HRMS Reporting Workgroup Presentation

- **Logged Infotype Change Report**
  - Presented by Wendy Harris
- **Time Transfer (ZT60)**
  - Presented by Kelly Welsh

Agenda

- HRMS reports
  - Logged Infotype Change Report
- What you will learn
  - How report is used for daily review of actions
  - Supervisors review of their staff
  - Managers review and internal control
    - Actions on self
    - Actions on co-workers
    - Actions on fictitious employees
  - Promotes communication, audit and internal controls

HRMS Security Roles Matrix

- Logged Infotype Change Report

  S_AHR_61016380

Payroll /Benefit Roles	Personnel Roles	Financial Roles
	SR3P_DE_PERS_ADMIN_INQ	
	SR3P_DE_PERS_ADMIN_PROC	
	SR3P_DE_PERS_ADMIN_SUPV	

To gain <u>view only</u> access to this report, request the HR Inquirer role through your Security Administrator.

Use this report to ensure:

- Changes to EE records (necessary for the pay period) are being completed
- Internal controls are being followed for your agency.
- Accuracy and audit trails for actions processed in HRMS/ much like the release functionality in Pay1

Daily Audit Review

- Daily Audit by each employee
- Process by date order of actions for a day
  - find transfers posted as separations
  - incorrect coding for actions
  - process verifications
  - process completion of actions

Daily Audit Example

PersNo	00228124	SHEAHAN LARRY L			
Infotype	A 2013	Quota Corrections			
Doc.type	Long term	Changed b	00805502		
Date	05/21/2009	Time	13:03:49	Seq. no.	0001

Subty	Obj	Lck	From	To	No	Old record changed	Action
31			06/16/2006	06/16/2006	000	06/22/2006 CONVERT3	U

Field name	Old field	New field
*Number	104.70000	170.03332
Op	+	+
Transfer	X	X
AbQuotaTyp	31	31

PersNo	00228124	SHEAHAN LARRY L			
Infotype	A 2006	Absence Quotas			
Doc.type	Long term	Changed b	00805502		
Date	05/21/2009	Time	13:06:58	Seq. no.	0001

Subty	Obj	Lck	From	To	No	Old record changed	Action
31			06/16/2006	06/16/2006	000	05/31/2007 00878450	U

Field name	Old field	New field
*Number	113.36667	183.36665
Ded. to	12/31/9999	12/31/9999
Ded. from	06/16/2006	06/16/2006
AbQuotaTyp	31	31

Subty	Obj	Lck	From	To	No	Old record changed	Action
31			07/01/2006	07/31/2006	000	07/16/2007 TIDALSAP	U

Field name	Old field	New field
*Number	8.66667	13.33333
Ded. to	12/31/9999	12/31/9999
Ded. from	07/16/2006	07/16/2006
AbQuotaTyp	31	31

Logged Changes In Infotype Data Report

PersNo	00228124	SHEAHAN LARRY L	
Infotype	A 2013	Quota Corrections	
Doc type	Long term	Changed b 00805502	
Date	05/21/2009	Time 13:03:49	Seq. no. 0001

Subty	Obj	Lck	From	To	No	Old record changed	Action
31			06/16/2006	06/16/2006	000	06/22/2006 CONVERT3	U

Field name	Old field	New field
*Number	104.70000	170.03332
Op	+	+
Transfer	X	X
AbQuotaTyp	31	31

HRMS

Infotype **2013**

Display Quota Corrections (2013)

Personal work schedule | Activity allocation | Cost assignment | External services

Find by
- Person
  - Collective search help
  - Search Term
  - Free search

Personnel No	228124		Name	SHEAHAN...	Status Withdrawn
EE group	B	Civil Service Exe...	Personnel ar	1000	Attorney General
WS rule	FULL	5-8s: M-F ...			
Start	06/16/2006			Chg.	05/21/2009 00805502

Absence quota type 31 Annual Leave/Vacation

Change accrual entitlement

Quota number	170.03332	Hours

- (●) Increase generated entitlement
- ( ) Reduce generated entitlement
- ( ) Replace generated entitlement

Supervisor Review / Audit

- Higher level review opening up details for an entry only if questionable
- Review what was turned in by employee is what is on the report for the day
- Employees changing or updating own records in HRMS
- Possible capture of unknown missed data

Clip Board Helpful Hints

Use the clipboard to set up your variant for all your staff when running the report regularly

