Transcripts

Title: MacViP Online Training	
Objective: HR/Payroll Screens for Managers	Playing Time: 15 mins

Demographic

As a part of your role as a Manager you've been given access to some Human Resources and Payroll Screens.

Let's start by opening Human Resources/Demographic and open up Individual Information. Click on Go.

As we move through these screens, we'll just click on "Go" in order to populate each screen with data.

You can use to view an employee's Individual demographic information, such as Student ID (if the employee is also a McMaster student), Age and Marital Status

We can open up the Individual Address screen by clicking on the blue bar

This screen allows for a **Primary**, **Secondary** and **Other** address. The mandatory address information is entered in the **Primary** address block.

If we click on the Old Employee Number blue bar, we'll be able to see if the employee has a PPS (old HR/Payroll system) ID. That means that they were not active when MacViP went live, but that they have worked for the university in the past and were paid off of the old system. This number can be used as a reference to their old employee information.

Next, were going to look at the Employee Directory. We click on Go and the screen is populated.

You can view an Employee's McMaster contact information on this screen. The employee's job, position and work address information is displayed on this screen.

Employment

Now we'll open up Employment and then open up the Employee Screen.

This screen displays the employee's **Original Hire Date** and **Last Hire Date**. The employee's **Emergency Contact** information is also displayed on this screen.

To view an Employee's employment status we can open up the **Employee – Employment Status** screen. In MacViP there are four Status Reason Types – they are

Active, Terminated, Paid Leave, Unpaid Leave. There are many Status Reasons. We can view them by clicking on the table look up icon beside the Status Reason description field.

Position Management

The next screen that we are going to review is the Employee Position screen. However, before we do that it's important that you understand the concept of Position Management, its use at the University and also why it's an integral part of the MacViP application.

So exactly what is Position Management?

Position Management allows organizations to define and administer positions independent of the incumbent.

Benefits

Position Management provides the ability to do Organization charting (such as Department) for reporting and analysis purposes, as the system is set up by hierarchy of positions – e.g position of the Office of the President at the top, Vice Presidents below the President and so on

Position Management also allows for massive General Ledger (the account where the position is charged to) changes and structure changes. A group of positions can easily have their General Ledger (GL) account changed, or be moved to report to a different position.

Position Management also allows for the definition of security- which positions a user is allowed to view. In MacViP, the employees that you are able to view are based on the position that they hold and if you have been given access to that position.

Concept

The easiest way to understand Position Management is to think of 3 Managers. Each manager works in a different department, has their salary charged to a different GL account, reports to a different person, and may even have a different schedule.

Job

They all share the same Job. That job is Manager. Information such as Job Title, compensation group and Salary Range/Scale would be the same for these managers.

Position

However each one would be attached to a different position. The position would contain

the job of Manager, but it would also have other information such as Position number and title, Work location is the position Permanent and Full/Part Time, the Work Schedule, Reporting Relationship, and the GL account it is charged to.

Definition

In summary a Job is what you do. A Position is about where you do it, who you do it for and when you do it.

Identifying Positions

Every employee at McMaster is attached to a position in MacViP. Some positions may have more than one employee and some employees may have more than one position.

One: One

For example there may be a one-to-one relationship between an employee and a position. They would be the only employee sitting on that position.

One: Many (1)

However there can also be many employees attached to one position. This could happen if there were a number of employees who all share the same job in one department. For example in the bookstore there are many cashiers. Rather than having to have many positions set up for those employees, one position has been established and all of the employees, who are cashiers, are attached to the one position.

One: Many (2)

Every department has been provided with 1 Temporary/Casual position. Again if a department has 15 temporary casual employees they can all be attached to the same position.

Many: One

Lastly, one employee may hold more than one position. For example a faculty member may have a faculty position and also an administrative position or an employee may work in 2 part-time positions.

Owned vs. Worked

It is important to understand that every employee will have at least one **Owned** position (even if they share that position with other employees)

However they can also do work in another position and that time can be entered under

Worked Position via the **Time Sheet Detail** screen, which we will talk about when we look at the Time Capture process in MacViP.

Assignment Types

The way that the system allows an employee to own more than one position is by the Assignment Type. Employees can have a Primary Assignment – only one, but they can also hold multiple Secondary Assignments. Human Resources set up and deactivate the employee's Primary and Secondary Assignments.

Employment (Cont'd)

Now let's look at the Employee Position Screen. We'll click on Go to populate the screen. We can see the Employee Position information for TMG Woman. We see that she holds Position # 03835 – Social Sciences-Kinesiology and that her job is 0807- Facilities Manager.

