Munis Human Resources and Payroll

Major Enhancements
Version 10.3
March 21, 2013

For more information, visit www.tylertech.com.

TABLE OF CONTENTS

Munis Human Resources and Payroll

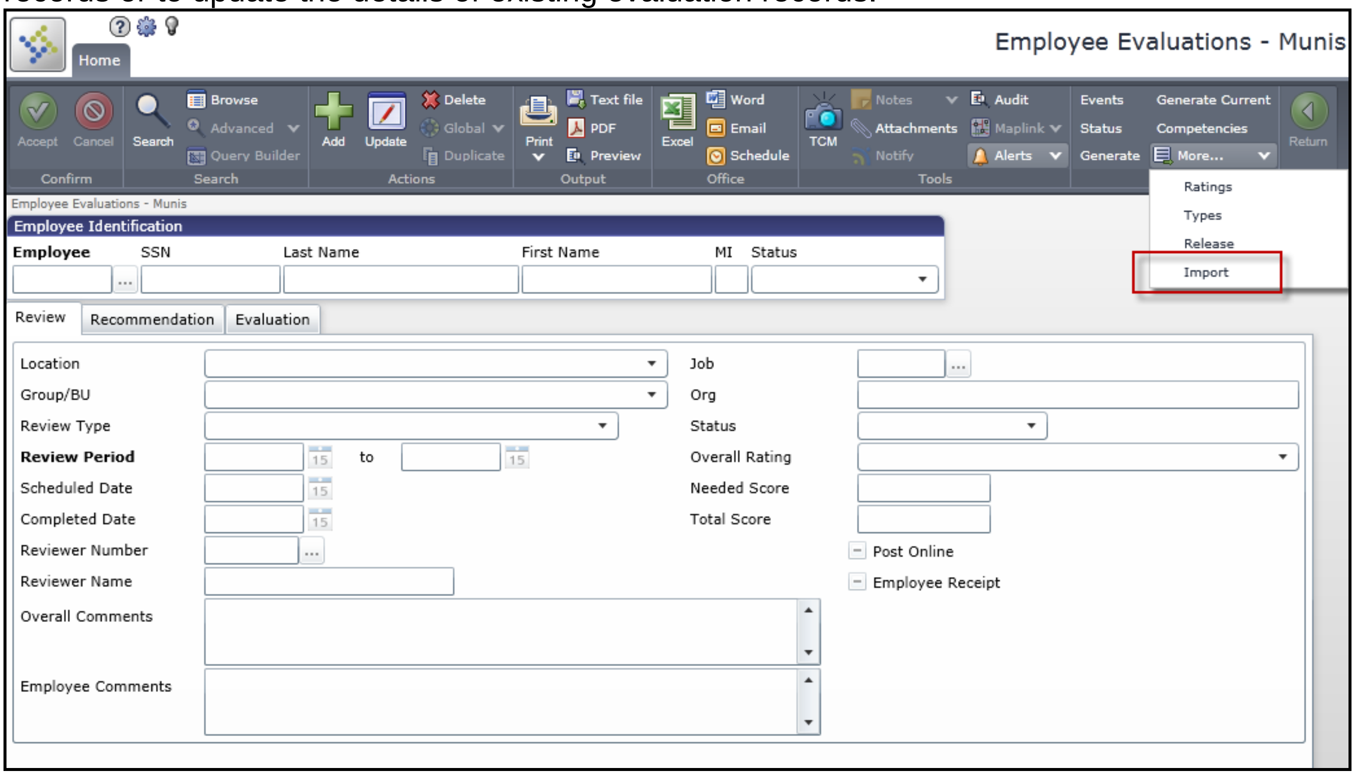
This document provides an overview of the major HR/Payroll enhancements for Munis Version 10.3. The Munis Human Resources and Payroll product includes Employee Self Service (ESS).

Human Resources

The following changes apply to Munis Human Resources programs.

Employee Evaluations

The Import option in the Employee Evaluations program enables you to import new evaluation records or to update the details of existing evaluation records.



The fields imported by this function are determined by a customizable import form definition.

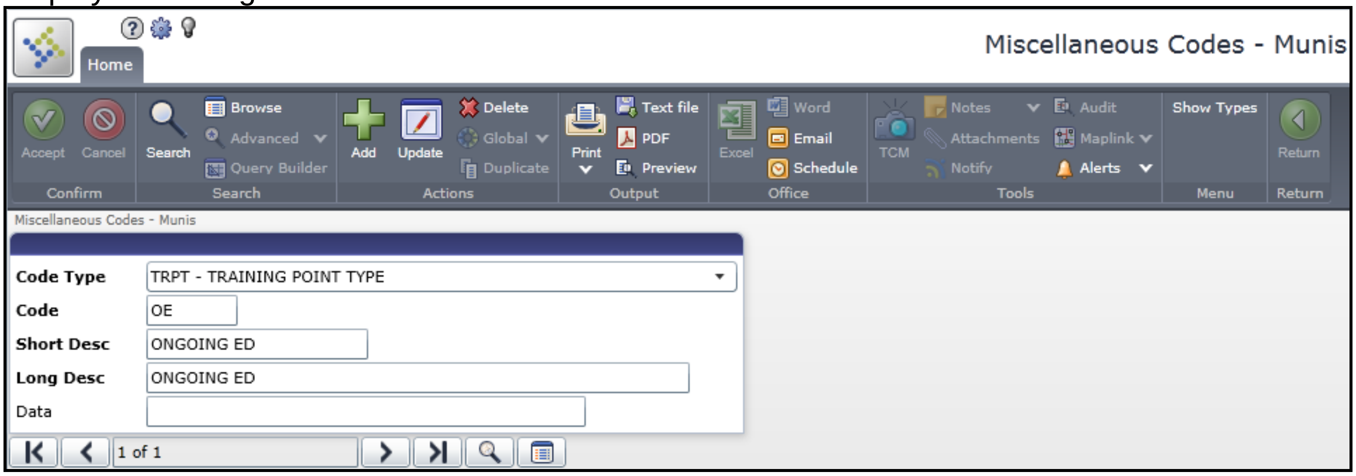
Employee Training

The Employee Training programs have been expanded to include a points system for tracking employee training and functionality to accommodate guest training.

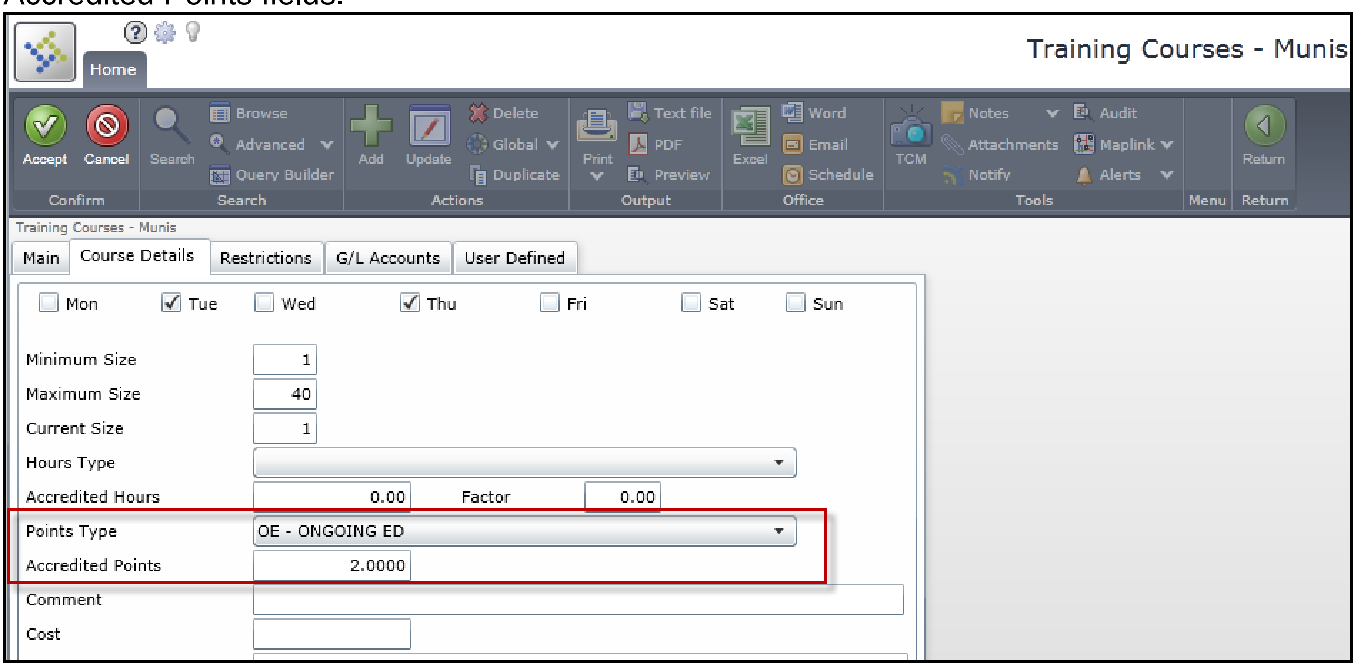
Training Points

The training-points functionality tracks employee training by a points system. This functionality can be used, for example, to track employee progress toward qualifying for re-certification as well as to grant that re-certification.

The training-points functionality includes the Training Point Type code in the Payroll Miscellaneous Codes program, which you can use to define types of points to use for tracking employee training.

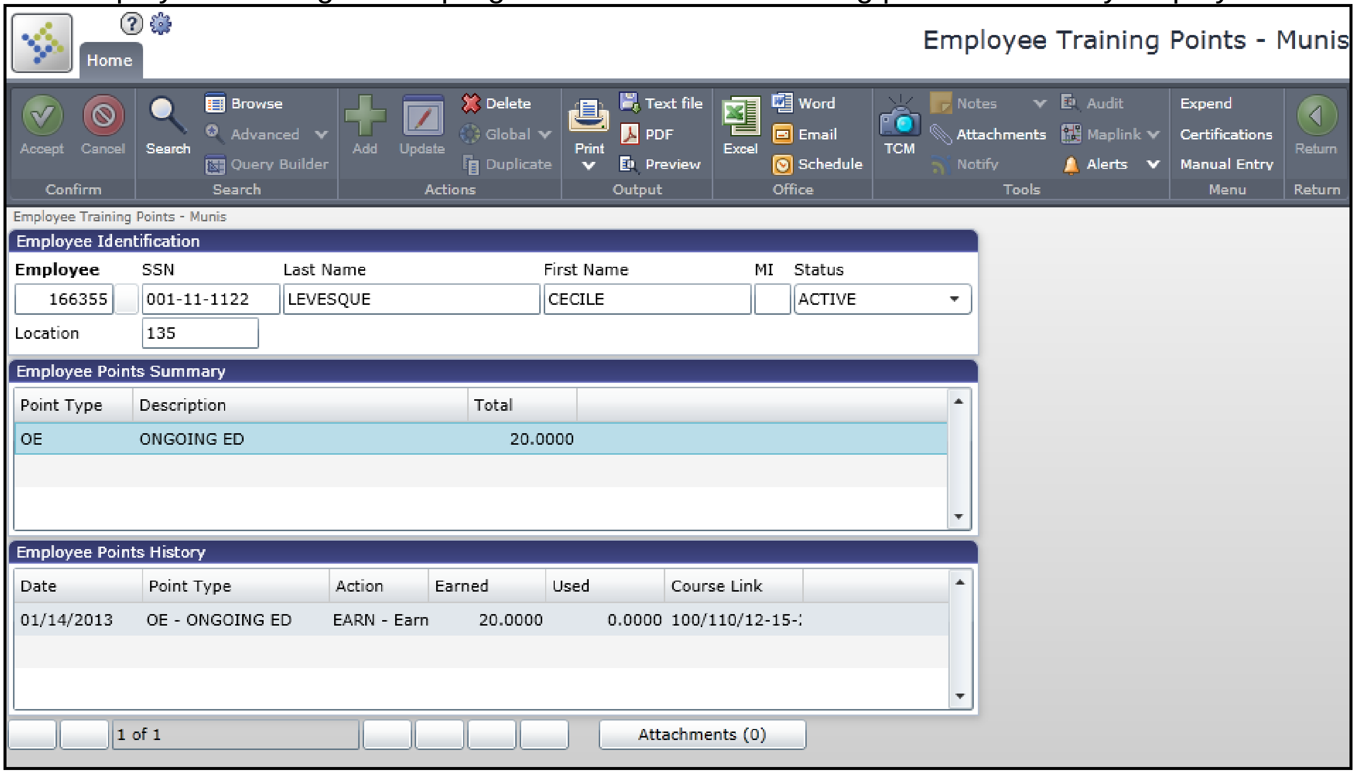


In the Training Courses program, the Course Details tab includes the Points Type and Accredited Points fields.



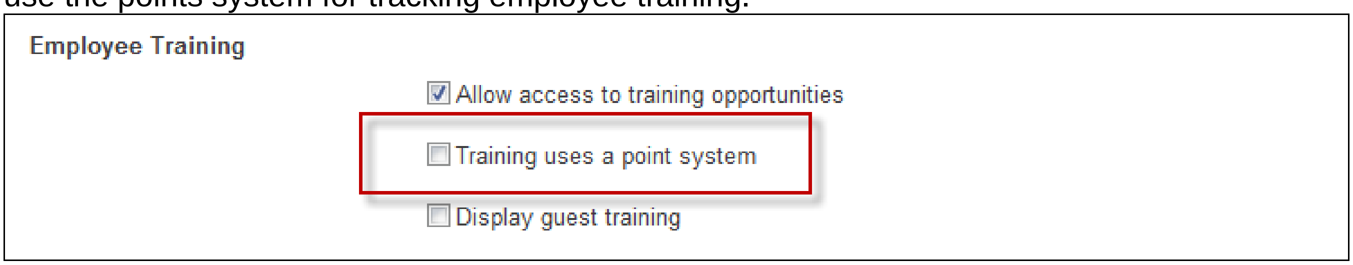
The Points Type list defines the type of points that employees earn by completing the active course, for example, a college course or specialized skill training course. The Accredited Points box defines the number of accredited points the employee earns for completing the course, if the course is accredited.

The Employee Training Points program maintains the training points earned by employees.

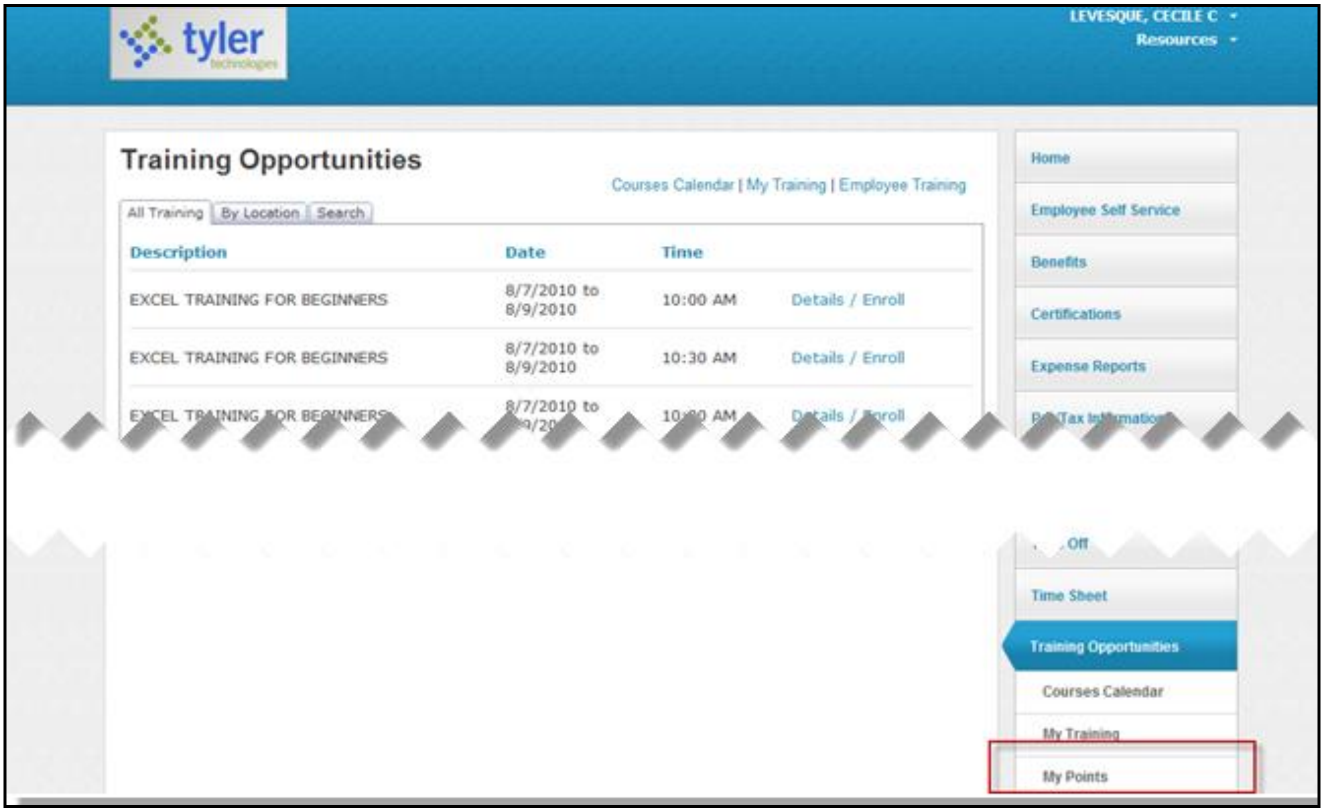


The Employee Training Points Inquiry program provides all employee-training point records in a display-only format.

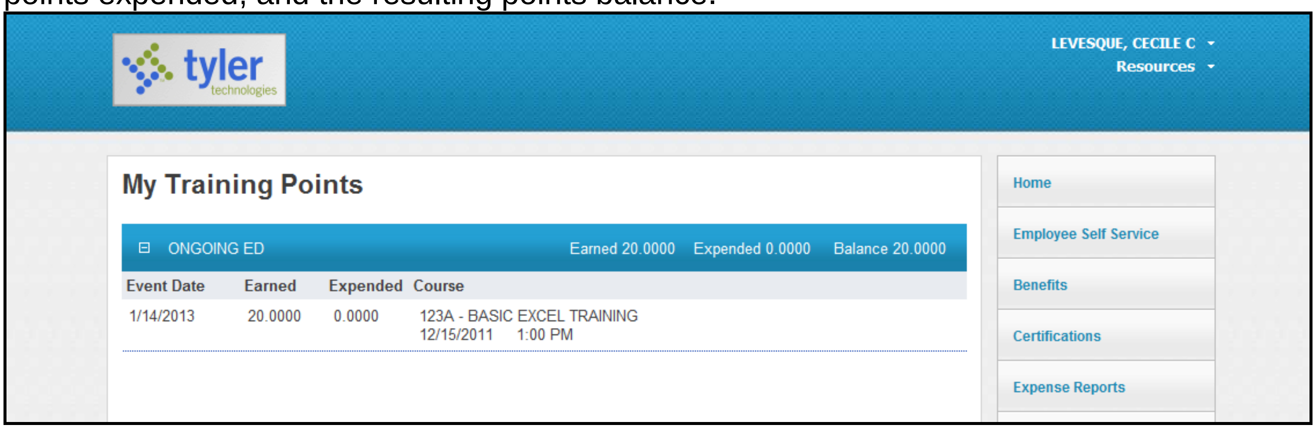
The training-points functionality is fully integrated into ESS. On the Application Settings page in ESS Administration, the Training Uses a Points System check box indicates that ESS should use the points system for tracking employee training.



