# HUMAN RESOURCES RELEASE NOTES – SEPTEMBER 2018

This document explains new product enhancements added to the ADMINS Unified Community for Windows **HUMAN RESOURCES** system.

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### 1. WHO IS LOCKING A RECORD ON THE UPDATE SCREEN? [New]

**ADMINS** is pleased to announce a new feature that will identify who you are record-locked with on a new record-locking screen. When a record-lock occurs, a popup screen will appear as shown in Figure 1. Click on **[OK]**.



Figure 1 Popup notification that a record is locked

- 1. The system will display a new screen providing information needed to contact the user who is locking the record. The screen name will be supplied. See Figure 2.
- 2. Contact the user locking the record to ask them to exit the screen.
- 3. Click on the **[Return to Previous Screen]** button to return to the same record that was previously locked.



If the user cannot be contacted to exit the record, proceed to another task by clicking on the

([Home] button). From the home screen, use the menu to select another task.



Detailed information and examples are available in the new document, <u>HR-805 Locking</u> <u>Screen.</u>

Figure 2-New screen with information about who is locking a record and how to contact them

[ADM-AUC-SY-8063]

# 2. PAYROLL PROCESSING > Upload Positive Pay (Recon) File [Fix]

ADMNS corrected an error in the positive pay file that appeared when a check was issued and voided on the same date.

[MDT-SUP-SAPLAUC-1750]

# 3. EMPLOYEE MAINTENANCE ▶ [7 Salary] Add Historical Change [Fix]

💳 [AUC] 6444-Employee Maint	itenance [theresa]						- 0 ×
File Edit Ledgers Purchas	se Orders Accounts Payable	Fixed Assets Human Re	sources Budget	Collections Tax	× Motor Excise Misc Billin	ng System	Favorites Help
ы∭ ⊜ Б м + -	+ м 🖑 👾 🔍 🖬	🖼 🚼 🙂					
		Emp	loyee Mainte	enance		N	on File
Goto Em Actions	nployee Number <mark>200092</mark> Isition (T210POLDET -0	LYNN M LUSSIER POLICE DETECTIVE		1 Of 1 En	Employee Attachments (9) noloyee Positon Attachments		<b>&amp;</b>
Add Historical Salary Cha Mark for Delete	nange						
Add Employee Add Position	4 Add Wage	s S Payroll 6 Acc	ounting 7 Sala	ry 8 Dates/Clas	ss 9 Degrees 0 Cu	stom UAco	sidents VACA
Delete Employee	nit Schedul	e Grade Stp FTE	Annual Salary	Period Salary	Daily Salary Hourly Rate	Per Diem Tier#	Entry User
Delete Position	10 PO	1 6 1,0000	82430,40	1585,20	317.04 39.6300	317,04 1	THERESA
-	10 P0	1 5 1.0000	78644.80	1585,20	302.48 37.8100	302.48 1	GlobalChangeS
Reports	20 PO	1 5 1,0000	56334,24	1079,20	215,84 26,9800	215,84 1	THERESA
31-Aug-2017 31-Aug-2010	8 POLU -PO PO	1 4 1,0000	61339,20	1179,60	235,92 29,4900	235,92 1	THERESA
01-Aug-2017 31-Aug-2018	8 POLU -PO PO	1 3 1,0000	59550.40	1145,20	229,04 28,6300	229,04 1	THERESA

Prior to the software update, sites were using this feature to make changes to the *current salary*.

Changes to the *current salary* should only be made on the **[5 Payroll]** tab.

Now, only *historical* changes can be made on the **[7 Salary]** screen.

[ADM-AUC-HR-10,024]

# 4. BANK RECONCILIATION [Fix]



With the last software update, a change was made to the **Bank Account Management Listing** so that the report selection was dependent on the **[View]** shown in the screen; that is, one of the following:

- All Checks
- Outstanding Checks
- Cleared Checks
- Voided Checks

#### Figure 3 Before-the [3 Listing] button listed only the records available to view on the screen

Some sites reported that a cleared check report used for checkbook balancing were no longer available. A new button was added to the screen to allow the reports to be run in a similar way as before.