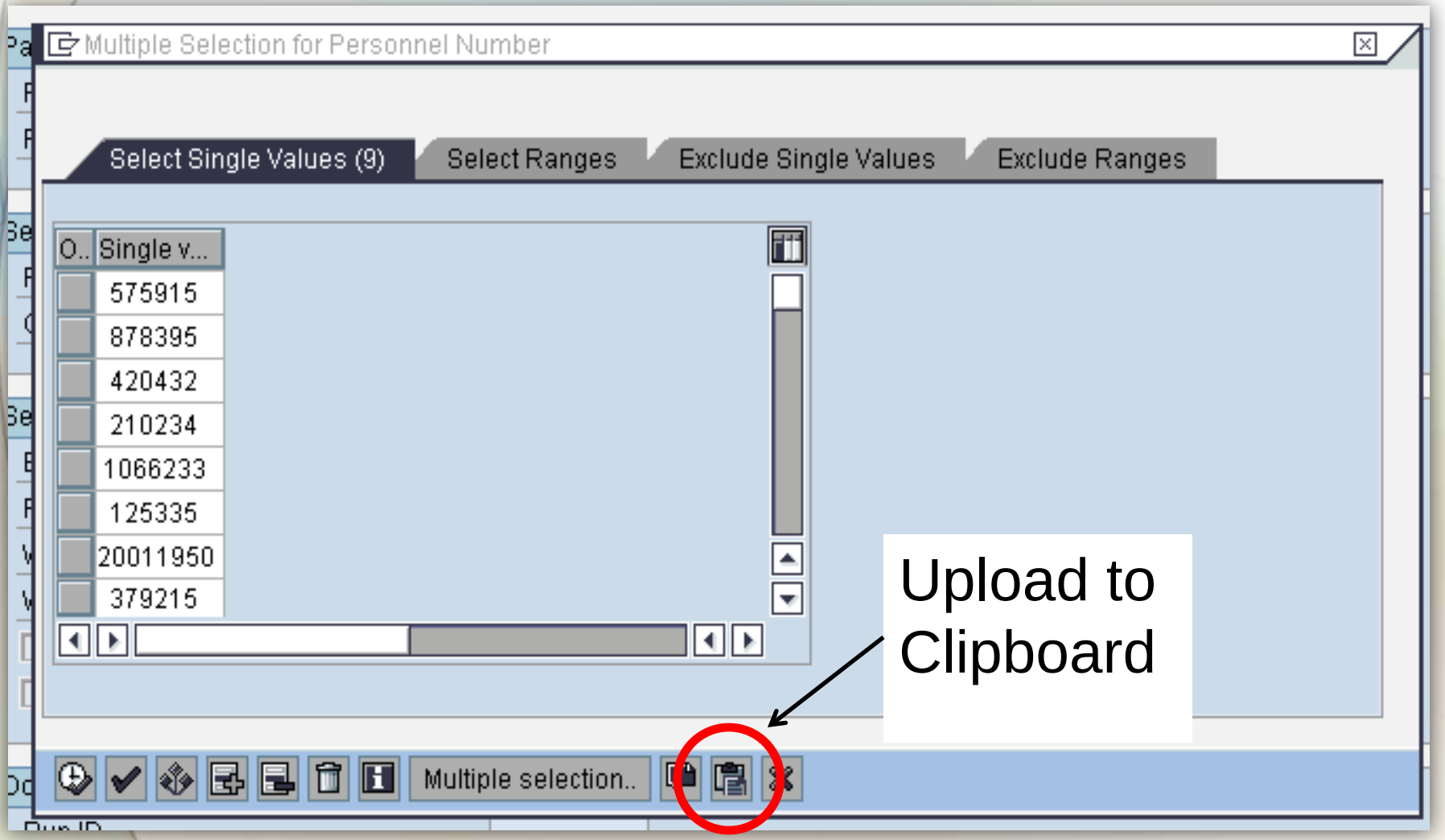
CTRL ‘C’ to copy

	A	B	C	D
1	Pay Perio	PA	Pers.No.	
2				
3	200815	3024	575915	
4	200815	3000	878395	
5	200815	3026	420432	
6	200815	3019	210234	
7	200815	3008	1066233	
8	200815	3024	125335	
9	200815	3024	20011950	
10	200815	3011	379215	
11	200815	3021	575754	

Clip Board Helpful Hints

- Use “Ctrl + C” on the keyboard *or* right click to copy the personnel numbers.
- Next, select the “Multiple selections” button in the HRMS “Selections” window. This is the yellow arrow next to the field for personnel numbers.
- Click on the “clipboard” icon shown below and this will copy all personnel numbers to the report.
- Click on the green check and execute the report as described above.
-

Clip Board Helpful Hints



Supervisor Review

Review activity of an employee changing or updating own records in HRMS. Ex below

Logged Changes in Infotype Data

Errors

Logged Changes in Infotype Data

Long-term documents

PersNo	Infotype	Date	Time	SqNo	Changed by
00805502	A 2013	08/08/2006	15:53:57	0001	00805502
00805502	A 2013	08/08/2006	16:00:03	0001	00805502
00805502	A 0015	09/21/2006	11:23:05	0001	00805502
00805502	A 0015	09/21/2006	11:23:53	0001	00805502
00805502	A 0014	09/21/2006	11:29:49	0001	00805502
00805502	A 0014	09/21/2006	11:30:50	0001	00805502
00805502	A 0105	06/28/2008	11:59:27	0001	00805502

Supervisor Review

- Monitor/review changes to employee's own records for appropriateness
- Supervisors can drill down each line for more details
  - By double clicking the line the item will open to give further details
- Consider using maintain text functionality in HRMS if employee must update their own records.