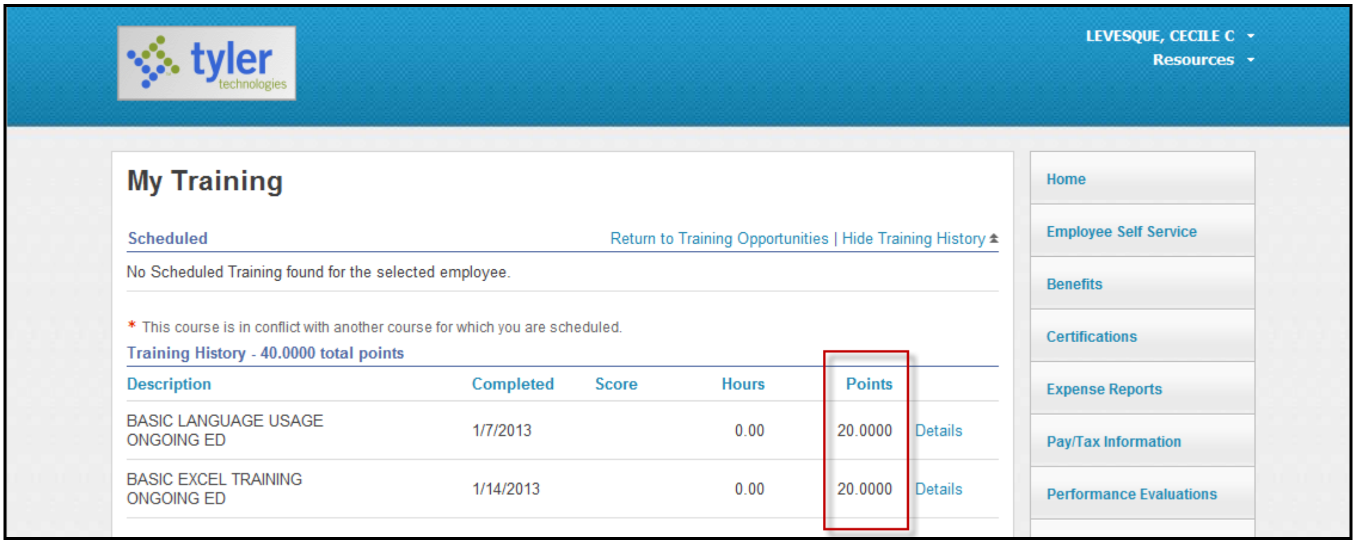
When you configure ESS to use points, the My Points option is available under Training Opportunities on the ESS menu.



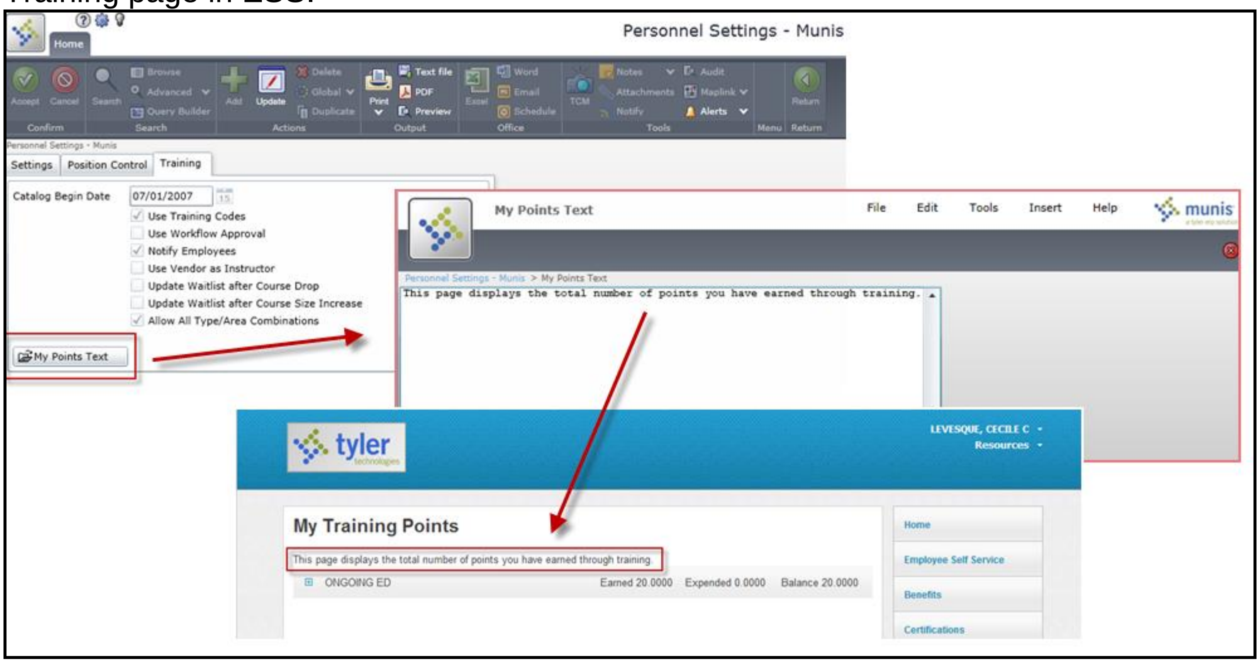
When employees click My Points, the program displays the My Training Points page, which displays previous courses organized by points type. In addition, it displays points earned, points expended, and the resulting points balance.



The My Training page displays the employees' points information and hours information. When you do not configure ESS to use a points system, the page displays only hours information.

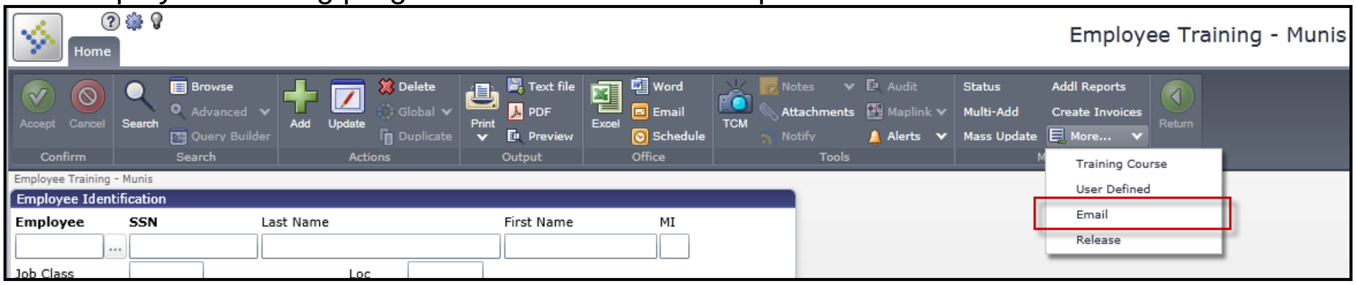


In the Personnel Settings program, the My Points Text option displays the My Points Text screen, where you can where you can view or update the instructional text included on the My Training page in ESS.

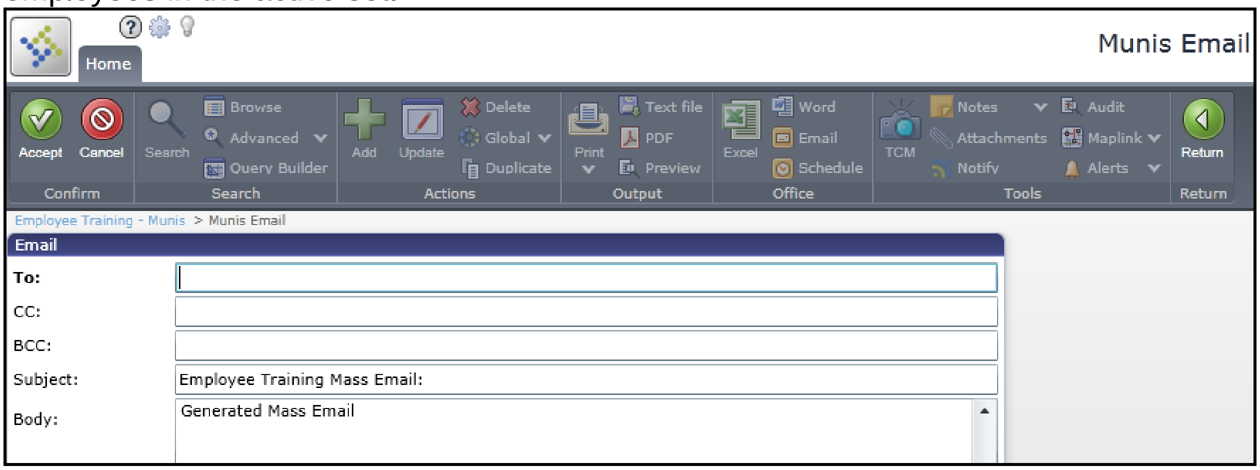


Employee Training

The Employee Training program includes the Email option.



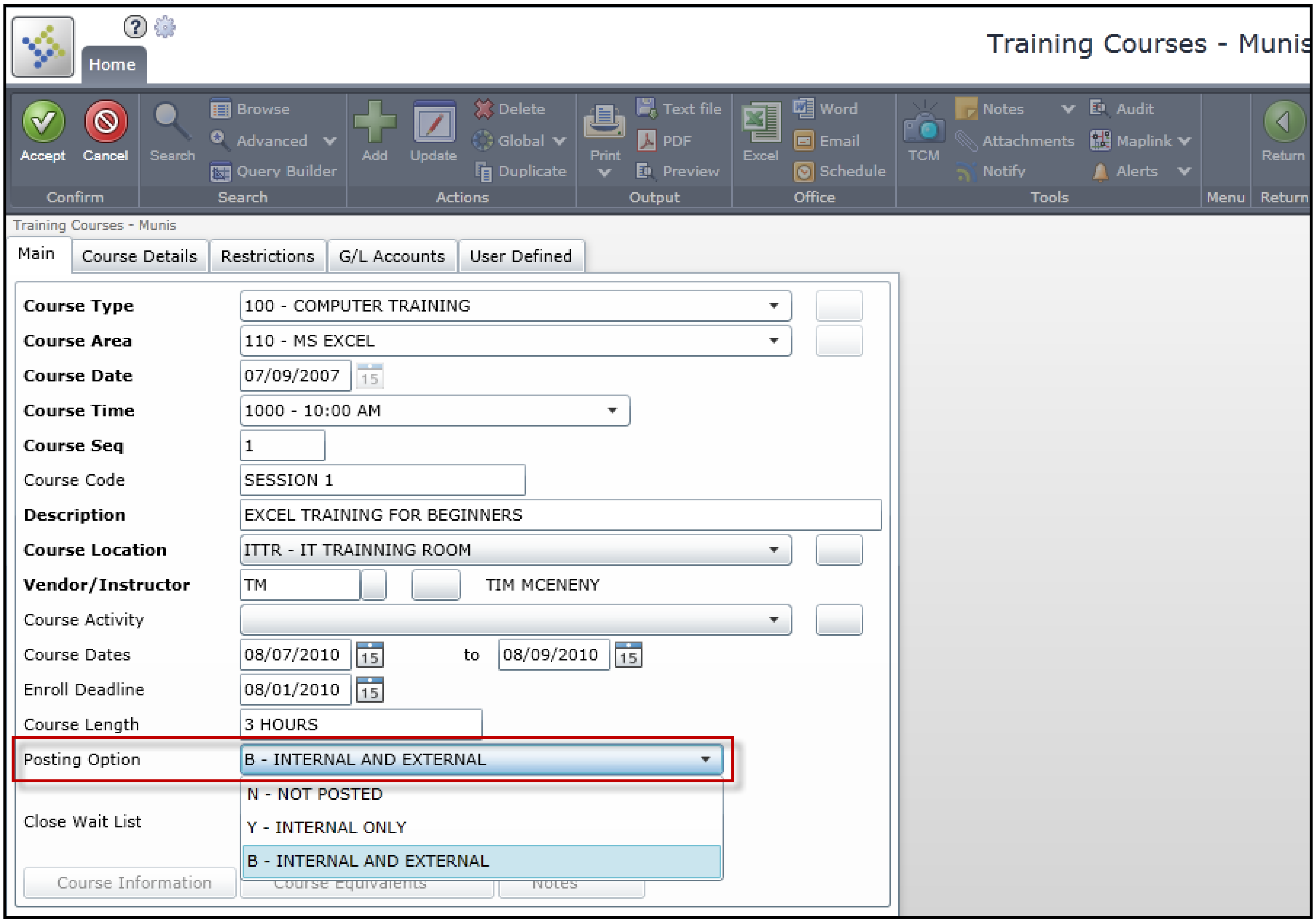
Click Email to display the Munis Email screen, where you can write and send an email to all employees in the active set.



Guest Training

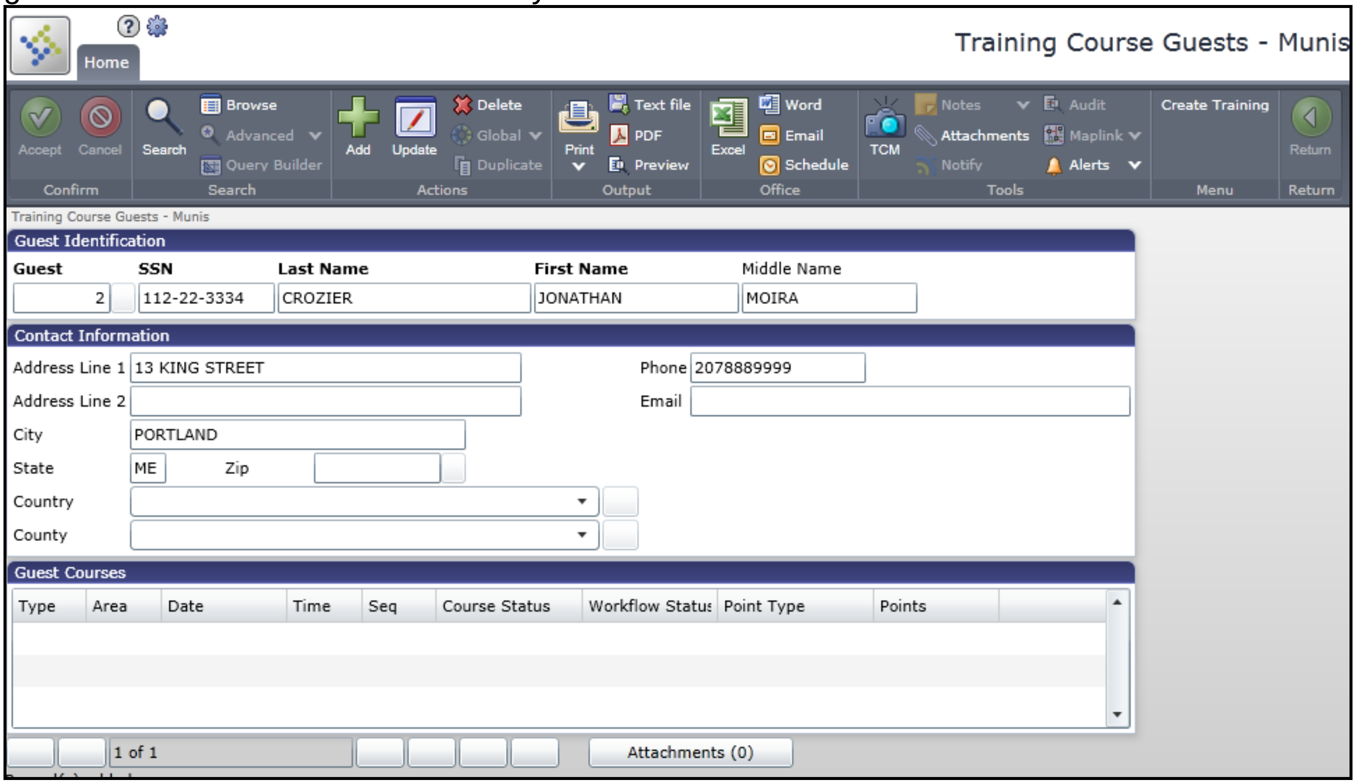
The guest-training functionality in the Employee Training programs enables you to make courses available to individuals who are not employees of your organization.

To configure guest training, select the Posting Option list on the Main tab of the Training Courses program.



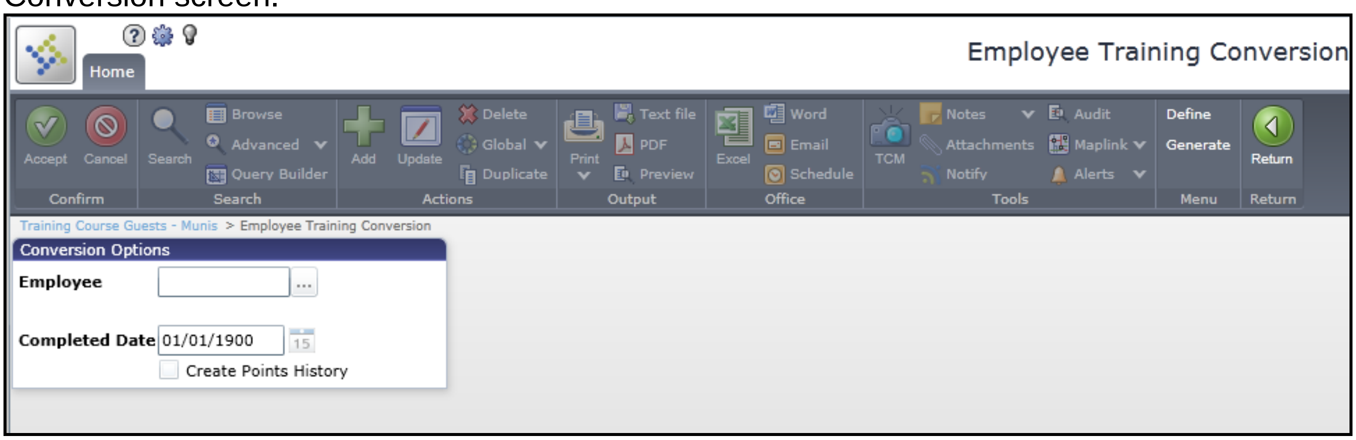
The Posting Option list indicates who can view the course in ESS. Use the B – Internal and External option to specify that the course is available to both employees and individuals who are not employees, or guests.

The Training Course Guests program maintains records for training guests, including their general information and course history



Guest records created and added to a course are accommodated within the existing waitlist functionality, and are included in report generation or when calculating the occupancy of a course.

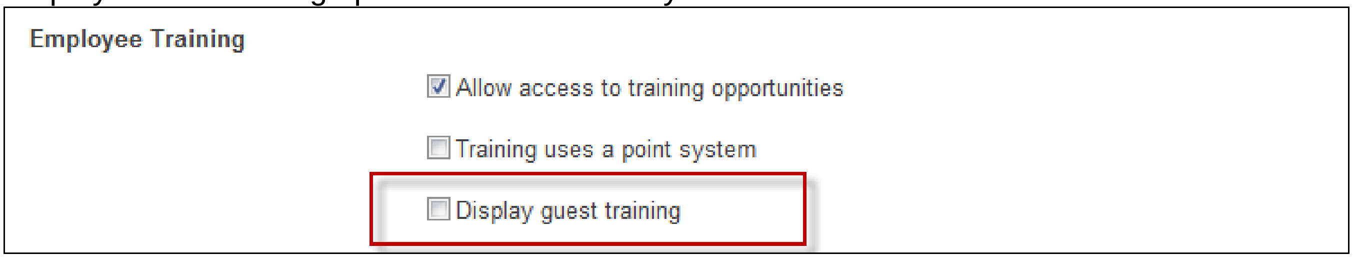
When a guest record is active, click Create Training to display the Employee Training Conversion screen.



