

# Systems Overview

December 8, 2011



a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA

# Agenda

- Systems Roll-out
- Key Points
- Overview of Systems
- Process Flow
- Scenarios

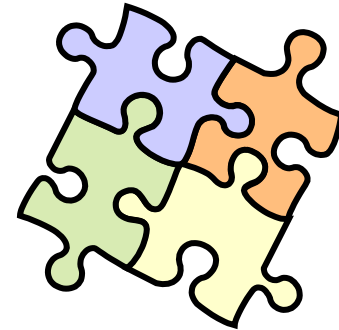


a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA

# Systems Roll-out

- Position Management and Hyperion – Fall 2010
- ePAF (eForms) (Staff and Students) – July 2011
- Anticipated Roll-out Winter/Spring 2012
  - ePAF – Faculty
  - eRecruit – Staff and Faculty
  - Uniform Workflow – applied to eRecruit, Position Management and ePAF



# Key Points

- Organizational structure is defined by position rather than employee
- Most budgeting for employees is done by position
- Systems are dependent on one another
- Many data items within systems are synchronized automatically



a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA

# Position Management (PM)

- A registry of every Faculty and Staff position (student and unpaid positions optional)
- Positions can be filled or vacant
- Positions can be pooled
- Defines key attributes of a position such as position number, department, job classification, job description, title, FTE, reporting relationship and budget
- Budget information includes effective dates and speedcharts
- Budgets based on position or hire data
- Positions are the starting point for hiring and budgeting



# eRecruit

- Electronic recruitment of posted faculty and staff positions
- Positions must be classified in Position Management first
- Posting info must match position info (e.g. dept, job code, dates)
- Identifies posting information such as start dates, salary, location, FTE, monthly/hourly
- Applicants create a profile, upload a resume, apply electronically, check application status, get alerts of interesting jobs
- Recruiters see prioritized application list, distribute applications electronically to interview team members, create interview schedules, produce offer letters
- Recruiters assign employee ID, upload documents and prepare successful applicant for hire



a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA

## eForms (ePAF-electronic personnel action form)

- Electronic hiring of non-posted faculty, staff and student appointments
- Ongoing adjustments to all types of appointments (salary, FTE and speedchart changes, leaves, terminations, etc.)
- Positions must be classified in Position Management first (student and unpaid appointments do not require positions)
- eForm data must match PM data (e.g. dept, job code, dates)
- Does not include timesheets



# HRMS - Human Resources Management System

- Primary repository of information for all UBC employees for purposes of salary administration, benefits enrolment and payroll
- Used by faculty and departmental administrators to view employment history, produce reports and extract data
- Used by employees (via self-service) to update contact information, view pay stubs, obtain T4s, apply for tuition waivers and apply for jobs



a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA

# FMS – Financial Management System

- Primary repository used by UBC to track financial transactions
- FMS nQuery is the primary reporting tool for financial administrators and managers
- Different chartfield combinations are used to enter and retrieve information in FMS
- Actual payroll costs are uploaded from HRMS into the FMS system at month end close
- Users can drill down to see details of specific transactions



# Hyperion

- University wide budgeting system
- Includes current year Plan and Forecast for each department (loaded each October/November for next fiscal year)
- Capability of holding Forecasts for 4 future years (facilitates future planning/budget process)
- Current year forecast updated monthly from PM, HRMS and FMS throughout the fiscal year
- Users update their current year forecast in real time
- Linked to Position Management:
  - Position inventory
  - Budgets for vacant positions
  - Budgets for positions set to 'Posn Data' (i.e. Pooled or Hourly Positions)



# Hyperion

- Linked to HRMS:
  - Employee information
  - Budgets for positions set to 'Hire Data'
  - Salary 'actuals'
- Linked to Financial Management System:
  - General Ledger actuals loaded monthly into Hyperion
  - Funding transfers in Hyperion are loaded into FMS
- Reporting:
  - Users will use system to generate variance analysis reports to compare budget to actuals