There are now two buttons on the screen – the **[3 Screen Listing]** button will produce a report that may be run to  $Excel^{\text{@}}$  or Print/Preview/PDF<sup>®</sup> and will list the same records that are on the screen. This report will be subject to the currently selected **[View]** radio button and any **Check Date restriction**.

💳 [AUC] 7110-Bank Accou File Edit Ledgers Pur 🖻 🛍 🎒 🖨 🙌	unt Management [theresa] rchase Orders Accounts Payable 수 하 배 偻 꼭 Q 드	Fixed Assets Human Resources	Budget Collections Tax Mo	tor Excise Misc Billing Syster	— ⓓ X m Favorites Help
Goto E	Bank: Payr	Bank Accou	int Management		
3 Screen Listing 4 Edit Listing 5 Man Clear 6 To Bank	PAYROLL - CITIZENS BANK	Last Ck# 0092537	View F All Checks F Outstanding Checks Cleared Checks Voided Checks	testrict View to Check Date rom To	
1 Check 2 V 0012019 21-	Varrant Check Date Printed CkDate -Jun-2018 21-Jun-2018	Type Warrant Payable To Void 903070 ABBOTT, KARE	N	Amount -52,58 21	Cleared I-Jun-2018

Figure 4 After- [3 Screen Listing] and [4 Edit Listing] buttons

The **[4 Edit Listing]** button will **require** the user to enter the **Warrant Check Date** range. If desired, an *optional* cleared date range may be entered, useful for creating clearing reports when reconciling bank statements. This



report selects records without respect to the on-screen selections above. The **Warrant Check Date** range is now required to make the report run much *faster*.

📧 Task 6649: Bank Management Edit List	×
Bank Management Edit List	
Required: Check Date Range (mmddyyyy)	From: 05162016 To: 05312018 Warrant
Optional: Cleared Date Range (mmddyyyy)	From: To: Date
Include:	All Outstanding O Cleared O Voided     Range
Run as  Preview Print PDF  If Printing use Duplex  Yes No Lookup	Excel OK Cancel Clear All

Note: it is possible to have a **printed** check date that is after the **cleared** date. (The check may be cashed prior to the printed check date.)

[ADM-AUC-HR-10,017]

# 5. REPORTS

The **[2 Personal]** tab on the employee maintenance screen has two fields available, **Reporting Location** (a 50 character alphanumeric field) and **Location Grade** (a 20 character alphanumeric field).

	Employee Maintenance
Gato	Employee Number 207073 KAREN KIM GELINAS Employee Attachments (3)
Actions	
I Add Employee P Add Position	Current Positions S010ABATECH-01 APPLIED BEHA
1 Contact	Personal 3 Ded/Ben 4 Add Wages 5 Payrol 6 Accounting 7 Salary 8 Dates/Class 9 Degrees 0 Custom
Reporting I Location G	ocation SOUTH STREET SCHOOL Type Tax Table Exempt

These fields are free form text fields; as such, no lookup is available. The use of these fields varies from site to site.

#### 5.1. 6710–Employee List [Enhancement – Columns added to Excel<sup>®</sup> Version]

ADMINS added the **Reporting Location** and **Location Grade** as the last two columns to the Excel<sup>®</sup> version of 6710–Employee List.