This screen allows you to create employee training records for the guest. An employee record must already exist for the guest before training records can be created.

The Training Course Guests Inquiry program provides all guest training records in a display-only format.

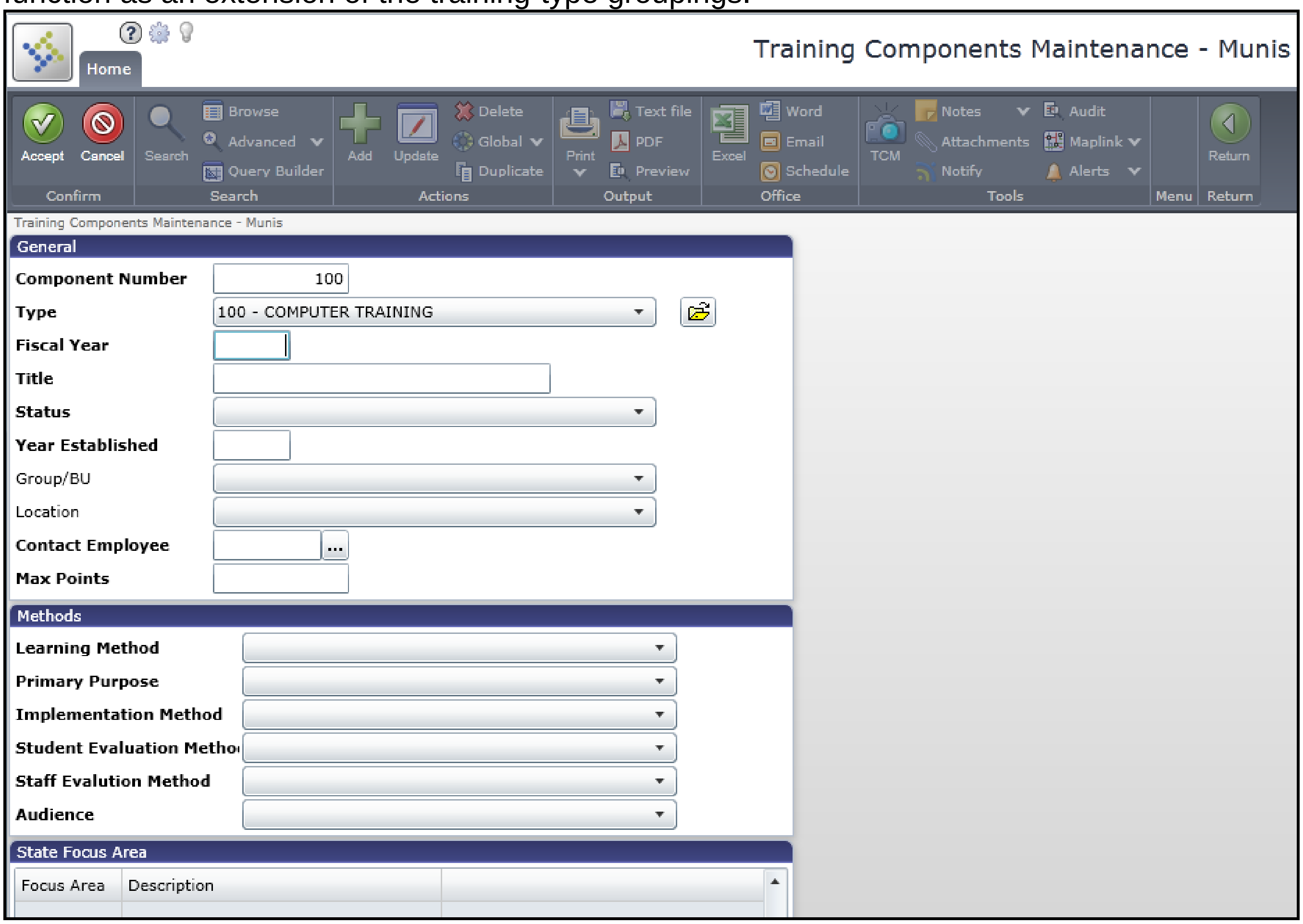
The guest training functionality is fully integrated into ESS. When the Display Guest Training check box is selected in the Employee Training group on the Application Settings page in Employee Administration, guests can view courses that have been marked as external. The Display Guest Training option is not selected by default.



Guests can view the details for a training course, but they cannot enroll. To enroll, guests must email the course contact.

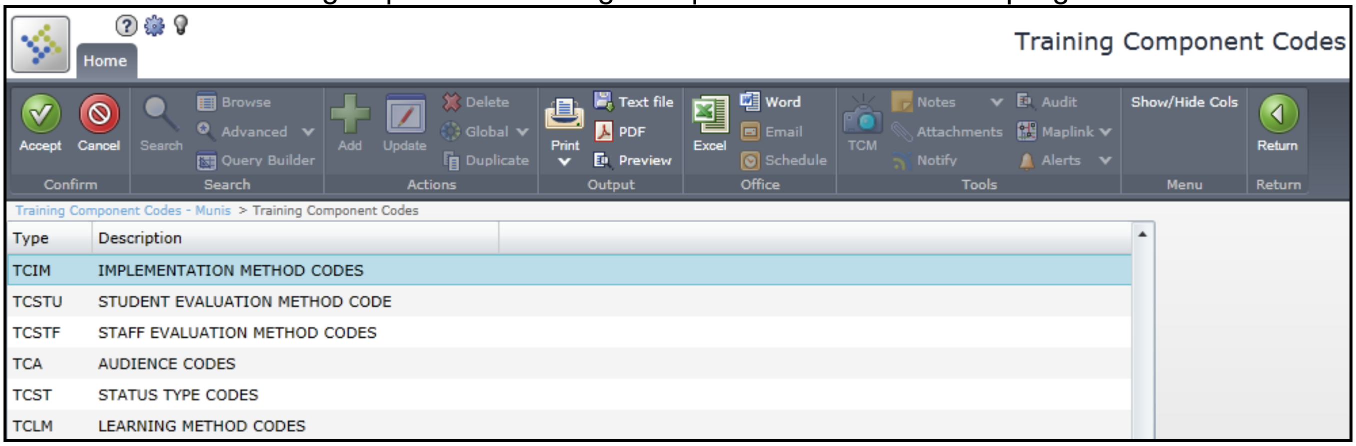
Training Components

The Training Components Maintenance program creates and maintains course groupings that function as an extension of the training-type groupings.



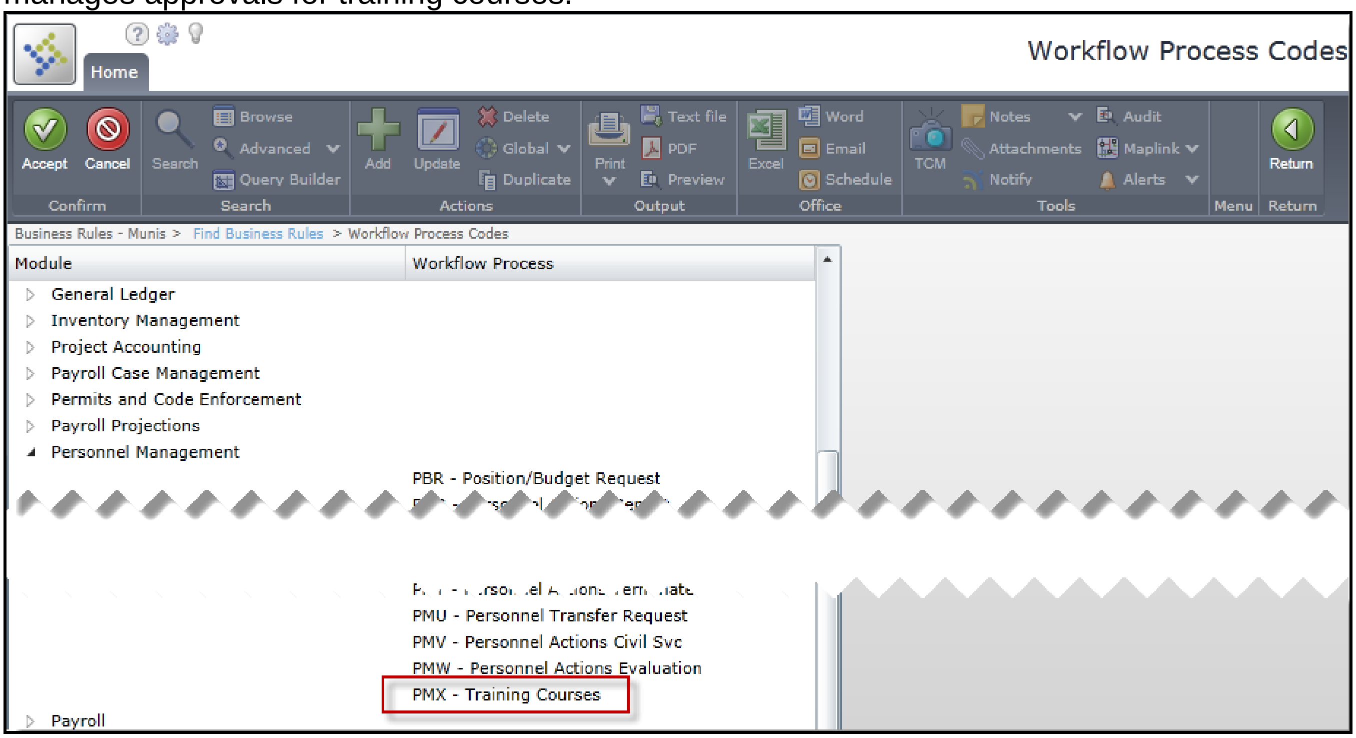
Training components are defined by fiscal year and include lists, such as Learning Method, Audience, and Audience, that allow you to select from user-defined values. Use the Training

Component Codes program to define the options that are available on the lists in the Methods and State Focus Area group in the Training Components Maintenance program.

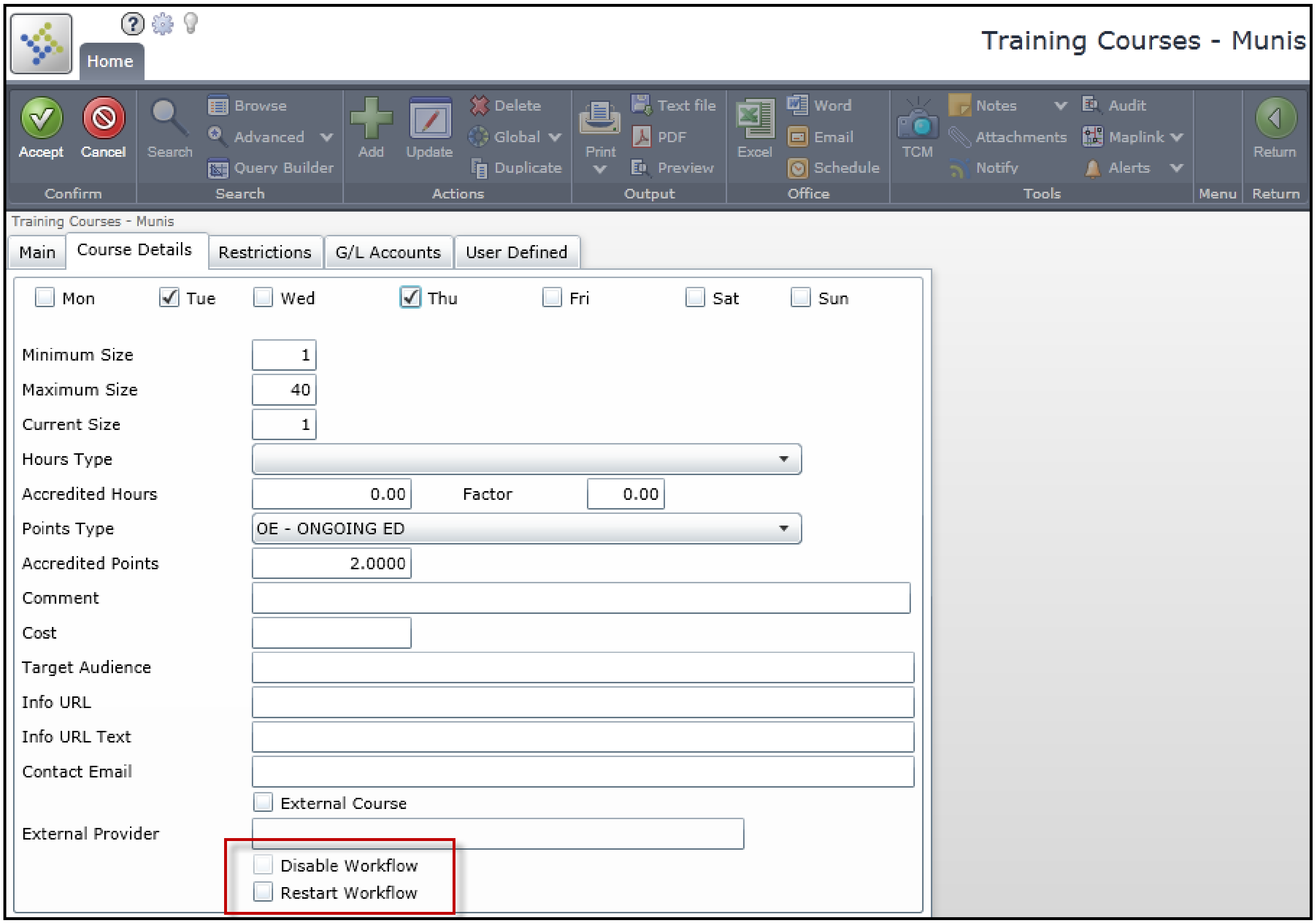


Training Workflow

In the Workflow Business Rules program, the PMX – Training Courses workflow process manages approvals for training courses.



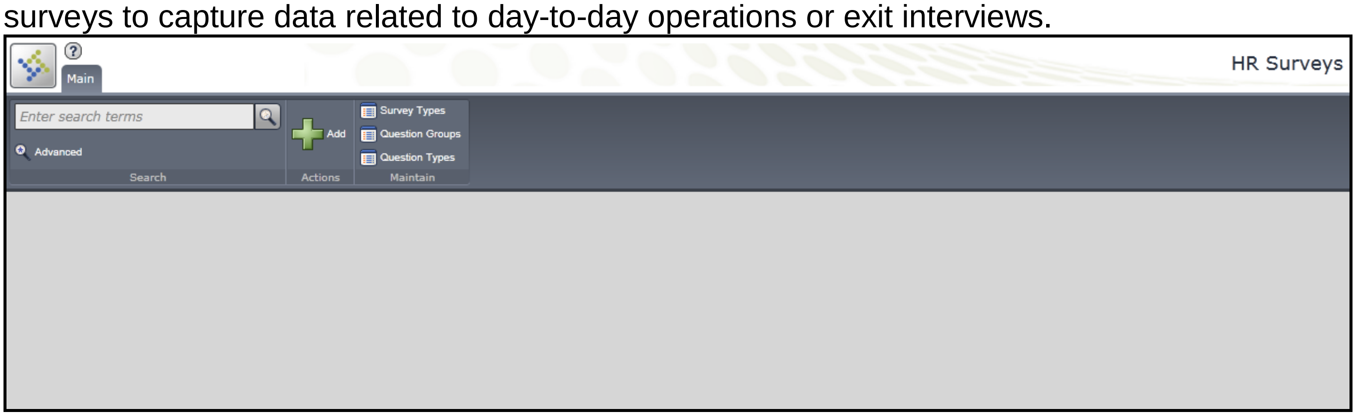
The Training Courses program includes the Disable Workflow and Restart Workflow check boxes.



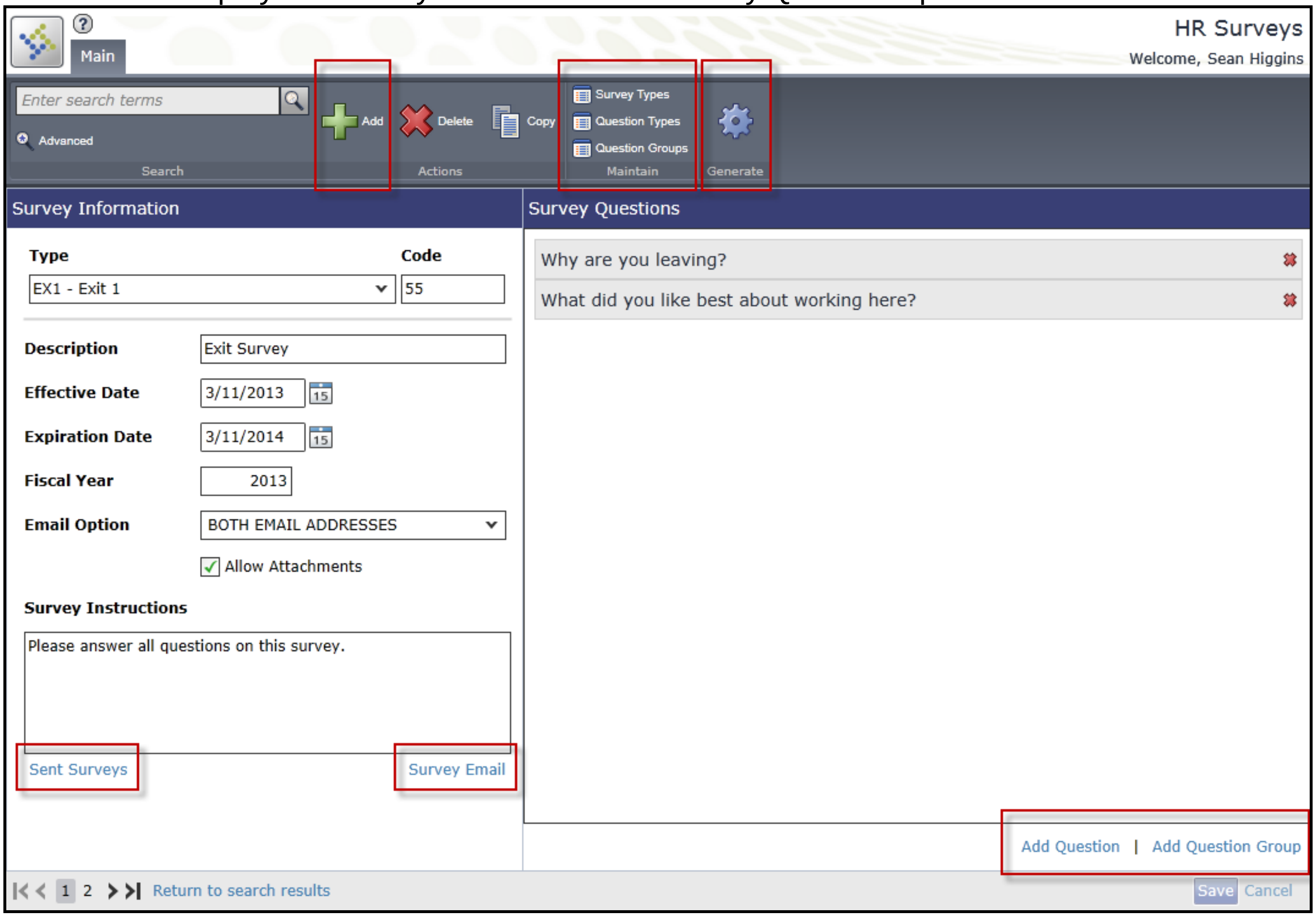
If you have the proper permissions, select the Disable Workflow check box to temporarily stop the workflow process for the course, for instance to add an employee to the course from the waitlist. Select the Restart Workflow check box to enable the workflow process.

HR Surveys

The HR Surveys program allows you to create, deliver, and track survey-related questions and answers for employee interviews. Using this program, you can create generic or job-specific surveys to capture data related to day-to-day operations or exit interviews.