# Uniform Workflow

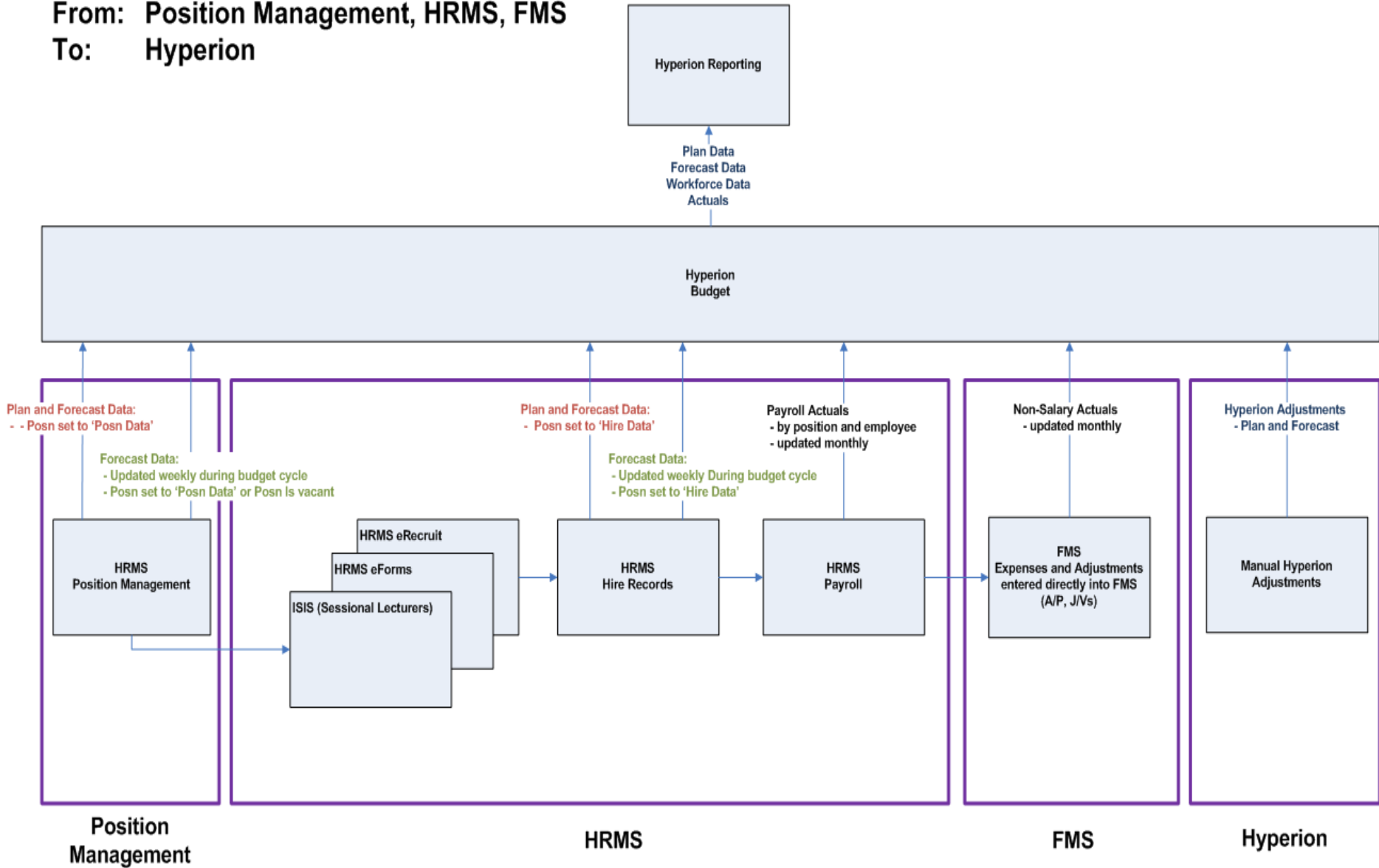
- A table within PeopleSoft that houses the “approver rules” to direct systems to electronically route transactions to one or more workflow approvers
- Workflow is an electronic equivalent of a hand written signature
- Workflow provides a standard solution for:
  - Maintenance of the routing rules
  - Delegation of approvals due to vacation
  - Tracking
- To be applied to eRecruit, Position Management, eForms, new Travel & Expenses, and eProcurement systems