Δķ	49 👻 💿	fx									Reporting Location	Location Grad
A	B	С	D	E	F	G	Н	1	J		SOUTH STREET SCHOOL	
								Position	EEO/Original		PRESCSHOOL	P
Emp#	Name	Position#	BargUnit	Entity	PayGrp	TimeshtGrp	MÆ	<u>HireDate</u>	<u>Hire Date</u>	Race		
007073	GELINAS, KAREN KIM	S010ABATECH-01	AFLABA12-MOEL	. 1	12 MTH	SCHOOL-ABA	F	31-Aug-2010	05-Sep-2001	Cauc	HIGH SCHOOL	9-12
007084	MANDOSA, LYNN E	S010ABATECH-01	AFLABA12-MOEL	0	12 MTH	SCHOOL-ABA	F	27-Sep-2010	27-Sep-2010	Cauc	ELEMENTARY SCHOOL	3-8
007672	HALLIWELL, MARIE L	S003ABATECH-01	AFLABA12-MSEC	1	12 MTH	SCHOOL-ABA	F	27-Aug-2013	22-Jan-2004	Cauc	CHAIRER LANE DRIMARY COHOOL	0.0
007784	BOULTENHOUSE, MARIE A	S005ABATECH-02	NON-NO		WE	SCHOOL-ABA	F	01-Sep-2010	08-Mar-2006	Cauc	SHAKER LANE PRIMARY SCHOOL	P-2
007852	LANDRY, KAREN B	S010ABATECH-01	AFLABA12-MOEL	1	12 MTH	SCHOOL-ABA	F	25-Aug-2010	04-May-2009	Cauc	RUSSELL STREET ELEMENTARY SCHOOL	3-5
007867	GUERIN, KAREN M	S010ABATECH-01	AFLABA12-MOEL	1	12 MTH	SCHOOL-ABA	F	31-Aug-2010	10-Nov-2009	Cauc	RUSSELL MIDDLE SCHOOL	6.0
010650	MAYER, KAREN M	SU05ABATECH-02	NON-NO	1	VVE	SCHOOL-ABA	F	11-Oct-2016	11-Oct-2016	Cauc	RUSSELL MIDDLE SCHOOL	0-0
010697	COMPTON, LYNN K	SUU9HOMESER-U1	NON-NO	1	VVE	SCHOOL-ABA	F	01-Jul-2010	01-Jul-2010	Cauc	HIGH SCHOOL	9-12
010699	INVEU, MARIE A	SUUSABATECH-02	NON-NO	1	VVE	SCHOOL-ABA	r	04-Peb-2015	04-Feb-2015	Cauc	LITTLETON HIGH SCHOOL GYMNASIUM	0.10
010002	EDEDDICKOON KADEN E	SUUSABASUBS-UI	NON-NO	1	AD MALE	SCHOOL-ABA	r	01-0ct-2017	03-Dec-2013	Asiar	EITTEETON HIGH SCHOOL OTMINASION	3-12
070101	CRAV LVANCE	SUUSABATECH-UT	AFLABA12-MOEL	5	12 MIH	SCHOOL #B#	r	13-Sep-2012	13-Sep-2012	Cauc	SHAKER LANE PRIMARY SCHOOL	P-2
070130	HACEPTY LYNNIC	SODE # DATECH 02	NON NO	5	12 19111	SCHOOL ABA	F	18 Sep 2013	14-Dec-2010	Cauc	RUSSELL STREET ELEMENTARY SCHOOL	3.5
070225	LONG MARE	S005ABATECH-02	AELABA12 MOEL	4	12 MTH	SCHOOL ABA	F	30 Aug 2011	06 Sep 2011	Cauc	RECORE CHART COMON	
h70249	GRAVEL MICHAEL N	S009HOMESER-01	NON-NO	5	10E	SCHOOL-ABA	M	23-Jun-2014	23-lup-2014	Cauc	MIDDLE SCHOOL	6-8
070249	GRAVEL MICHAEL N	S006ABATECH.01	AFLABA12,MSEC	5	12 MTH	SCHOOL-ABA	M	30-400-2016	17-Oct-2011	Cauc		
670282	VADENAIS MARIE	S005ABATECH.01	AFLABA12-MOEL	5	12 MTH	SCHOOL-ABA	F	09-Feb-2012	09-Eeb-2012	Cauc		

If no data is entered in the field(s) on the employee maintenance record, the row will be blank on that field. No selection is available on the prompt for these fields, as free–form text fields are not based on a table.