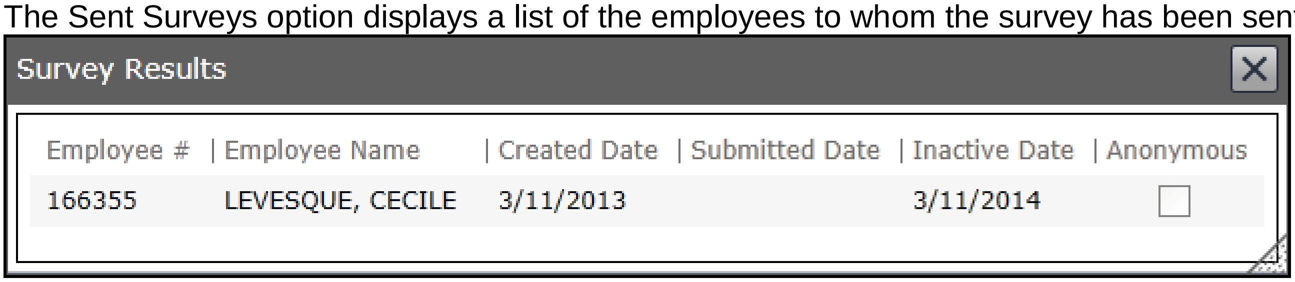
Click Add to display the Survey Information and Survey Questions panes.



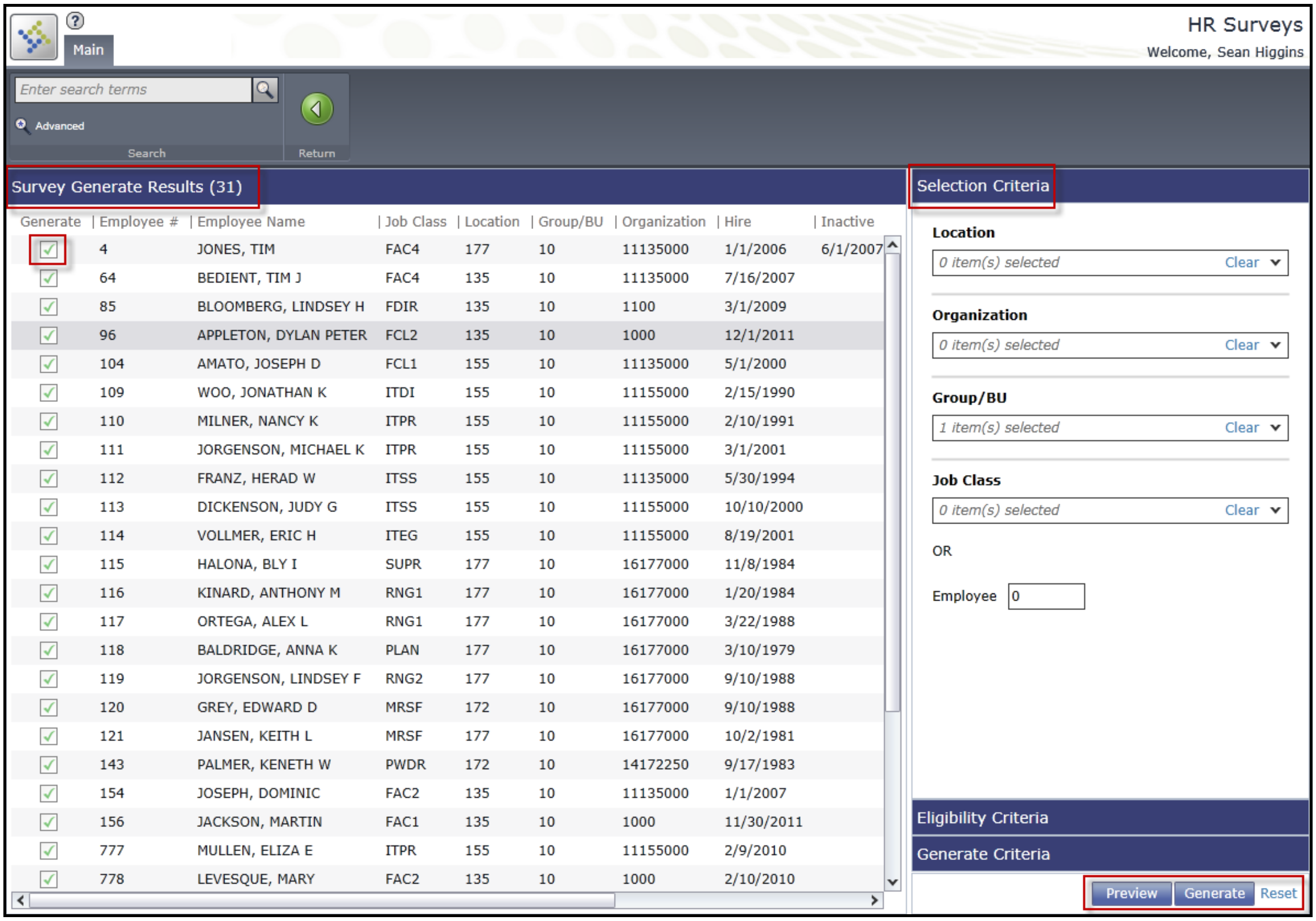
The Survey Types, Question Groups, and Question Types options maintain standard survey information that can be used in any survey. The Add Question and Add Question Group options define the questions for a specific survey. When you add a question, available answer data types include date selection, text, decimal, and multiple choice.

The Survey Email option maintains the text of email messages distributed to employees to whom the survey applies. Each employee's survey email message includes a link to the survey in ESS.

The Sent Surveys option displays a list of the employees to whom the survey has been sent.

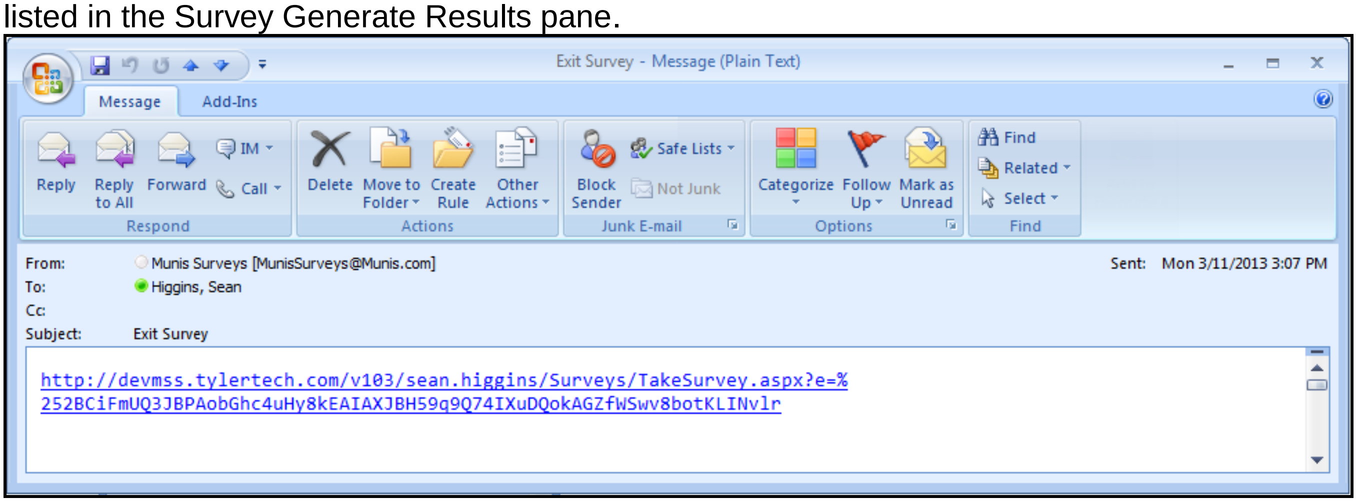


The Generate option displays the Selection Criteria and Survey Generate Results panes, which allow you to select and preview the employees to whom a survey will be sent.

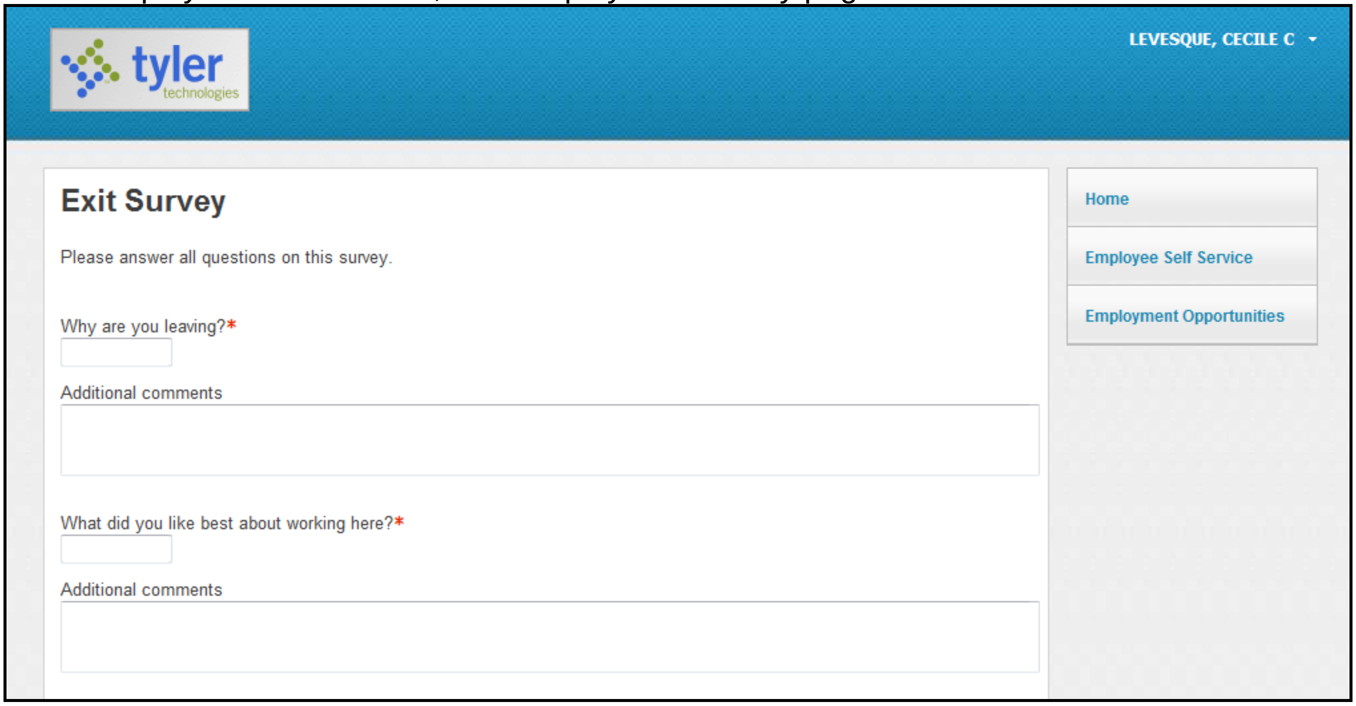


Define the options in the Selection Criteria pane and click Preview to view a list of the employees who fit those criteria. To exclude a specific employee from the survey distribution, clear the Generate box for that employee in the Survey Generate Results pane. The Reset option clears all entered selection criteria.

The Generate option generates both the survey and the email you defined for the employees listed in the Survey Generate Results pane.



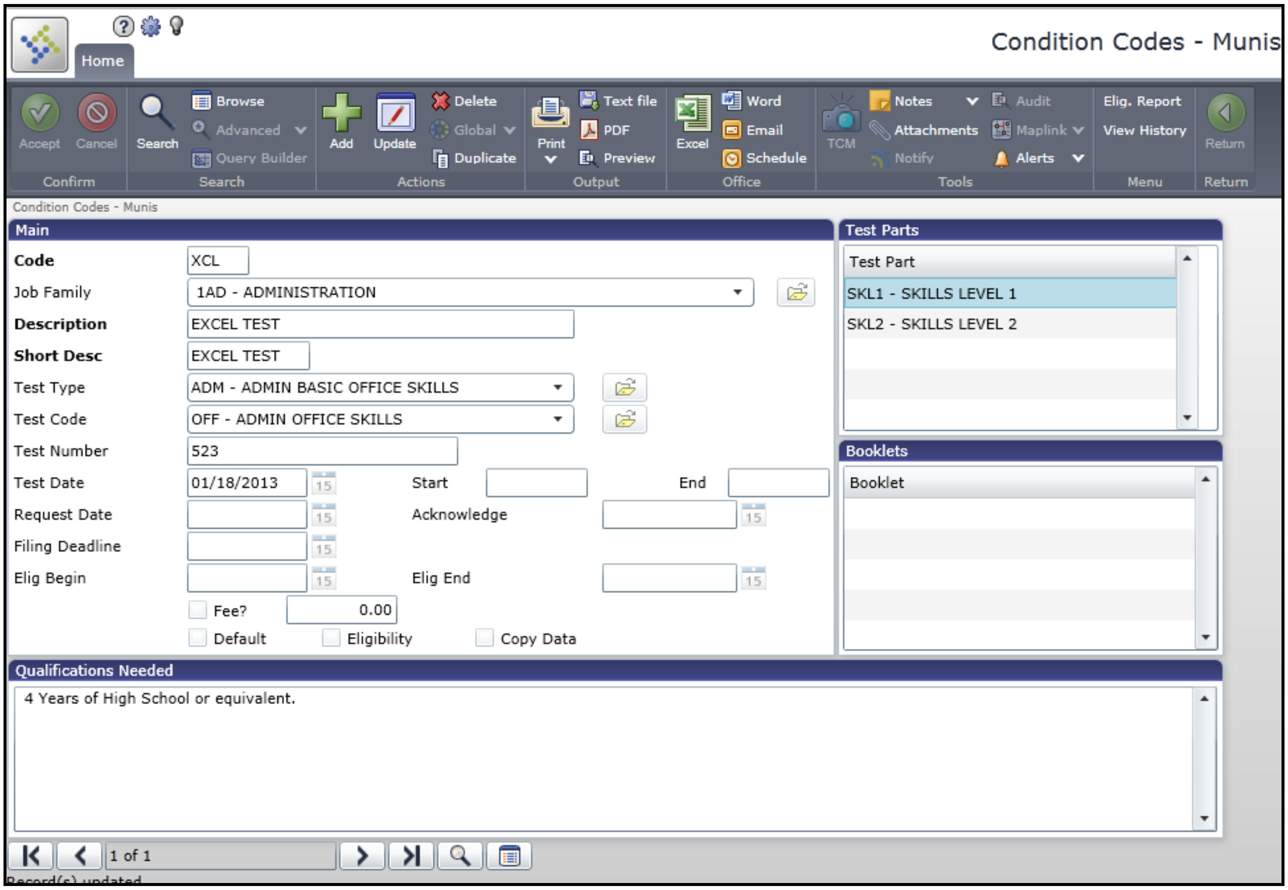
When employees click the link, ESS displays the survey page.



Test Tracking

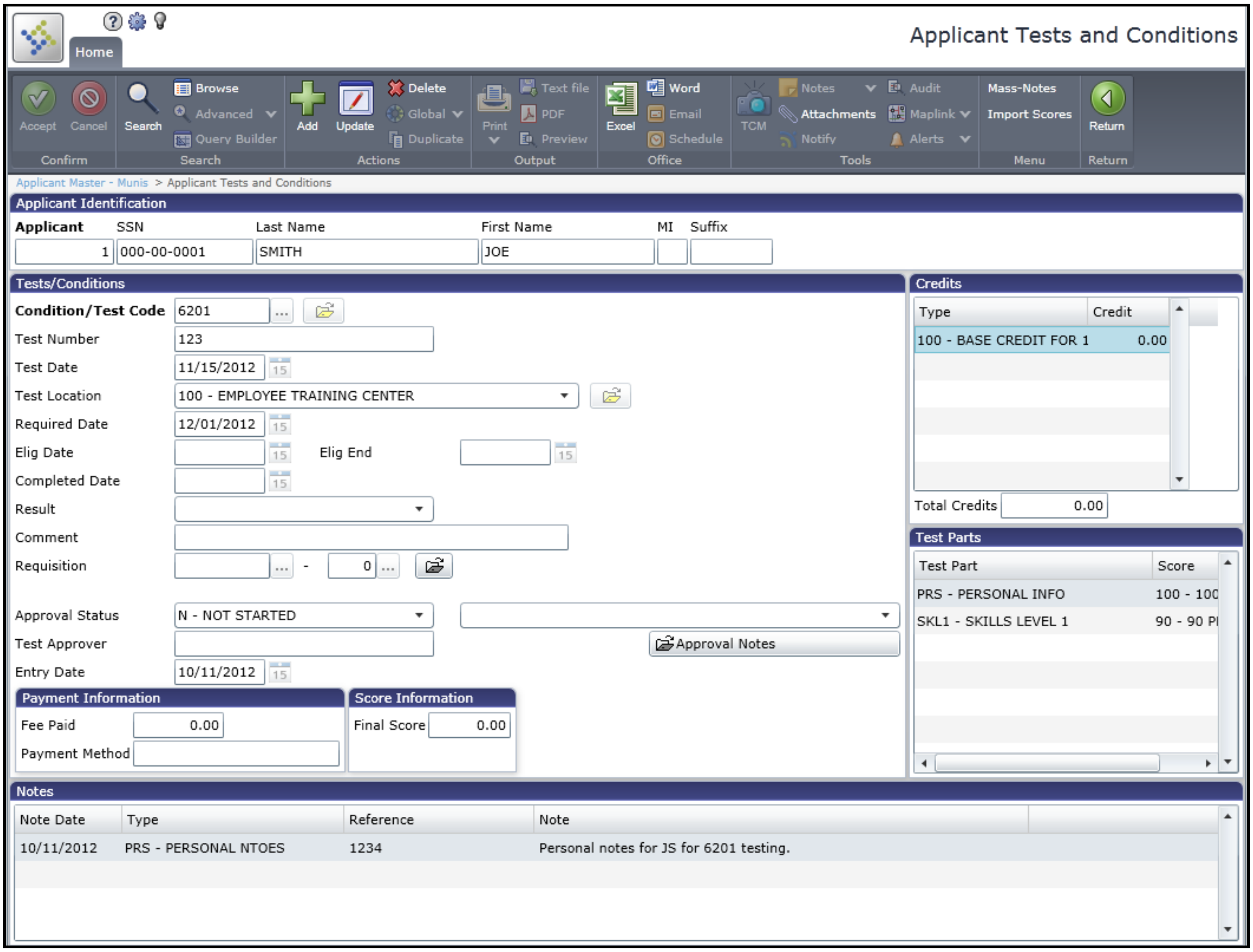
Applicant Processing includes the test-tracking functionality, which records data related to tests taken by applicants.

The Condition Codes program, which maintains condition codes for tracking applicant processing activities, is expanded to accommodate the tracking of individual instances of tests. For example, you can define a specific condition code for an instance of a test, which allows you to define and track unique parameters for that instance, including test number, test date, and included test parts. In addition, you can associate this instance with job openings and track the results of applicants who complete it.



The Test Type list indicates the type of test required for the job opening. The Test Code and Test Number fields further identify the test. The Test Date fields identify when the testing occurs, and the remaining fields identify test specifics.

Once the applicant has taken the test, you can view and update the test data on the applicant record, which is available on the Application Tests and Conditions screen in the Applicant Master program.