# Flow of Data:

From: Position Management, HRMS, FMS

To: Hyperion



a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA

# Scenario #1 – New Staff Position

An administrative unit receives budget approval for a new ongoing, full-time position. This position does not currently exist within the department. The position is M&P and the salary is estimated at \$70,000 per year.

*Referring to the process flow document, where would you start and what steps would be required? Walk us through the process flow document.*



a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA

# Scenario #1 – Answer

- Brand new position- create job description in PM
- Job description reviewed and classified by HR in PM
- Update PM based on classified position salary scale, adjust budget accordingly and submit for dept. approval
  - Note: Set budget to “hire data”; review Workforce detail in Hyperion
- Post position, review candidates, route resumes to interview panel, select candidate, generate offer letter, prepare successful candidate for hire “prepare for hire” in eRecruit
- HR approval required if:
  - it is a rehire of a BCGEU employee (step and rate will be checked)
  - it is a M&P hire and the salary is above midpoint
- Payroll receives “appointment” information from eRecruit, processes job data
- Department goes to Hyperion Workforce and reviews monthly variance analysis
- As part of regular monthly financial review, department reviews actual payroll expenses in FMS



a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA

## Scenario #2 – Hire a Student

A Department Head needs to hire a Graduate Teaching Assistant for the period January 1, 2012 to April 30, 2012. He believes that a position may exist already in position management within the department but is not sure. He has an excellent student he wishes to hire, Daniel Green. As administrator for the department, he has asked you to complete the appointment form to hire Daniel.

*Referring to the process flow document, where would you start and what steps would be required? Walk us through the process flow document.*



a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA

## Scenario #2 – Answer

- Non-posted, student position
- Check if position exists in PM; student positions are optional
- If position # exists, check how Budget data was set in PM (should be set to Position Data in PM)
- Initiator completes eForm to Hire; enter in Position number if one exists, otherwise the position field is blank
- eForm approved electronically; job data processed in HRMS
- Department goes to Hyperion Workforce and reviews monthly variance analysis
- If position exists, department should be reviewing overall student budget for the year for reasonableness in Hyperion
- If no position exists, then department must manually adjust forecast at the account level in Hyperion to include student salary expense
- As part of regular monthly financial review, department reviews actual payroll expenses



## Scenario #3 – Change of Funding

You have been notified by your Department Head of a change within the department that you need to address:

- The current salary for a Clerk is being paid from speedchart HJKL, but should be 25% from HJKL and 75% from ABCD, effective June 1, 2011 and on-going

*Referring to the process flow document, where would you start and what steps would be required? Walk us through the process flow document.*



a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA

# Scenario #3 – Answer

- Go to PM to update “position information” panel and “budget” panel for speedchart change:
  - “Event” date on position information panel must be on or before the date of the budget funding change
  - “Begin Date” on Budget panel must be on or before the date of the budget funding change; make change to speedchart(s) under “Account and Budget Details”
- Initiator completes eForm to “change existing job”
- PM data must agree to eForm data in order to process
- Electronically routes eForm to department approver, then to Payroll
- Payroll receives “EDC” information electronically and processes job data change
- Department goes to Hyperion Workforce and reviews monthly variance analysis
- As part of regular monthly financial review, department reviews actual payroll expenses



a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA

## Scenario #4 – Vacancy

A position created 2 years prior is currently vacant. The budget for this position is set to 'Hire Data'. You need to ensure that the correct budget for this position appears in Hyperion, and make any corrections necessary.