#### 5.2. 6714–Employee List - Grade Schedules [Enhancement – Columns added]

**ADMINS** added four columns to the Excel<sup>®</sup> version of **6714–Employee List–Grade Schedules**. (*The image below hides some of the columns in the spreadsheet to show the four new columns.*)

- **1.** EEO/Original Hire Date (column "R")
- 2. Position Hire Date (column "S")
- **3.** Reporting Location (column "BC")
- 4. Location Grade (column "BD")

🕅   🔚 🤊 • (° -   -			EmployeeList_Grade_6714_THE	
File Home Insert Page Layo		2 S	3 BC	4 BD
BF17 • (* f*	<u>OrigHireDt</u>	<b>PosHireDate</b>	Reporting Location	Location Grade
A B Posit	01-Jul-2010	01-Jul-2010	HIGH SCHOOL	9-12
2 COMPTON, LYNN K S009	18-Sep-2017	18-Sep-2017		
3 HAGERTY, LYNN C S005, 4 GRAVEL MICHAELIN S009	23-Jun-2014	23-Jun-2014		
5 BOULTENHOUSE, MARIE A S005.	08-Mar-2006	01-Sep-2010	ELEMENTARY SCHOOL	3-8
6 MAYER, KAREN M S005. 7 TRIVEDI MARIE A S005	11-Oct-2016	11-Oct-2016	RUSSELL MIDDLE SCHOOL	6-8
8 PELOQUIN, MARIE A S005	04-Feb-2015	04-Feb-2015	LITTLETON HIGH SCHOOL GYMNASIUM	9-12
9 BROOKS, MARIE E S005, 10 TREBINO MARIE I S005	26-Sep-2017	26-Sep-2017		
	16-Mar-2015	16-Mar-2015		
	07-Mar-2017	07-Mar-2017		

Figure 5 Report #6714, Employee List-Grade Schedules with four new columns

[PCS-SUP-SAPLAUC-610] [MBE-SUP-SAPLAUC-967]

## 6. TABLES ▶ Pay Code Table ▶ Allow Higher % of Hourly Rate [Fix]

To allow for a vacation code calculation for employees working 21 hour shifts, the limit on the % of the hourly rate field was changed to 2400.000.

		Pay Code Table
Goto Actions	Pay Code V21 Firefighters :	21 Day shift
- Summary-PayCheck Summary-Benefit St	1 Calculation 2 Base Buckets	3 Detail Billing
5 Add New Copy This Code 6 Edit List 7 Detailed List 8 Detail Billing List	Paycheck Category ACCHII VACATION Account Number Benefit Statement Category	LEAVE 0-**-00-51260
Category Tables 9 Paycheck 0 Benefit Statement Category Report	Units O Days O Hours O Per Diem	10     Leave type Cube WHLH LW vacation       Leave Post Type     Accrued       Porfeit     Paid Out        Yes     No       2400.000     Yes
Added 16-Feb-2012	By MOORE Changed 31-Aug-2018 by THERESA	Status: Pay Code Active Lkup

Figure 6 Pay Code Table % of Hourly Rate will accommodate 21 day shifts



If a value in excess of 2400.000 is entered, an error message will pop up showing the range of allowable values.

[ADM-AUC-HR-10,023]

# 7. SITE SPECIFIC > CT Teachers Retirement Bureau (TRB)

OK

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Some sites want to show the **CT Teachers Retirement Bureau (TRB)** deductions separately on the payroll checks using different paycheck categories. The **CT TRB** report has been enhanced to allow for multiple **TRB** categories to accommodate this change. Select **Human Resources** Site Specific CT TRB Reporting to access this feature.



The system will save the categories from the prior run for each user who runs the report.

The report and file format remains the same; the categories are now included to accommodate the additional deduction categories appearing on the payroll checks.

Figure 7 A minimum of one and up to nine categories may be specified

[MAN-SUP-SAPLAUC-578]

#### 8. HELP REFERENCE LIBRARY

The following new and updated documents were added to the help reference library:

#### 8.1. New and Updated Documentation

• OTHER

HR–805 Locking Screen HR–895 Bank Table [New] [New to this Library]