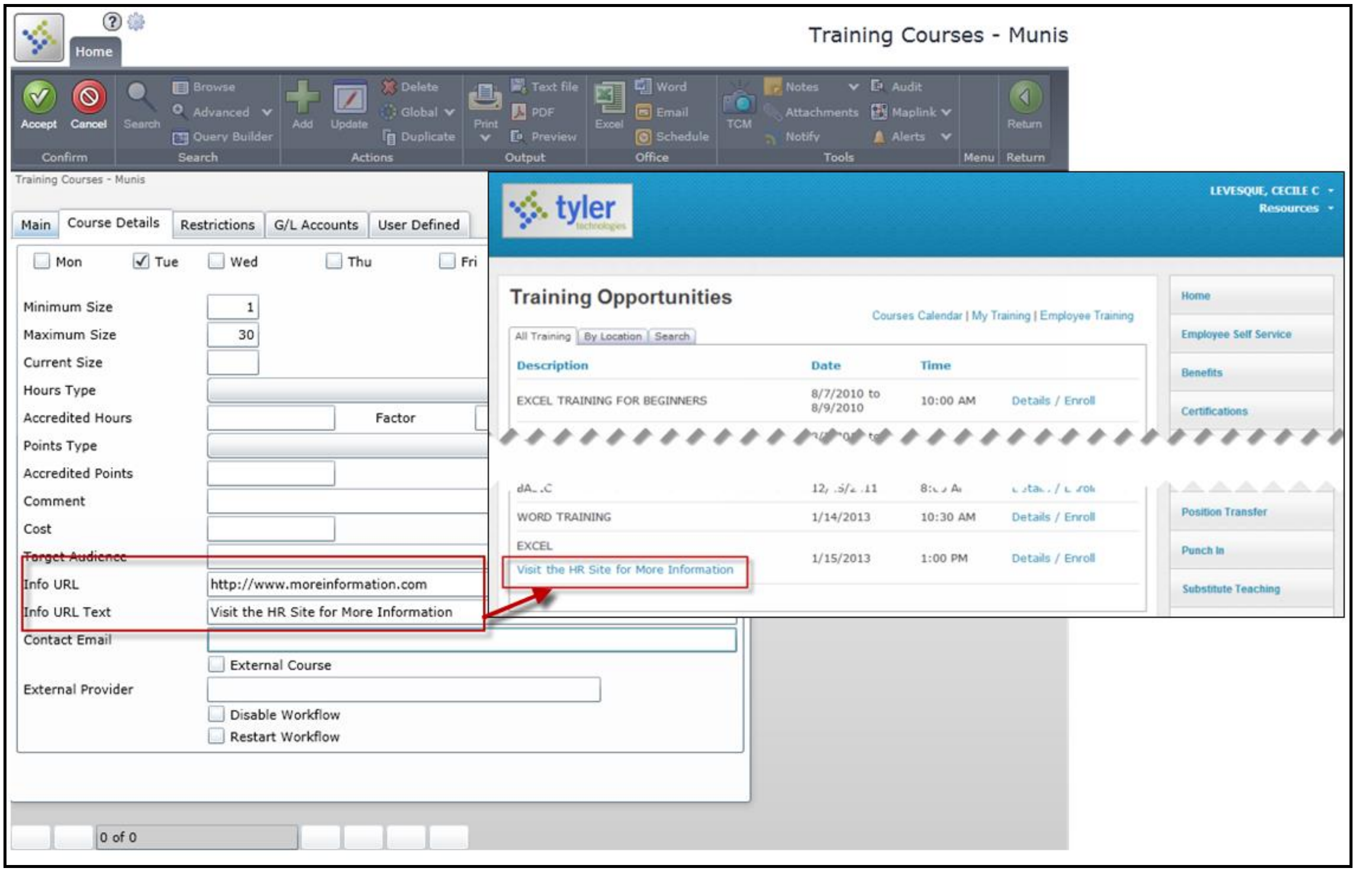


All related Applicant Processing programs, reports, and processes are updated to accommodate the test-tracking functionality.

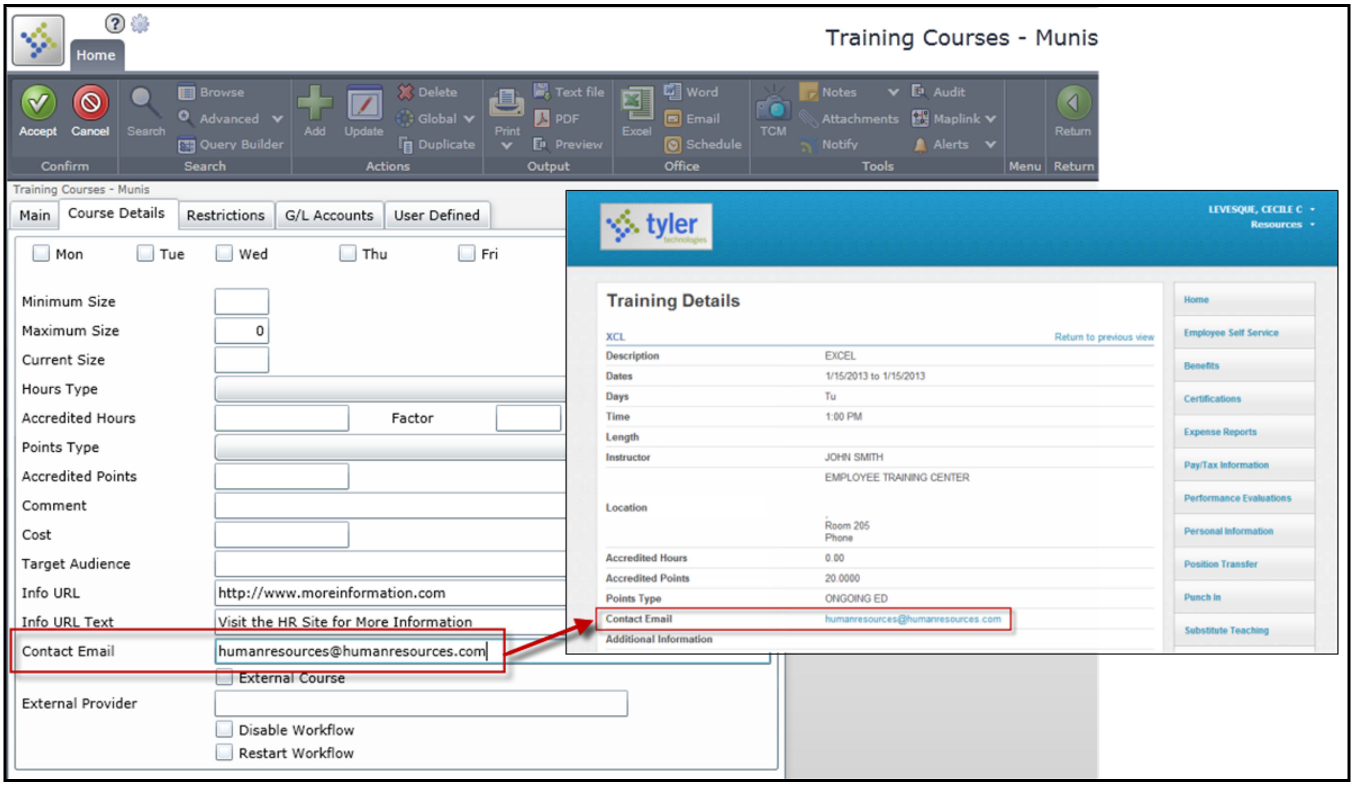
Employee Self Service

The Course Details tab of the Training Courses program includes the Info URL, Info URL Text, and Contact Email fields.

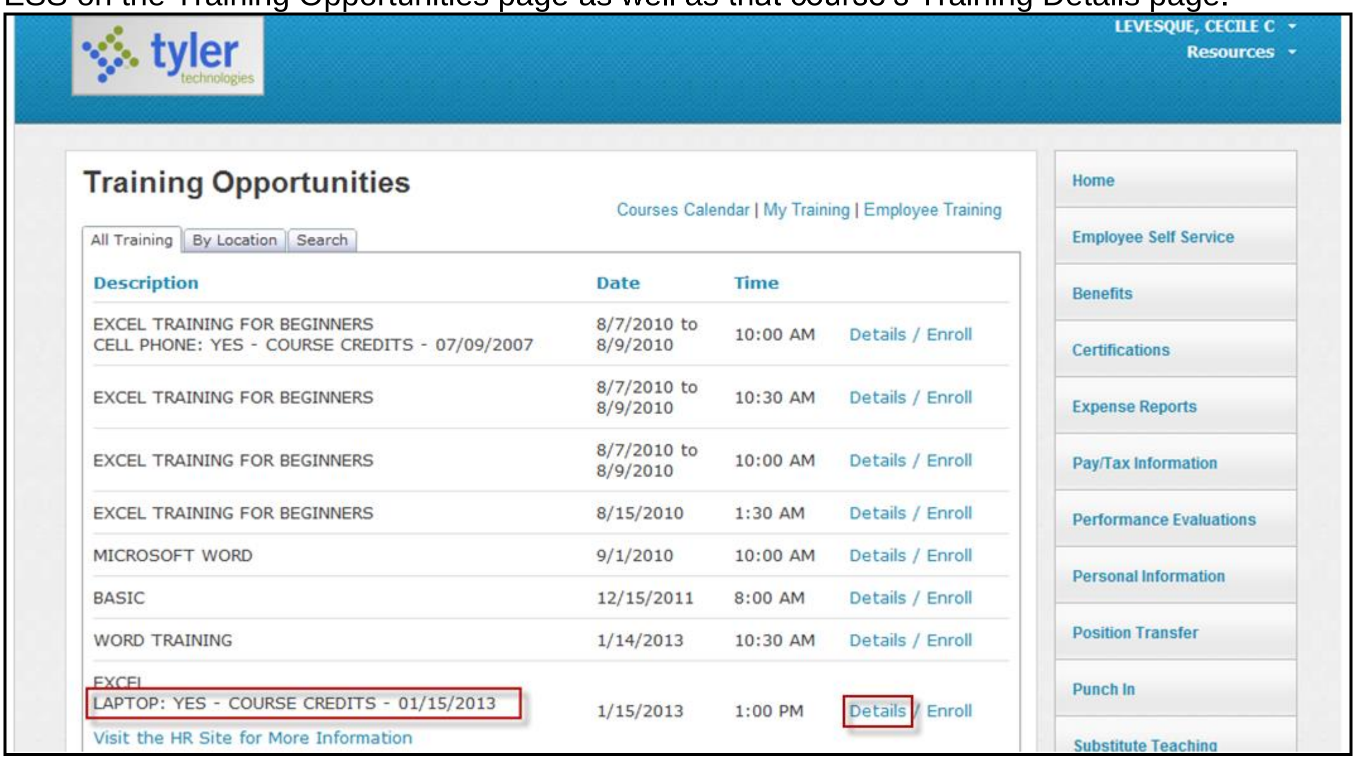
The Info URL box indicates the web address of a link that displays on an employee's self service Training Opportunities page and in the course's Training Details page. The Info URL Text box defines the text of the link.



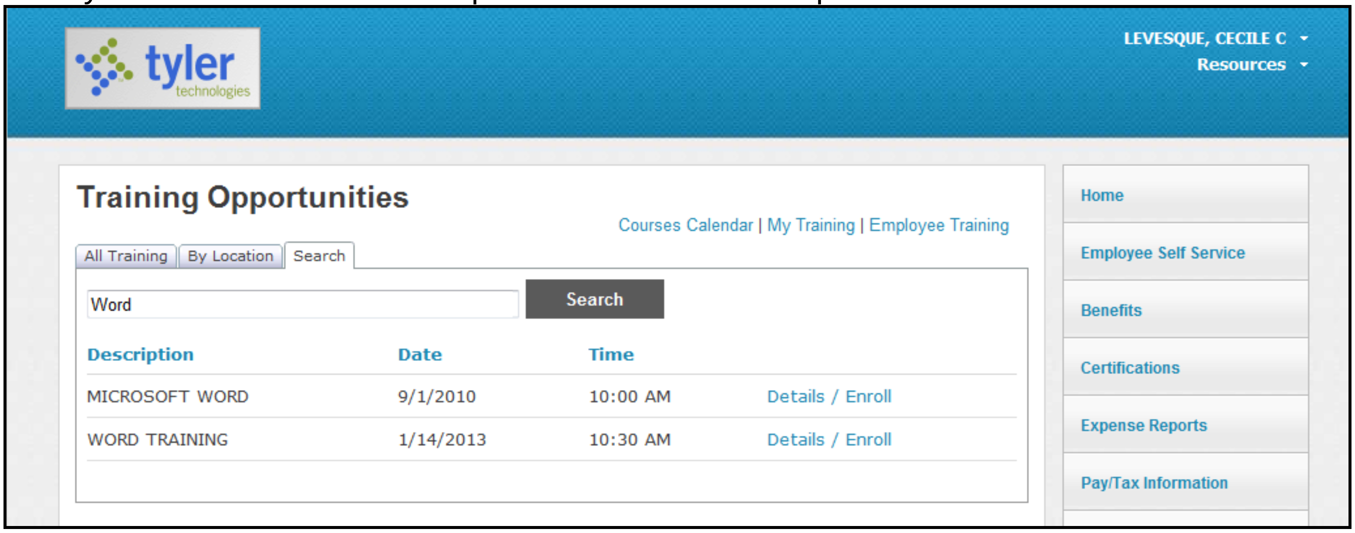
The Contact Email box defines the email address of a contact who can provide more information regarding the course. This email address displays on the course's training details page.



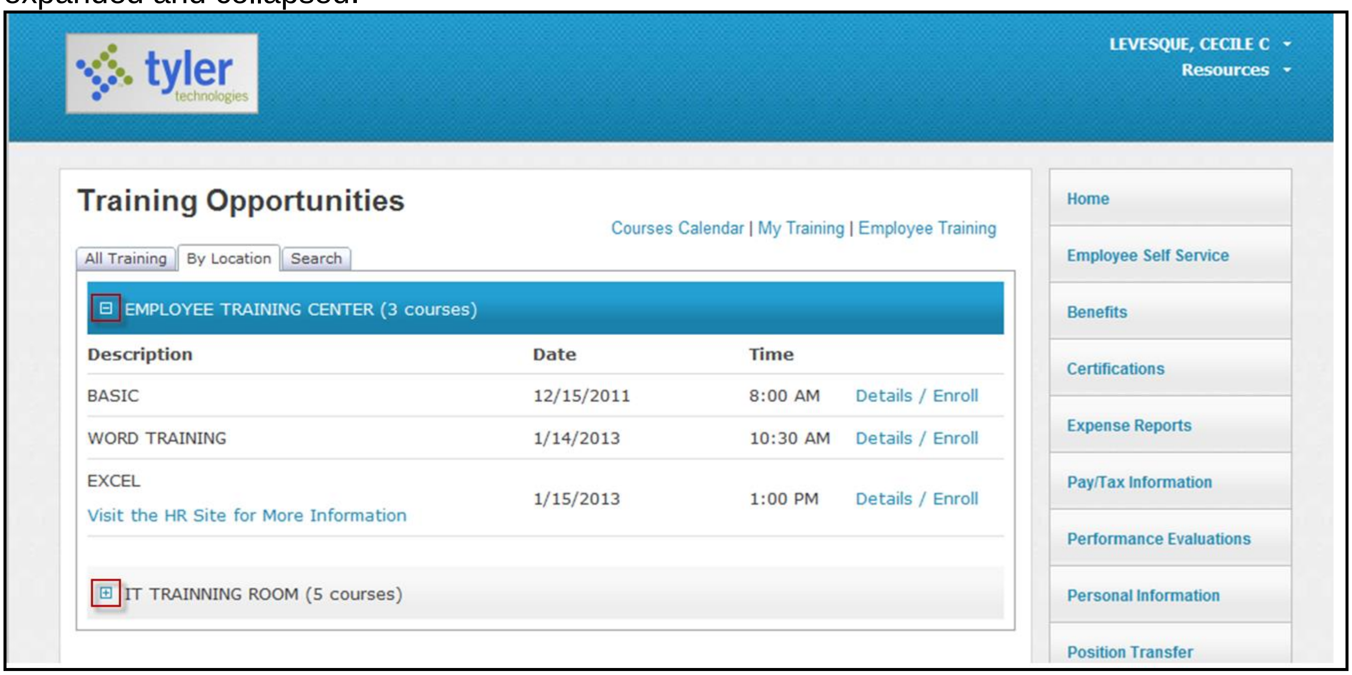
User-defined fields specified for any course in the Munis Training Courses program display in ESS on the Training Opportunities page as well as that course's Training Details page.



The Search tab on the Training Opportunities page enables you to find courses by searching for keywords in the course description and location description.



The By Location tab groups the available training course by location headings, which can be expanded and collapsed.



Payroll

The following changes apply to Munis Payroll programs.

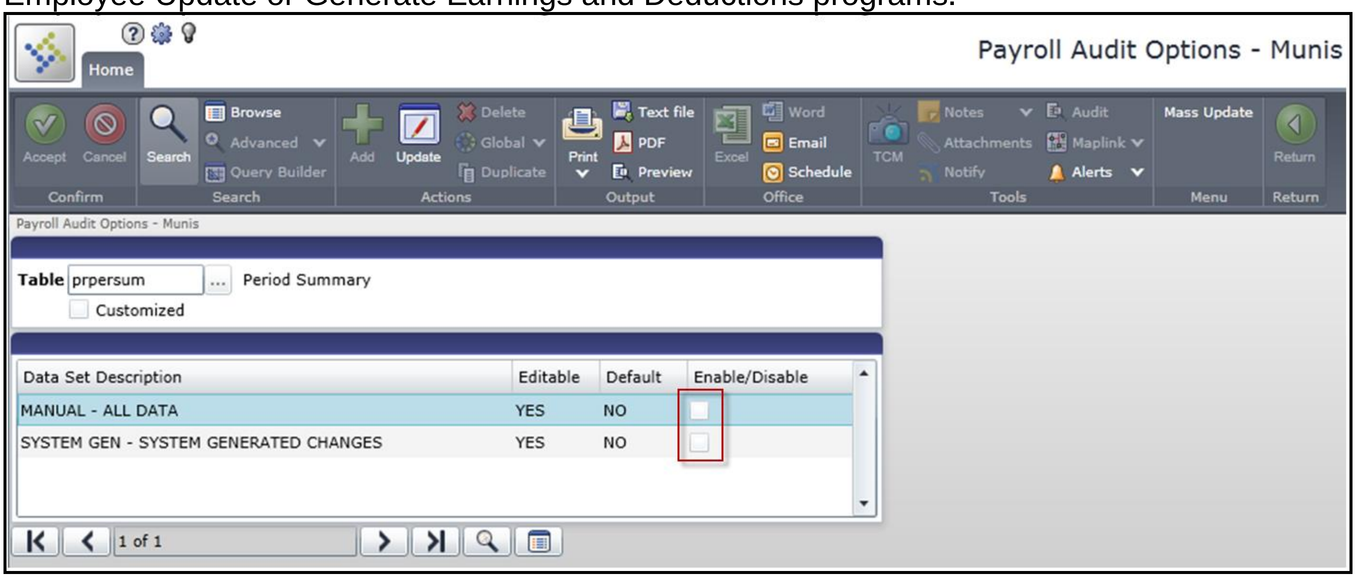
Audits

The system audits the old and new values of a field that is added, updated, or deleted. As a result, fields are properly audited when new records are added to a database, each record is reportable from outside of the Audit Inquiry program, and changes can be selectively excluded from auditing without breaking the audit trail. Both old and new values are stored on a single record.

Since auditing occurs on the database, this decreases the number of communications between two servers in split-server environments and improves the efficiency of the audit process.

During the audit process, more information is written to each audit record, including the name of the program from which the change was made. This allows you to determine how the change was made, when the change was made, and by whom it was made.