*Referring to the process flow document, where would you start and what steps would be required? Walk us through the process flow document.*



a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA

## Scenario #4 – Answer

- In PM, leave the Funding Info as “Hire Data”
  - Note: Hyperion first will look for person to populate budget, if vacant position, it defaults to the budget panel “funding details”
- If budget tab has changed, update any applicable changes



# Scenario #5 – Leave Replacement

A person in a BCGEU staff position has gone on leave for 3 months, and you need to hire a temporary leave replacement (term).

Describe 2 sub-scenarios:

- a) The leave replacement will be hired at the same classification.
- b) The leave replacement will be hired at a lower classification.

*Referring to the process flow document, where would you start and what steps would be required? Walk us through the process flow document.*



## Scenario #5 (a)– Answer

- Initiator creates an “Change Employment Status” eForm to place person on Leave
- Initiator creates a Hire eForm to hire an employee into the current position
- Electronically routes eForms to department approver, then to Payroll
- Department goes to Hyperion Workforce and reviews monthly variance analysis
- As part of regular monthly financial review, department reviews actual payroll expenses



# Scenario #5 (b)– Answer

- Initiator creates an “Change Employment Status” eForm to put person on Leave
- Go to PM to create a new position to reflect the lower classification for leave replacement
- Ensure “event start” date reflects when the Position is to start and end
- Set Funding Info to Hire Data in Budget panel in PM
- Initiator creates a Hire eForm to hire an employee into the NEW position

## Note:

- If dates between PM and the eForm, Initiator will not be able to complete eForm
- Electronically routes eForms to department approver, then to Payroll
- Department goes to Hyperion Workforce and reviews monthly variance analysis
- As part of regular monthly financial review, department reviews actual payroll expenses



# Scenario #6 – Temporary Promotion

A staff member is being temporarily promoted to fill a vacancy due to mat leave. The temporary promotion is to the same classification as the person on mat leave.

*Referring to the process flow document, where would you start and what steps would be required? Walk us through the process flow document.*



a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA

## Scenario #6 – Answer

- Initiator creates eForm to put employee on maternity leave – select “Change Existing Status”
- Position must be posted through eRecruit because this is a 12 month period.
- Post position, review candidates, route resumes to interview panel, select candidate, generate offer letter, prepare successful candidate for hire “prepare for hire” in eRecruit

Note: Use existing position to complete hire in eRecruit (PM allows for 2 employees to be in position when one is on leave)



# Scenario #7 – Reappointment

A faculty member in a 1 year term appointment is being reappointed for an additional year.

*Referring to the process flow document, where would you start and what steps would be required? Walk us through the process flow document.*



a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA

## Scenario #7 – Answer

- Go to PM and change “Position End Date” on Position Information panel and Budget panel
- Initiator completes eForm to extend faculty for additional year (current process is done via paper until eForms is rolled out for faculty)
- Department goes to Hyperion Workforce and reviews monthly variance analysis
- As part of regular monthly financial review, department reviews actual payroll expenses



## Scenario #8 – Pool Budget

Due to reorganization, a department anticipates backlogs to occur several times during the upcoming fiscal year. To address these backlogs they want to set up a budget in anticipation of hiring temporary clerical staff at sporadic times as needed.

*Referring to the process flow document, where would you start and what steps would be required? Walk us through the process flow document.*



a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA

# Scenario #8 – Answer

- Go to PM to create a “Pooled Position”:
  - Under Position panel, “Type”, check “Pool Posn”
  - Change “FTE” and “Head Count”
- Under Budget panel set Funding info to “Budget Funded” and “Posn Data”

Note: Be cautious of dates entered into PM – Event Start Date usually defaults in at the current date, but this can and should be changed to reflect the start date of the position.



# Questions



a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA



a place of mind

THE UNIVERSITY OF BRITISH COLUMBIA