We also can see that she was attached to this position on Nov.13, 2006, and that it is her Primary Assignment.

If we click on the blue bar where it says Hierarchy, we can view the hierarchy of the position that the employee is attached to within the university.

Now let's open up the Employee Position History Screen. This screen shows us the Position History for any employee that we have access to view. In this case, you can see that TMG Woman has held 3 positions. Two have expiry dates. The most current appears at the top, has no expiry date and is the position she currently "owns".

The next screen that we're going to look at is the Position/ Job Detail/Salary.

Click on Go.

You'll notice that this screen contains information that we've already viewed on different screens – e.g. Position, Hierarchy and Employment Status. However as a Manager, this screen provides you with access to an employee's Salary information.

Let's open up the salary screen. You can see that TMG Woman is paid an annual salary of $59,000.00. If we scroll to employee ID 6004485, we can see how an hourly employee's information displays.

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From this screen we can also open up the Employee Position Schedule History which shows the Schedule Employee is or has been attached to. Now open, Organizational and Employee Position GL screens which shows the GL account the employee's salary is charged to.

Now let's skip down to the Employee Credited Service screen.

Click on Go.

This screen displays the employee's Continuous Service Date, Recognized Continuous Service Date, which could be different if the employee has previous McMaster employment) and Research Leave Date (different than the start date if the employee (Faculty only) has negotiated a porting of service from another university to go towards their accrued service for their research leave.

HR Payroll

You may have noticed that there are 2 Payroll Menus. We're going to look at the Payroll, which falls under Human Resources first.

The first screen that we are going to look at under the Payroll menu is the Premiums and Allowances screen. It is where any premiums or allowances, which have been set up for an employee, such as a stipend, scholarship, car allowance, or honorariums are displayed.

Now let's open up Entitlement Bank – Employee. After we press Go, we see the Vacation Bank information for Andrew Smith. He has a balance of 49 hours of vacation time.

By clicking on the blue box beside the Entitlement bank, we can pull up the table that shows us all of the Entitlement banks. Any time that you see a blue box beside a field, you are able to double click on it and you will be able to view all of the possible values that could be entered into that particular field.

Time taken from these banks will be updated when a transaction code is entered during time entry. For example when an employee takes vacation time, the individual entering time for that person will enter a vacation transaction code and the number of hours per day that were taken. When payroll is processed, the employee's entitlement bank (Vacation, Overtime, Sick) will be decreased by the number of hours entered.

As a manager you also have access to some other Entitlement related screens such as the Sick Bank Information, Illness and Injury, Illness and Injury Payment screens. You can refer to your Training Manual for more details regarding these screens.

Functions

Under functions, lets open up the Individual's Complete List. This is also known as the Global Query. It is used to determine if an employee exists in the MacViP system (either as an active or terminated employee)

Control Tables

In your role as a Manager, you have been given access to a number of Control tables. You can refer to the Training Manual for details regarding the content of these tables. For purposes of this online training we'll just look at two of the Control Tables - the Position Account and Position Schedule tables.

We open up Control Tables, Organization and Position Account. You can view the **GL account** to which the **Position** is charged via this screen.

Now we can open up the **Position Schedule** screen. It shows us the schedule that a **Position** is attached to.

If a **Position** is going to be charged to a different **GL Account** for a period of time then that change is made at the employee level. Let's go up to the Employment Position Account Override.

Click on Go.

Under Employment. In this case the position, which TMG Woman owns is being charged to a different GL account than the account that is on the Position Account table.

Similarly, if a schedule needs to be set up for a position for a period of time, and that position is different than what is set up on the Position Schedule table, then the override can be made on the Employee's Schedule Override Information. Click on Go.

When we look at this screen for TMG woman, we see that she has a schedule override, which means that the schedule for her position is different than what is on the table

Payroll

The last module that we are going to look at is the Payroll module. Within Payroll, we'll open up Employment. We've already looked at some of these screens under Human Resources. However there are 2 screens that we have not seen.

The first is the Bank Summary: This screen provides details regarding each of the

employee's Entitlement banks, including Last Year Balance, Current Year Received, Current Year Balance, Booked and Balanced.

As a Manager, you are also able to view the Payroll Register and Payroll Register Detail screens. These screens will provide you with per pay Earnings and Deduction information for your employees. Refer to your manual for screen shots of these screens, as this information is not available in our Training database.

Exercise Instruction

Now it's time for you to go and log onto the Training database to complete Exercise 1.

You have the option either print, write down your answers and then fill them in online or do the exercise and fill-in-online as you are going through the system.

The system will let you know if the answers are correct, and if there are errors it will provide you with hints on how to access the correct information. Good Luck with the exercise.