Though the audit tables are smaller in size, writing more data creates a greater number of audit records. To enable a more refined selection of changes to audit, in the Payroll Audit Options program, the All audit option has been replaced by the Manual and System Gen audit options for tables affected by programs that process changes at a mass scale, such as the Employee Update or Generate Earnings and Deductions programs.



The Manual option toggles auditing for all changes made by users. The System Gen option toggles auditing for system-generated changes made by specific programs. For instance, leave the System Gen option disabled for the Accumulators table to set the Employee Update program not to make audits to the table each time it is run, which greatly reduces the number of audits.

This functionality is available for the following tables. Each table is accompanied by the programs for which auditing can be toggled off and on with the System Gen option.

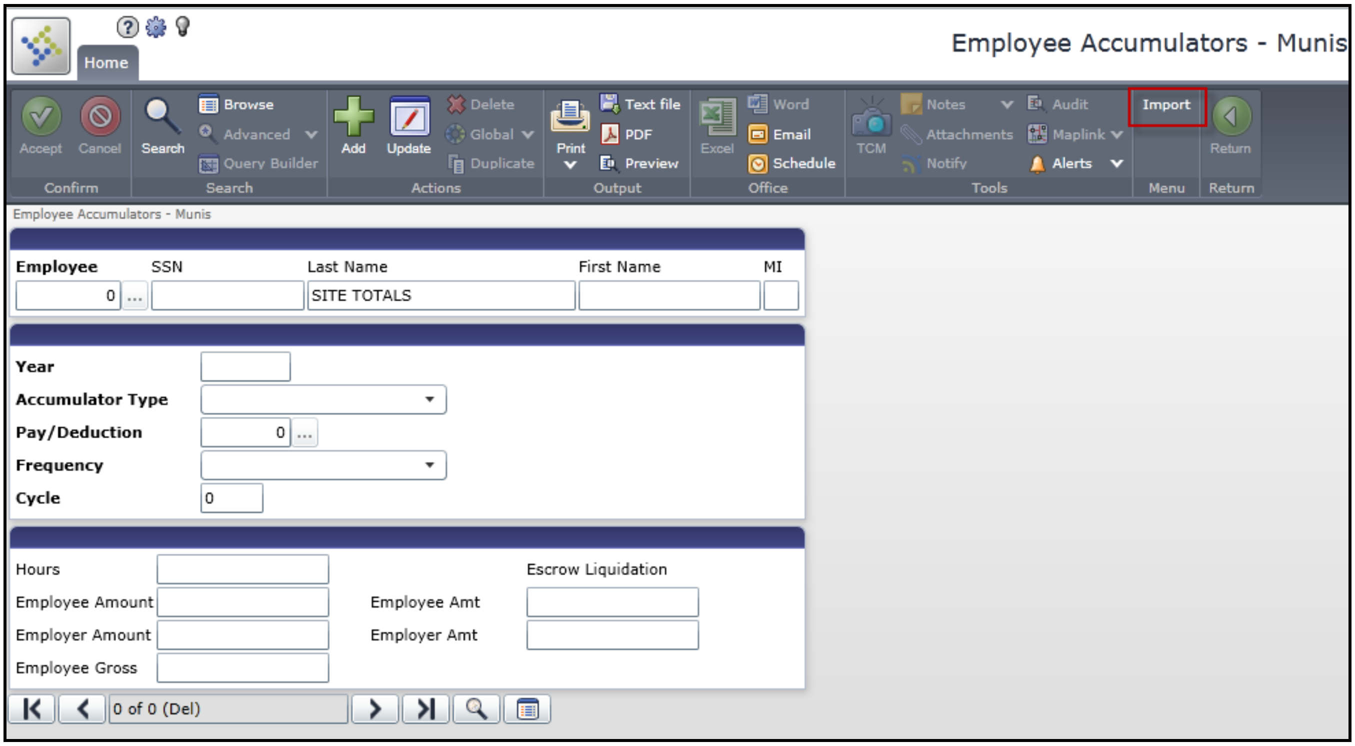
Table	Name	Programs
prpersum	Period Summary	Employee Update, Generate Earnings and Deductions
prpmppay	Period Pays	Employee Update, Generate Earnings and Deductions
prpmdded	Period Deductions	Employee Update, Generate Earnings and Deductions
prglallc	Period Pay Manual GL Allocations	Employee Update, Generate Earnings and Deductions
prperach	Period Accrual History	Employee Update, Generate Earnings and Deductions
prperacc	Period Accruals	Employee Update, Generate Earnings and Deductions
pryeeapp	Year End Accrued Expense Pays	Employee Update
pryeeapd	Year End Accrued Expense Deductions	Employee Update
prdedhis	Deduction History	Employee Update
prearnhi	Earnings History	Employee Update
prempacm	Employee Accumulators	Employee Update
prpersum	Period Summary	Employee Update, Generate Earnings and Deductions

When the Manual option is enabled and the System Gen option is disabled, the system audits only changes made outside of the defined programs, whether those changes are made by other Munis programs or directly to the database. This results in a significant decrease in audit data size and communication with the database while preserving an otherwise comprehensive audit trail. In addition, payroll processing time is equal to when auditing is turned off.

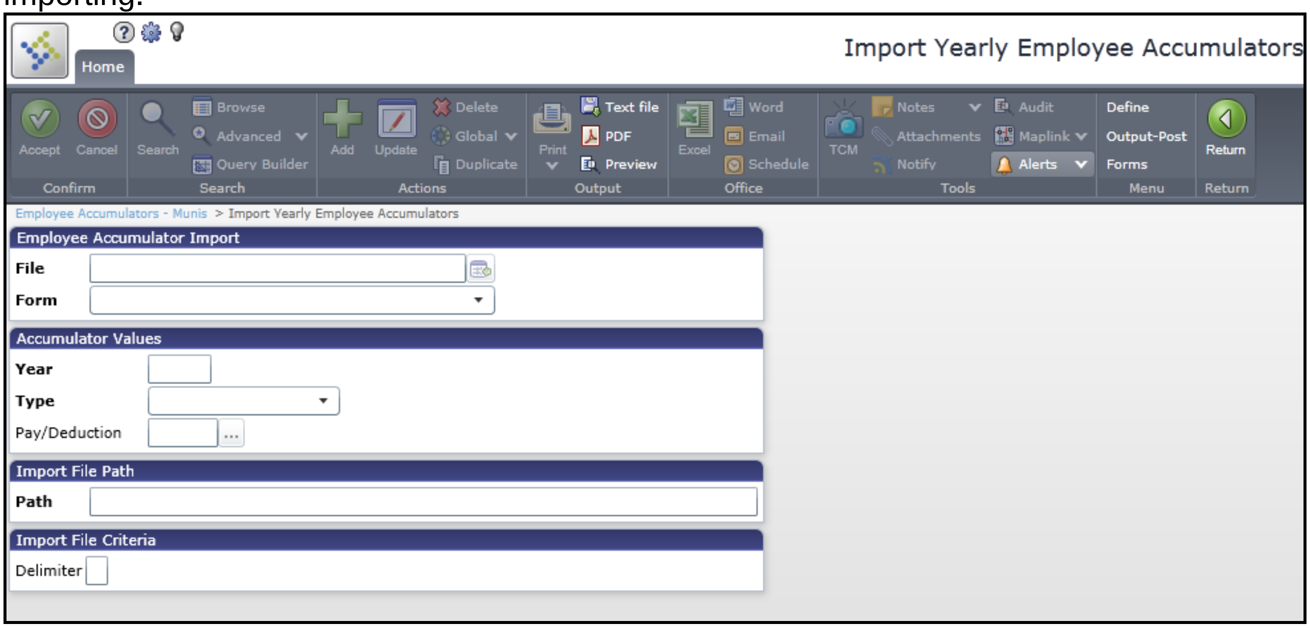
Both options are disabled by default for new customers; selections made by existing customers on the relevant tables are migrated.

Employee Accumulators

The Import option in the Employee Accumulators program imports yearly amounts for employee deductions or pays.



Click Import to display the Import Yearly Employee Accumulators screen, where you can define the parameters for your import, including the file to import, the form definition to use when processing the import file, and the year and type of the accumulator records you are importing.



The import function imports only yearly records. Unless you are re-importing values for existing yearly records, the function does not update any existing deduction or pay amounts.

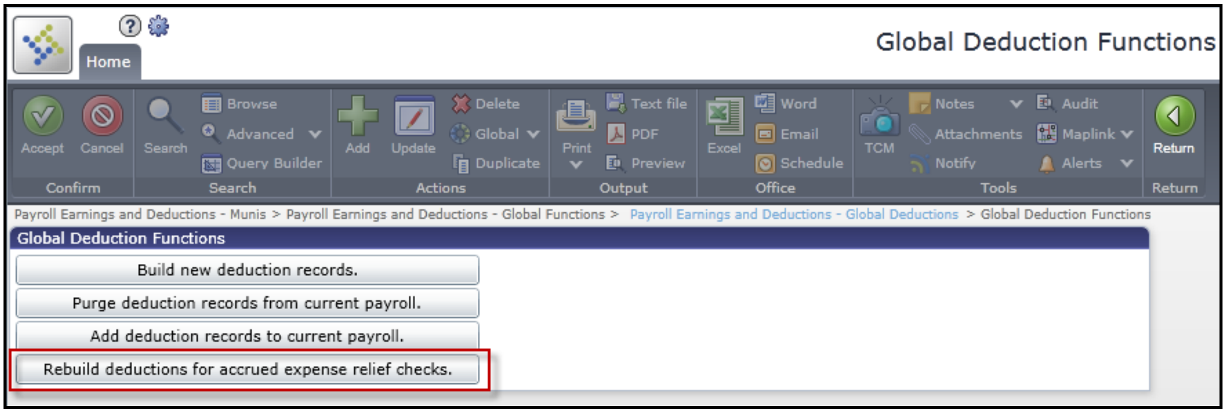
Payroll Control Settings

Category	Setting	Description
General	ESS User Name Format and Sync Mode	This option, when enabled, directs the system to synchronize changes made to an employee's name in Employee Master to that employee's name in ESS. You can select a number of name formats for the synchronization, including first name and last name; first name only; or last name, middle initial, first name.
Generate	Prorate Pay Hours	This option, if enabled, sets calc codes CC11, CC32, CC33, and CC70 to prorate hours by dividing the pay amount by the pay rate.
Generate	Include Escrow Balance on Final Pay	This option, when enabled, sets pay type 5 to determine its final escrow pay amount by adding the remaining escrow balance to the pay amount.
GL Posting	Default Cash Account Project Code	This option, if enabled, allows you to define a project code for the cash account in addition to the general project code.
Time Entry	Use Hours/Days on Teacher Salary Record for Sub	This option, when enabled, sets a substitute teacher's pay rate in Time Entry to that of the teacher for whom they are substituting.
Time Entry	Calculate FLSA By Gen Level Dates	This option, when enabled, allows you to use generate level dates when processing FLSA periods within the Time Entry move process.

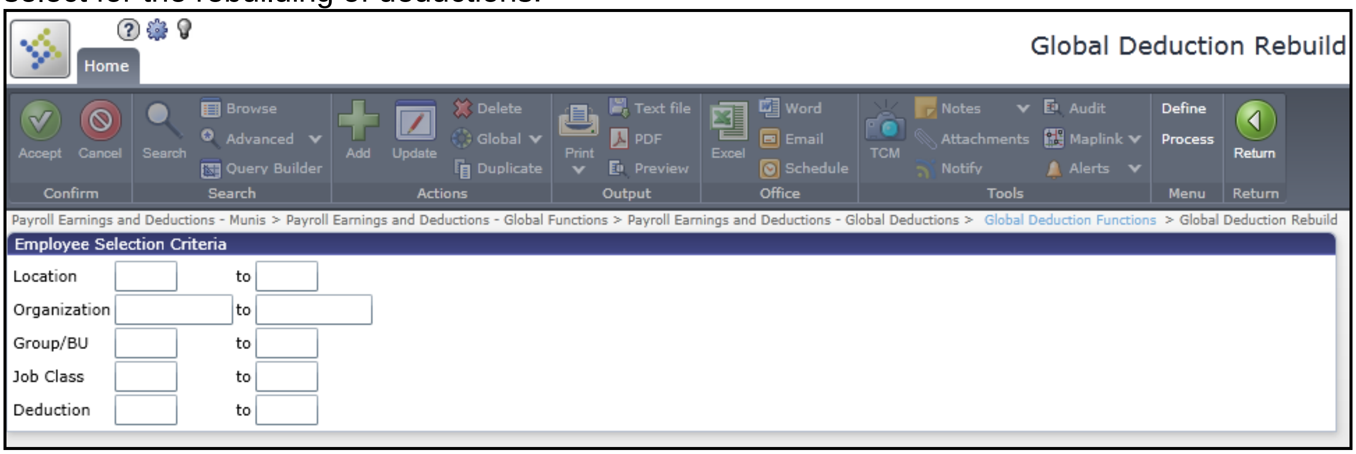
Payroll Earnings and Deductions

The Rebuild Deductions for Accrued Expense Relief Checks option enables you to make changes to deductions on accrued expense relief checks.

To navigate to this option in Payroll Earnings and Deductions, click Global to display the Global Functions screen and then select the Global Access to Deduction Records option to display the Global Deductions screen. On this screen, click Global to display the Global Deduction Functions screen.

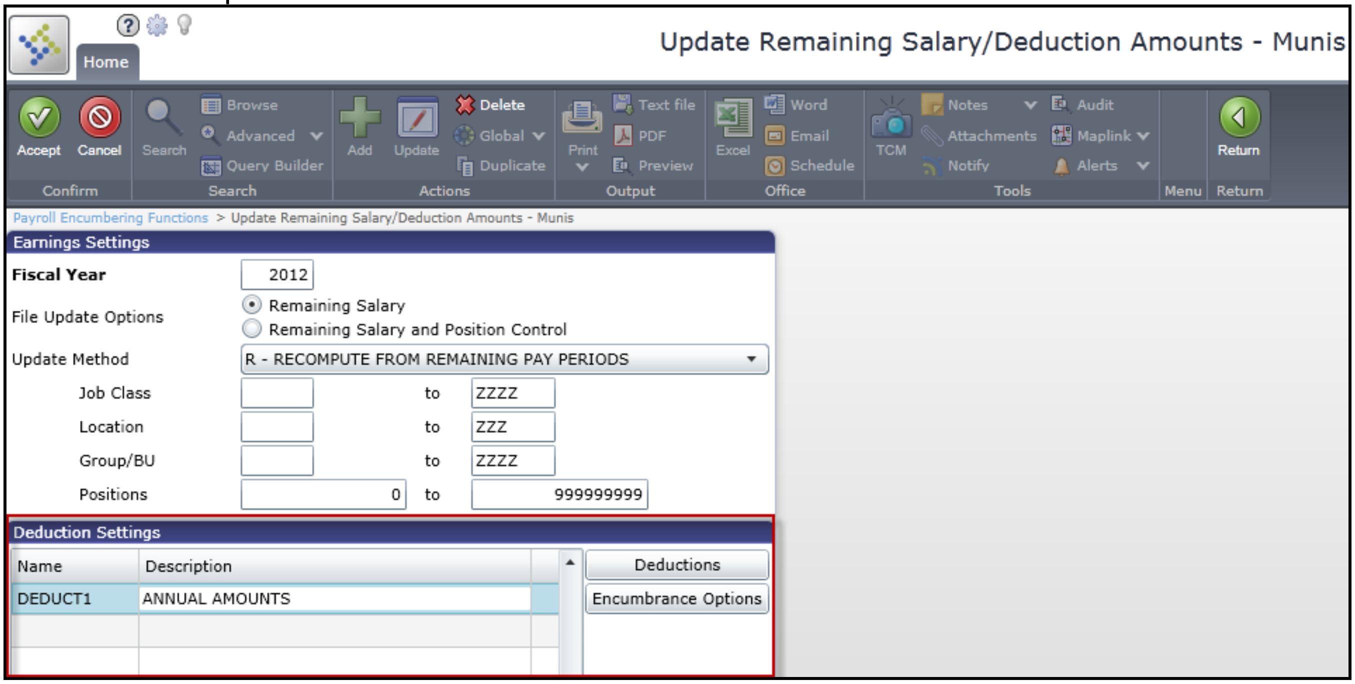


Click the Rebuild Deductions for Accrued Expense Relief Checks option and the program displays the Global Deduction Rebuild screen. Use this screen to define which employees to select for the rebuilding of deductions.



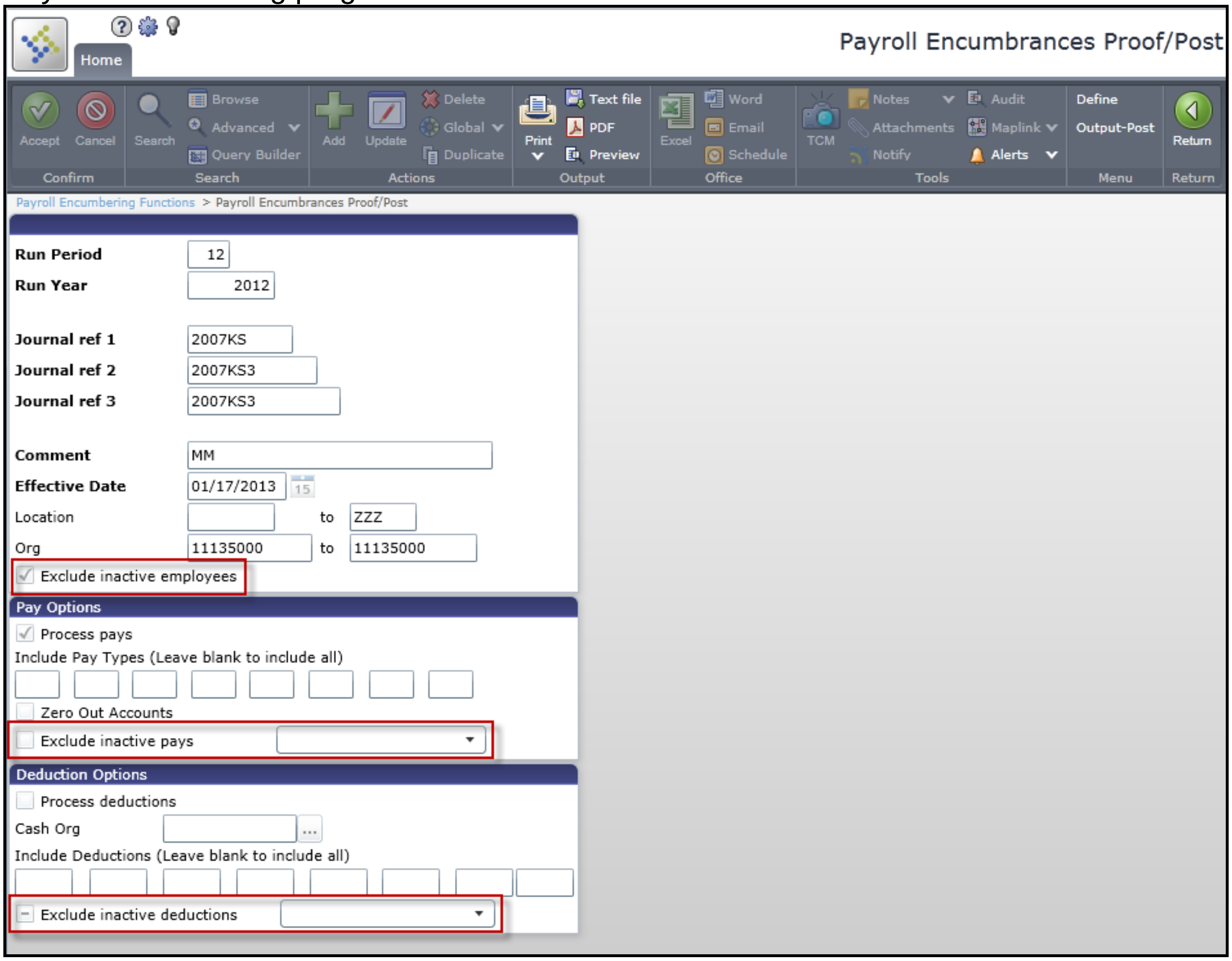
Payroll Encumbering

The Deduction Settings group on the Update Remaining Salary/Deduction Amounts screen in the Payroll Encumbering program allows you to create sets of deductions and define encumbrance options for those sets.



