR_61018869	Displays the history of vacancies (names and dates) and names of current position holders for every organizational unit
Job Index	S_AHR_61016498	Displays the name, object codes, position, holder, and staffing percentage of all active jobs
Organization and Staffing Display	PPOSE	Displays an object in the organizational structure and its lesser related objects. Display the master data records of any of these objects.
Position Attribute Report	ZHR_POSATTR	Displays the positions in an area, including the Enterprise Structure, Grade level, EEO information, cost distribution, and the funding category code

IRIS Reports– Organizational Management



Report Name	Transaction Code	Description
Position Cost Center Distribution	ZHR_1018	Displays cost distribution on positions
Position Creation Tracking Report	ZHR_POSITION_TRACK	Displays basic information about positions
Position Vacancy Report	ZHR_VACREP	Displays current vacant positions by name and vacancy dates for specific organizational units
Salary Recommendation	ZHR_SALREC	Displays salary recommendations including an equity check for employees in the same job

IRIS Reports– Personnel Administration



Report Name	Transaction Code	Description
Address Query	ZHR_ADDRESSES	Used to create a home address list for employees within an organizational unit
Employee Cost Distribution Objects	ZCOSOBJ	Displays cost allocations (IT 0027 or IT 1018) for employee
Flexible Employee Data	ZHRFLEX	Displays employees selected by a wide range of criteria and with a range of layouts
FTE Report	ZHR_FTE	Displays FTE and headcount
Hire Action Report	ZHR_HIREREPORT	Displays 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
One Time Payment Report	ZHR_0015	Displays one time payments; can run using a wide range of selection criteria

IRIS Reports– Personnel Administration



Report Name	Transaction Code	Description
Position Change Action Report	ZHR_POSCHANGE	Displays employees who have changed positions in an area during a specified period of time; Provides information on employee's new assignment, including new pay rate
Recurring Payment Report	ZHR_0014	Displays recurring payments; Can be run using a wide range of selection criteria
Retirement Action Report	ZHR_RETIRE	Displays retirement actions
Separation Report	ZHR_SEPARATE	Displays a listing of employees who have been separated from an org unit during a specified period of time
User ID and Email Report	ZHR_USER_ID	Displays a list of user system IDs and email addresses

IRIS Reports– Time Management



Report Name	Transaction Code	Description
Check Pay Report	ZHR_CHECKPAY	Quick reference to identify employees who have no pay amount for a specific payroll period; Run after preliminary run and thereafter for specific payroll period and single payroll area
Payroll Results by Org Unit	ZHR_PAYRESULTS	Displays payments of unit's employees and costs associated with each employee per payroll; Run after the preliminary payroll run up to final payroll for that period
Remuneration Statements	PC00_M10_CEDT	Simulates paycheck for pay-period; Run after preliminary payroll run up to final payroll for that period
STEPS Time Fee Audit	ZHR_STEPS	Used to validate STEPS hours that have been loaded
Display Working Time	CATS_DA	Displays working times for a single employee or a group of employees

IRIS Reports– Time Management



Report Name	Transaction Code	Description
Time Feed Audit Report	ZHR_TIMEFEEDRPT	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; Run for a specific payroll period
Vacation Accrual Liability	ZHR_VAC_ACCR	Used by Business Officers to see the financial liability for vacation hours that are available to employees in their departments
Verify Transfer of Time	ZVERXFER	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; Run after transfer

Business Warehouse (BW) Reports

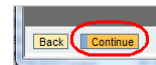


Report Name	Information
HR Labor Distributions	Eleven reports available using the following display preferences: <ul style="list-style-type: none">• By Pay Period• Staff Cert by Org Unit for non FES faculty• Staff Cert by Org Unit for Staff• By Department• By Funds Center• By Grant• By Organizational Unit• By WBS Element• YTD Detail Analysis by Department• PTD Detail Analysis by Department
Employee Data (Not Labor) by Org Unit	Displays basic employee master data for an Organizational Unit.

Unit 5 Summary



- Click on the **Continue** button to move to the course summary





Terminology & Help

Key Terminology

- Use the following steps to display and print the Human Resources (HR) Key Terminology quick reference card:

- ♦ Click on **Attachments**
 - ♦ Located in the upper right corner of your screen



- ♦ Click on **QRC HR Key Terms**
- ♦ Print the **QRC HR Key Terms** pdf



Help Websites

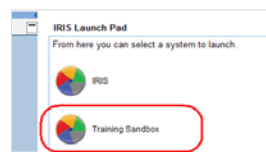


- myHelp website:
 - ♦ <http://myHelp.uky.edu/rwd/HTML/index.html>
 - ♦ Contains Quick Reference Cards (QRCs), updated course manuals, Simulations, Frequently Asked Questions, and other job aids
- IRIS website
 - ♦ <http://www.uky.edu/IRIS/>
 - ♦ Contains Information Directory, Forms, and other references

HR_200 Exercises



- After the course, you can practice viewing employee 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



Course Completion Instructions



- Click **QRC Course Completion** and print the QRC
 - ♦ **Note:** The QRC will open in another window.
- Click **OK** to close the **Attachments** window
- Follow the steps in the QRC to complete the course