These deduction sets and their accompanying encumbrance options are included when you process the update.

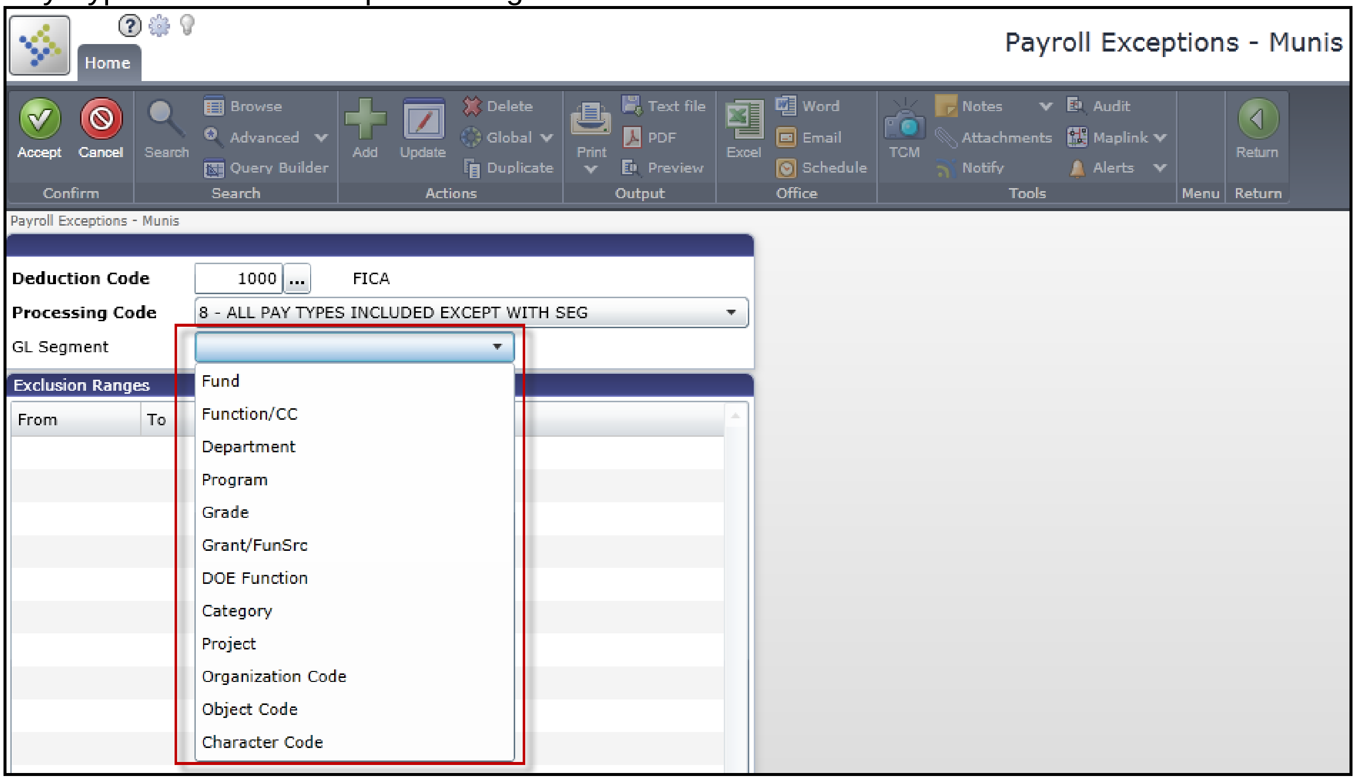
New exclusion options are included in the Payroll Encumbrances Proof/Post screen in the Payroll Encumbering program.



- The Exclude Inactive Employees check box excludes inactive employees from the encumbrance posting.
- The Exclude Inactive Pays check box excludes inactive pays from the encumbrance posting. If you select this check box, you must select an option from the accompanying list to define which inactive pays to exclude. The following options are available:
    - Inactive By Date
    - Inactive By Status
    - Inactive By Both
- The Exclude Inactive Deductions check box excludes inactive deductions from the encumbrance posting. If you select this check box, you must select an option from the accompanying list to define which inactive deductions to exclude. The following options are available:
    - Inactive By Date
    - Inactive By Status
    - Inactive By Both

Payroll Exceptions

The GL Segment list is available when you add a payroll exclusion with processing code 8 - All Pay Types Included Except with Seg.



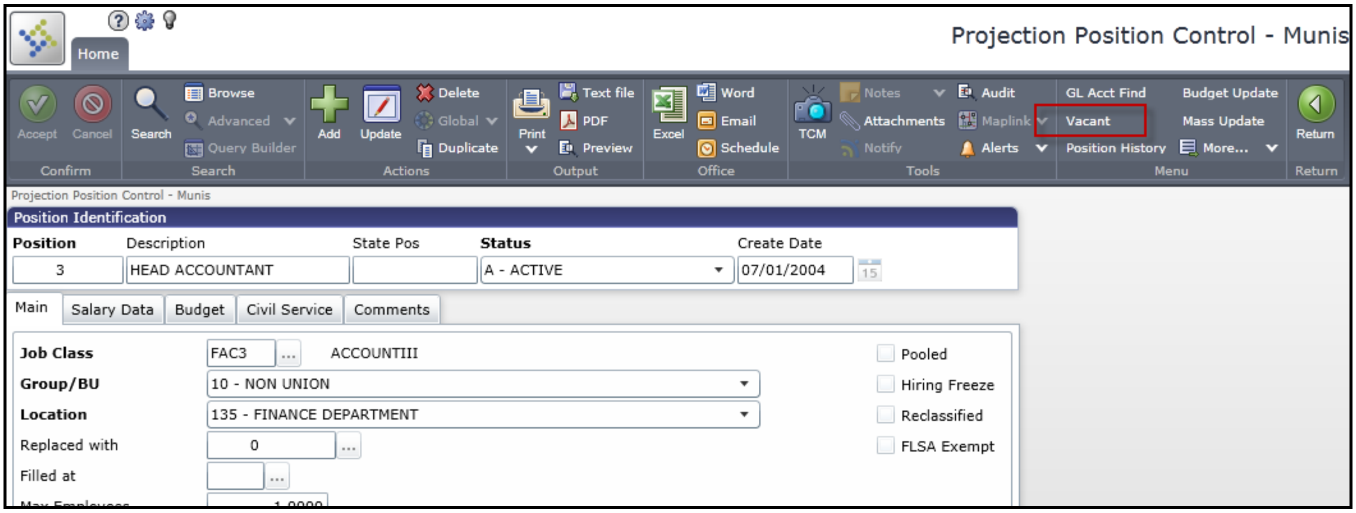
Select a GL Segment type from this list and then use the Exclusion Ranges fields to define the codes to exclude. For instance, if you select the Object Code option from the GL Segment list, then define ranges of Object Codes in the Exclusion Ranges fields.

Salary and Benefit Projections

The following changes apply to Munis Salary and Benefit Projections programs.

Projection Position Control

The Vacant process in Projections Position Control generates a proof report.



This report indicates the number of employees created as part of the process and the positions for which they are created.

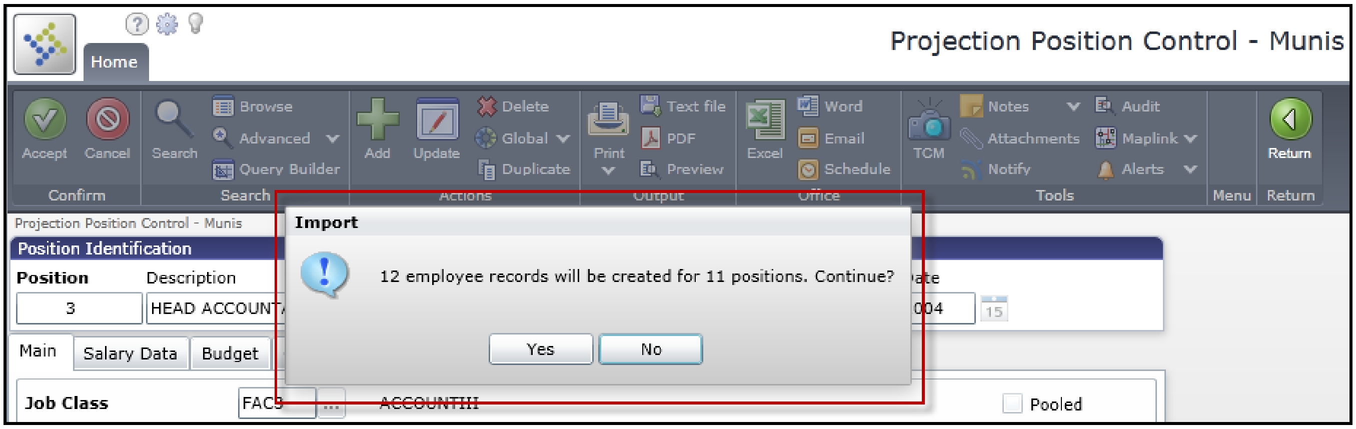
01/07/2013 15:18
sean.higgins

MUNIS
Employee Position

PG 1
pmposctl

	EMPLOYEE NUMBER	EMPLOYEE NAME	JOB CLASS	LOCATION
POSITION:0003				
	000217	VACANT000217, POSITION	FAC3 - ACCOUNTANT III	135 - FINANCE DEPARTMENT
POSITION:0010				
	000218	VACANT000217, POSITION	FCL2 - CLERK II	135 - FINANCE DEPARTMENT
POSITION:0011				
	000219	VACANT000217, POSITION	FCL2 - CLERK II	135 - FINANCE DEPARTMENT
POSITION:0012				
	000220	VACANT000217, POSITION	FCL2 - CLERK II	135 - FINANCE DEPARTMENT
POSITION:0013				
	000221	VACANT000217, POSITION	FAC3 - ACCOUNTANT III	135 - FINANCE DEPARTMENT

The program also displays a dialog box that offers you the option of completing or canceling the operation.


Projection Position Control - Munis
Home
Accept
Cancel
Search
Browse
Advanced
Query Builder
Add
Update
Delete
Global
Duplicate
Print
Text file
PDF
Preview
Excel
Word
Email
Schedule
TCM
Notes
Attachments
Notify
Audit
Maplink
Alerts
Return
Confirm
Search
Actions
Output
Office
Tools
Menu
Return
Position Identification
Position
Description
3
HEAD ACCOUNT
Main
Salary Data
Budget
Job Class
FAC5
ACCOUNTIII
Pooled
Import
12 employee records will be created for 11 positions. Continue?
Yes
No

Munis Central Programs

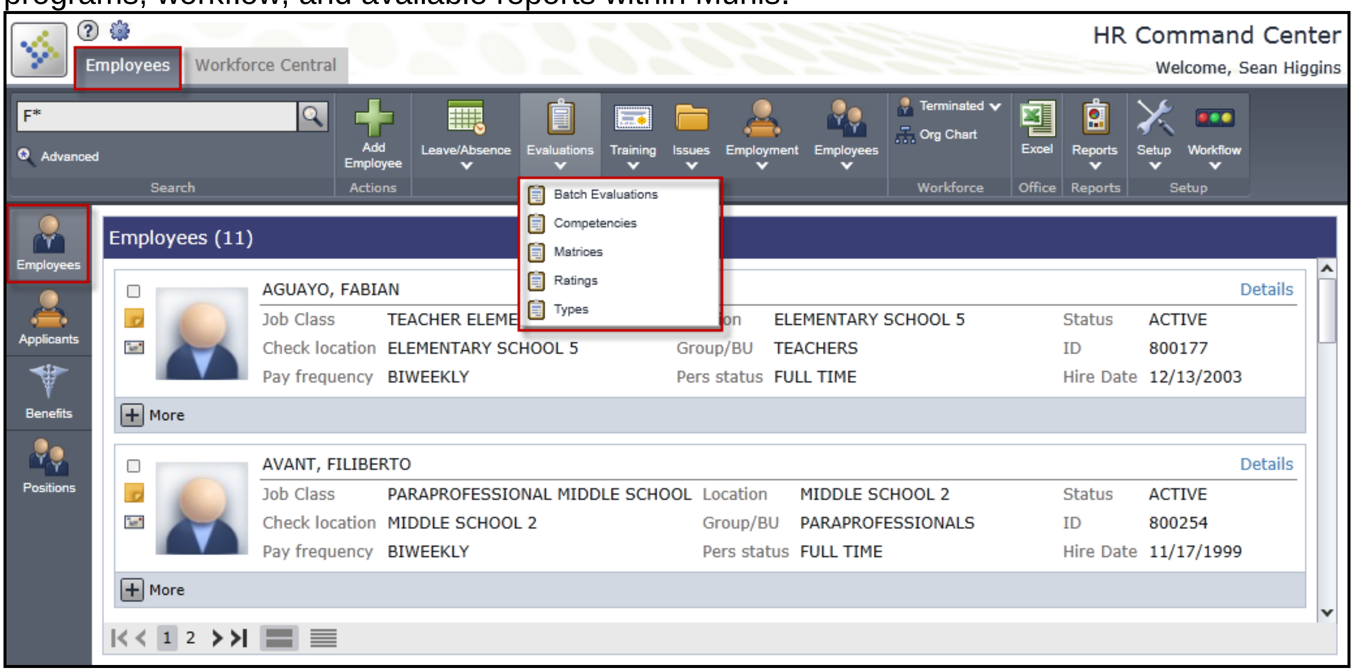
Munis central programs are available from Other Applications menu within Munis. The Centrals menu is organized by product: Financials, HR/Payroll, Revenues, and Administration. The following are HR/Payroll central program enhancements included with Munis Version 10.3.

Important! The Central search programs cap search results at 1000 records. The programs do not provide a message or other indicator when the maximum number of records is reached.

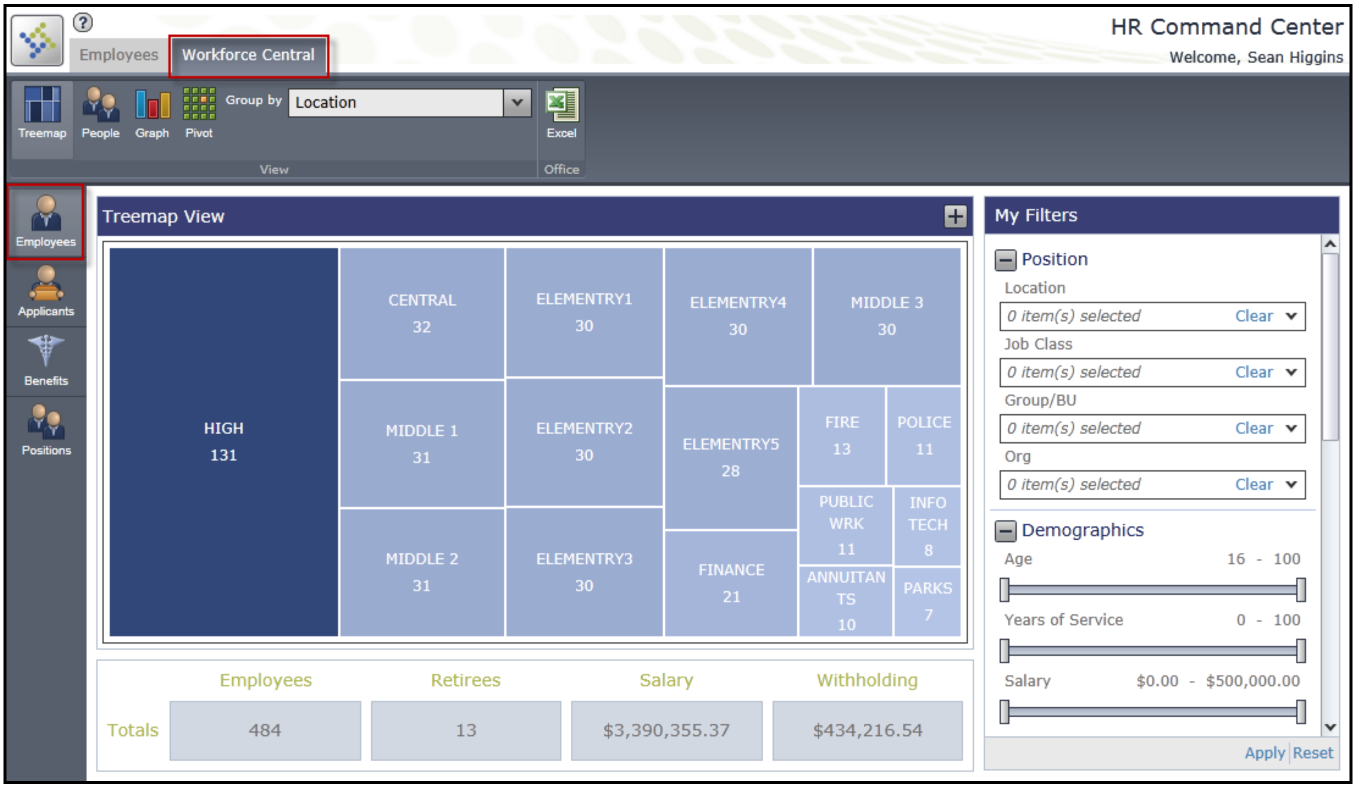
HR Command Center

The Human Resources (HR) Command Center provides a centralized interface for the personnel management central programs. Permissions for the individual programs included in the command center remain as defined for those programs in Munis. The menu options on the left display the Employees, Applicants, Benefits, and Positions panes. For each pane, the ribbon provides options for viewing and maintaining associated data.

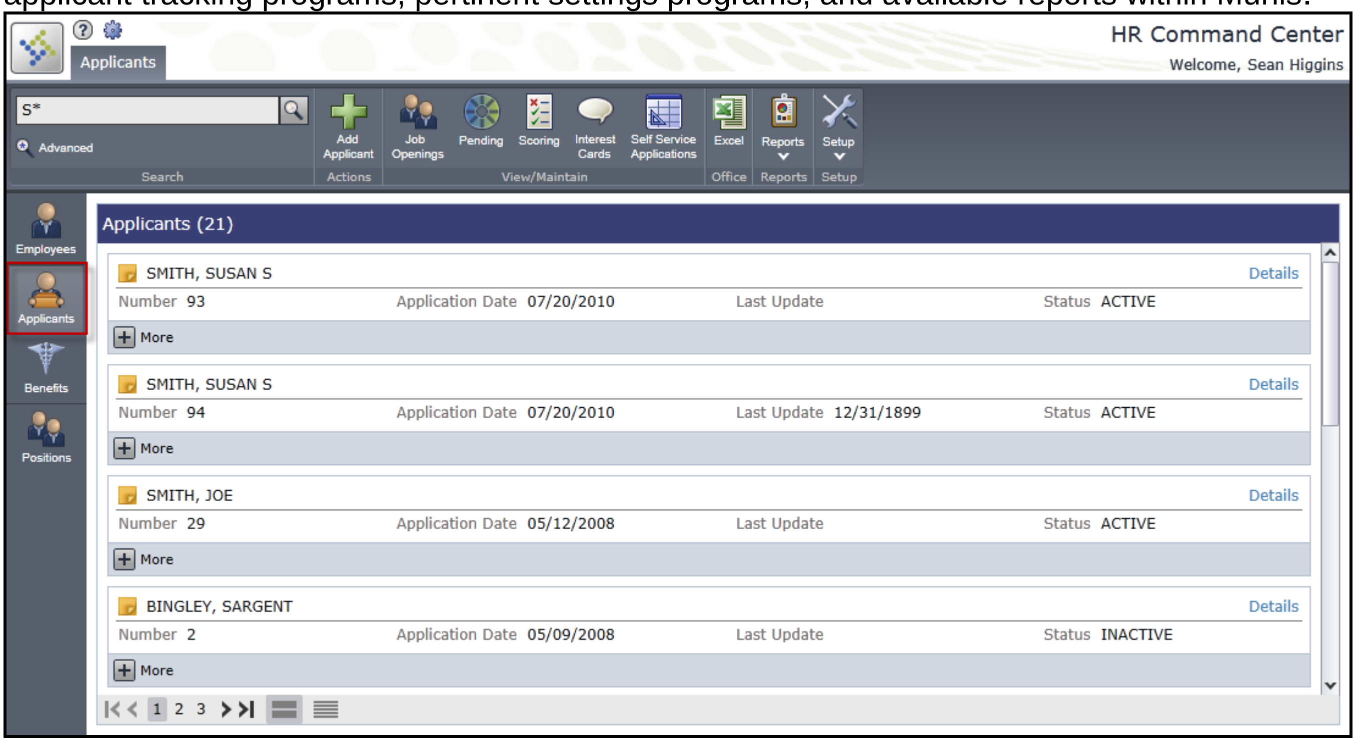
The Employees pane provides general employee data in two views, which can be accessed using the tabs on the ribbon. The Employees view interfaces with the Employee Central program. The options provide direct access to employee programs, pertinent settings programs, workflow, and available reports within Munis.



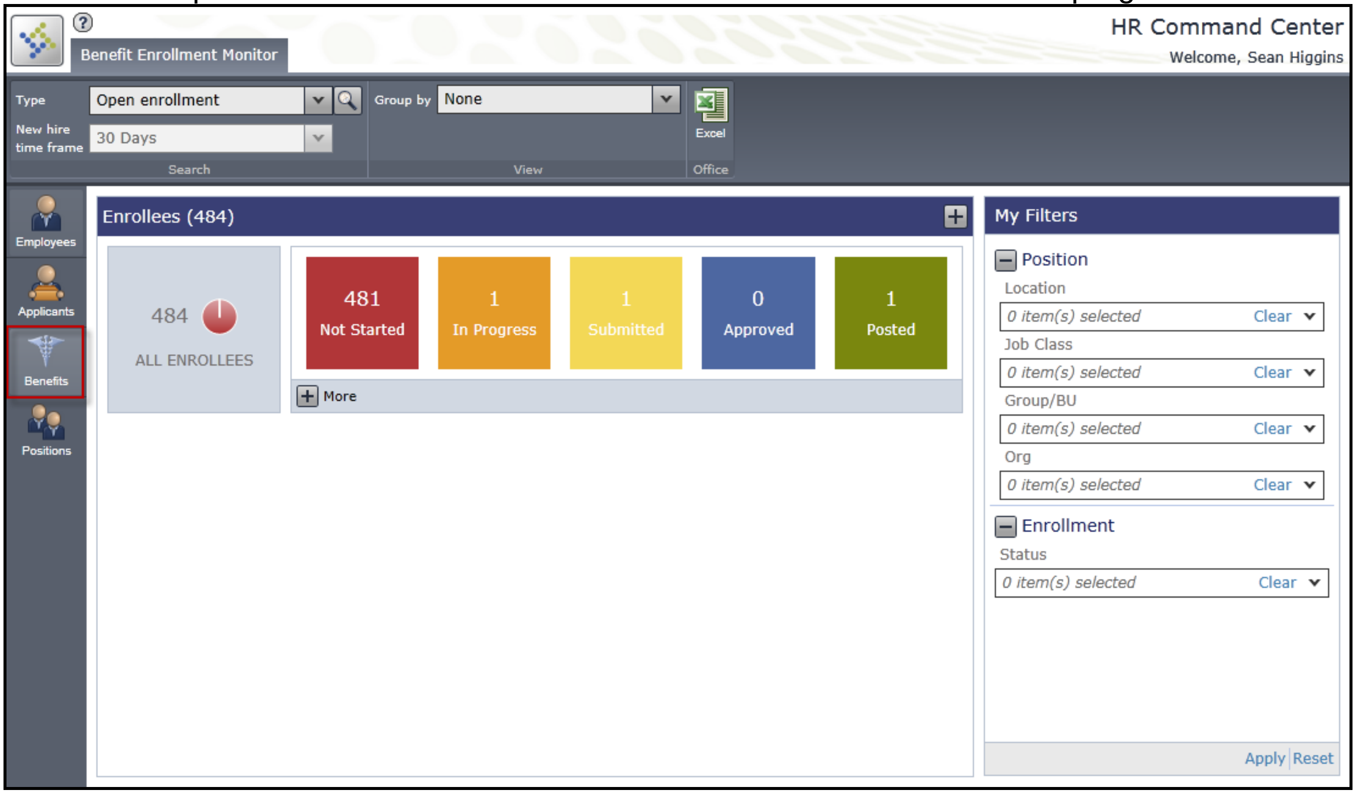
The Workforce Central view is an interface for the Workforce Central program.



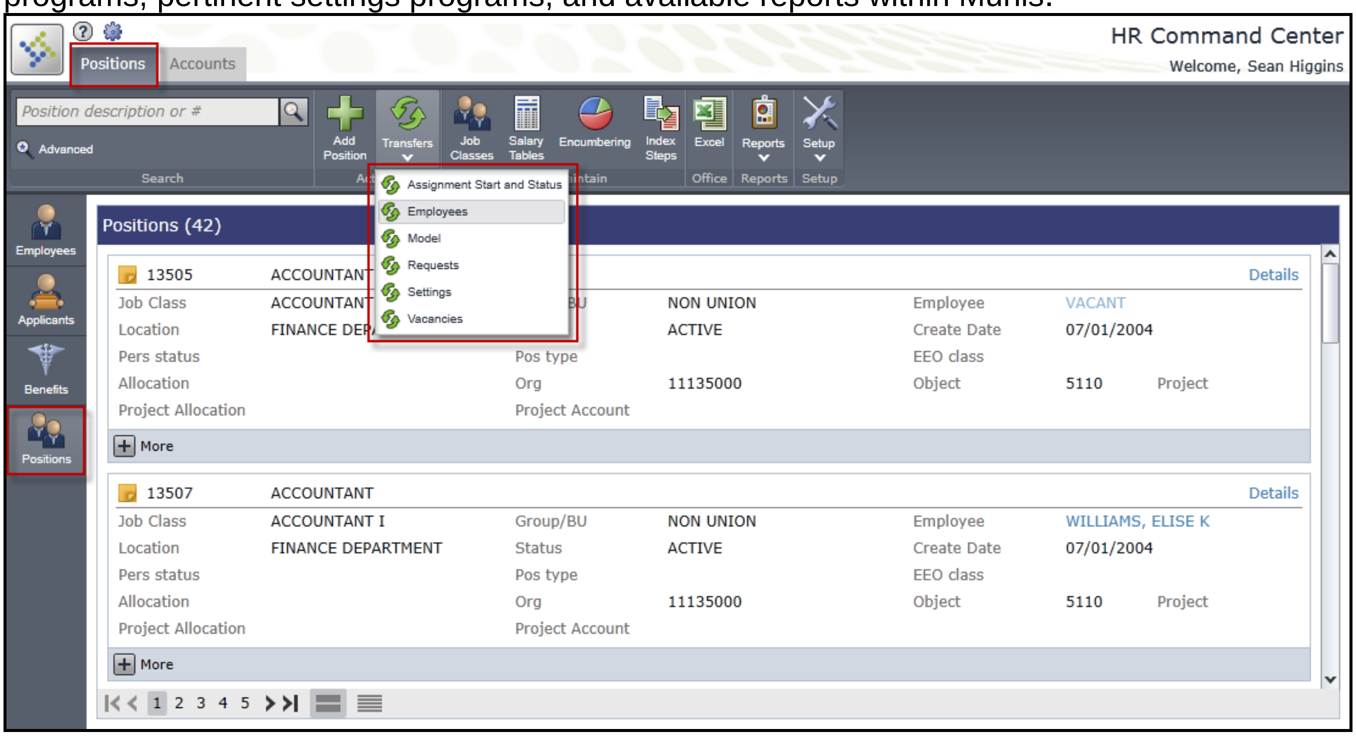
The Applicants pane interfaces with the Applicant Review central program. The options link to applicant tracking programs, pertinent settings programs, and available reports within Munis.



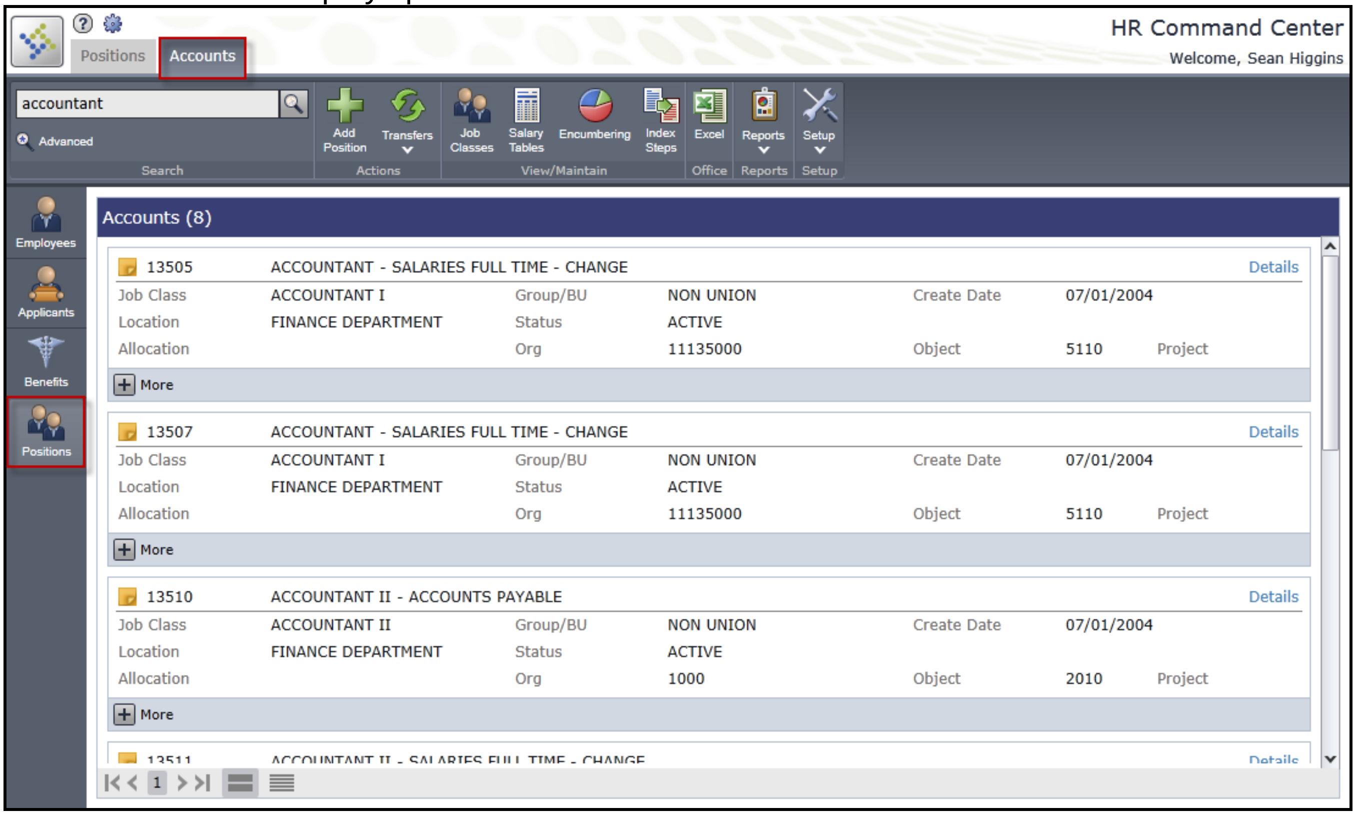
The Benefits pane is an interface for the Benefit Enrollment Monitor central program.



The Positions pane interfaces with the Position Control Central program, which displays in two primary views accessible using the tabs on the ribbon. The Positions view includes position control data organized by position record. The options provide direct access to position control programs, pertinent settings programs, and available reports within Munis.

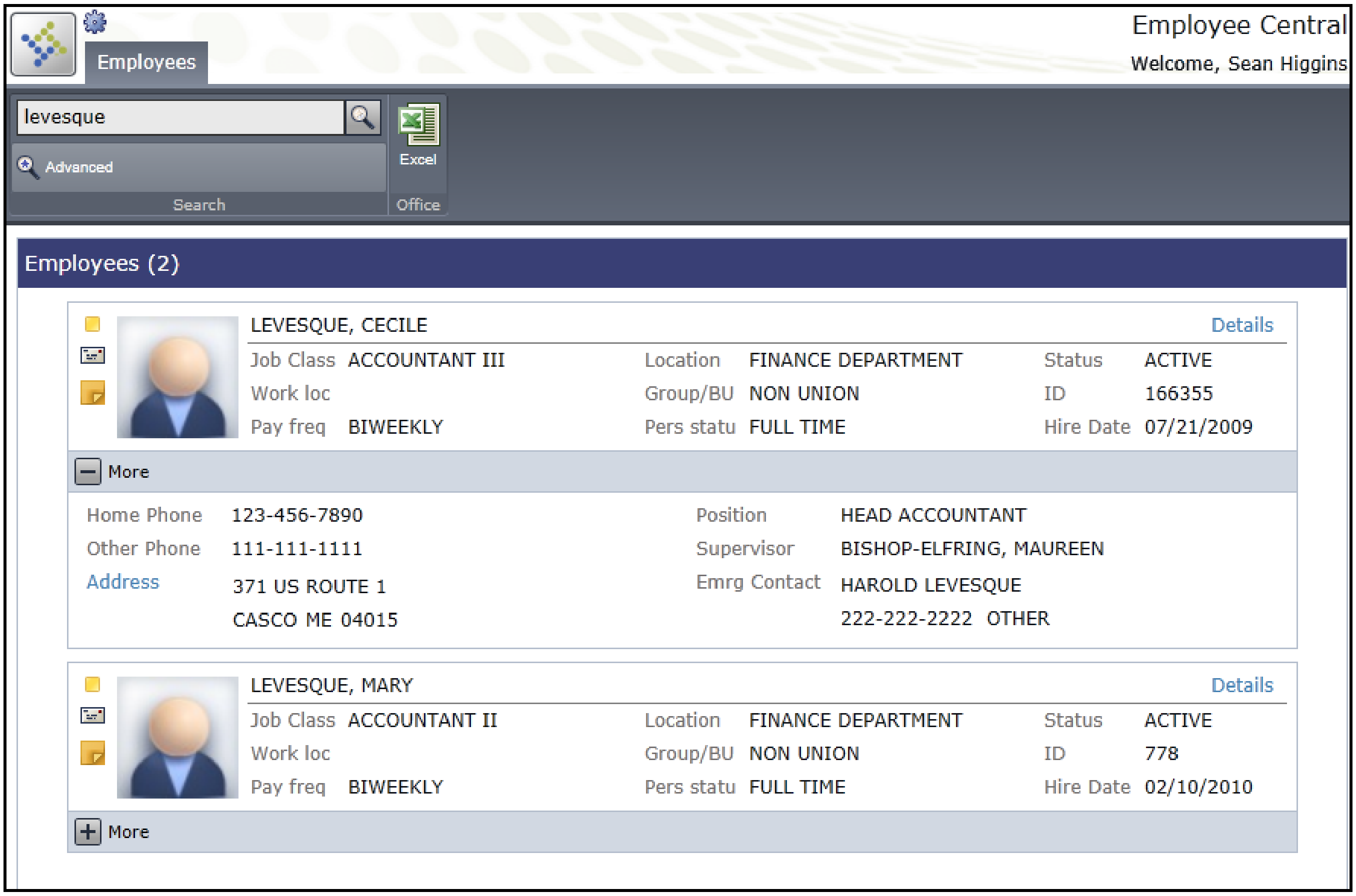


The Accounts view displays position account records.

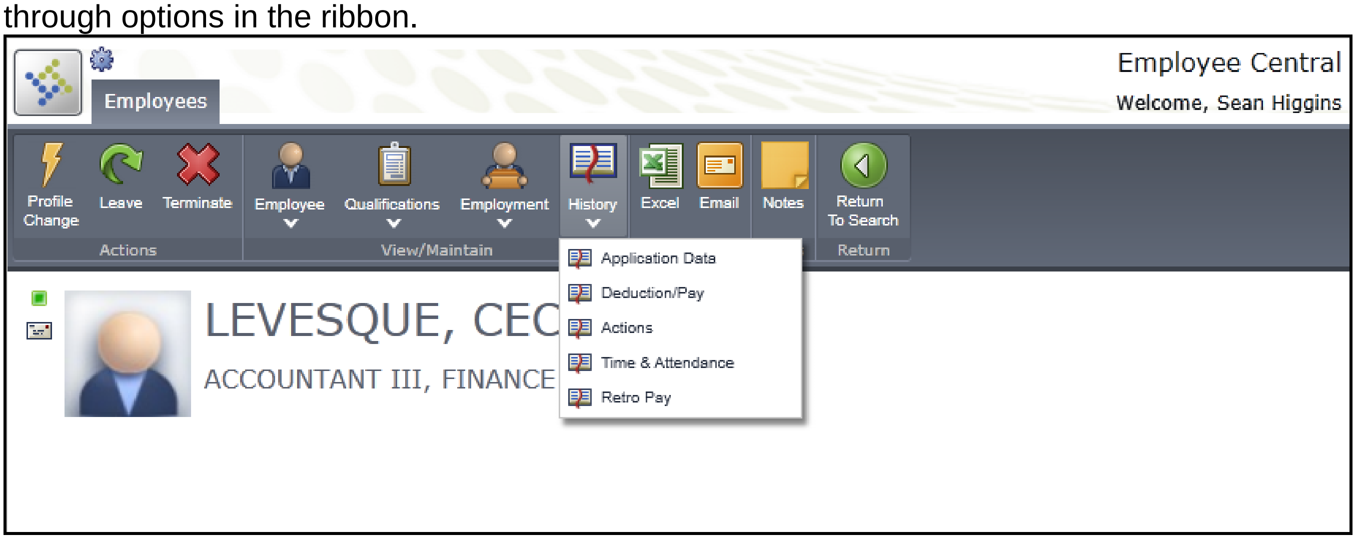


Central Program Design

Central programs are updated to improve usability and readability. For example, in the Employee Central program, when a search returns multiple results, the program lists each result in a larger format with an expandable information section at the bottom.



When you select the Details option, the program displays the employee's detail page, which displays the employee header in a larger format and provides access to additional information through options in the ribbon.



Available Web Parts

Web parts are web-based portals that display information from various Tyler organizations or provide links to third-party applications. The following table provides a description of web parts available in Munis Version 10.3 for the Tyler Dashboard and Munis tenants.

Web Part	Description
Tyler Dashboard	
My Tyler Community	Provides direct access to Tyler Community items such as forums, conversations, and groups.
Munis	
eLearning Links	Provides a catalog of available Munis eLearning tutorials; when you click a tutorial link, the tutorial opens in a window outside of the Tyler Dashboard.