Supervisor Review (con't)

- Below we will show you an entry on Infotype 0105 Communications.
  - As you can see (in the coming slides) this is an example of an employee changing their e-mail address via ESS.

Note:
HR, Payroll, Manager, Security or staff with professional roles in HRMS will show entry as working on themselves when they use ESS to update their personal record.

Supervisor Review (con't)

- Communication Infotype 0105
  - Will be updated with ***email address*** changes ***only***.
    - See example on following slide.
- Address Infotype 0006
  - Will be updated with home ***address*** changes ***only***.
    - See example on following slide.

In HMRS, the Address Infotype 0006 **does not** show email address updates. See next slide.

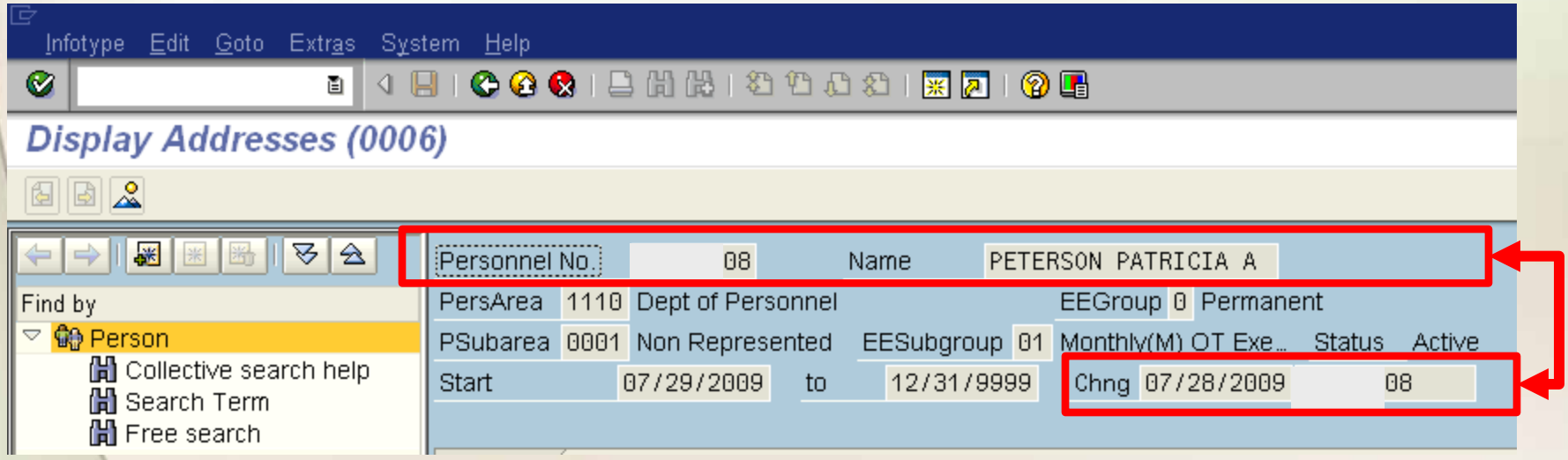
Employee Self Service change that shows on your report

PersNo 00805502 HARRIS WENDY A
Infotype A 0105 Communication
Changed by 00805502
Date 06/28/2008 Time 11:59:27 Seq.

This example comes from the Logged Changes in Infotype Data

Subty	Obj	Lck	From	To	No	Old record cha	
Field name			Old field			New field	
0010			01/23/2008	06/27/2008	000		I
ID/number							
*Long ID			Email address updates display			HARRIWA@DSHS.WA.GOV	
*Type						0010	
0010			06/28/2008	12/31/9999	000		I
ID/number							
*Long ID			Email address updates display			WAHARRIS@DOC1.WA.GOV	
*Type						0010	
0010			01/23/2008	12/31/9999	000	01/23/2008 00241172	D
ID/number							
*Long ID			HARRIWA@DSHS.WA.GOV	Email address updates display			
*Type			0010				

- Address Infotype 0006
  - Displays employee made a change on 7/28/09 to her own record via ESS.



Note with Possible Explanation for work on self

Service: Attachment list

New

AttachmentFor00805502

	Title	Creator Name	Created On
	Percentage	KIB EVELAND	08/04/2008
	1056 code for backpay	JEANNETTE E H...	12/13/2006
	training walla walla	WENDY HARRIS	11/07/2006
	3101 Test with DOP	WENDY HARRIS	09/21/2006
	Military	WENDY HARRIS	08/09/2006
	miliatary	WENDY HARRIS	08/08/2006

Fictional EE working on self

Logged Changes in Infotype Data

Long-term documents

PersNo	Infotype	Date	Time	SqNo	Changed by
00237670	A 2010	07/01/2006	14:54:15	0001	00237670
00237670	A 2010	07/01/2006	14:54:16	0001	00237670
00237670	A 2010	09/13/2006	08:35:13	0001	00237670
00237670	A 2013	09/14/2006	14:49:14	0001	00237670
00237670	A 2013	09/14/2006	14:50:17	0001	00237670
00237670	A 0007	03/30/2007	09:56:19	0001	00237670
00237670	A 0007	03/30/2007	09:58:14	0001	00237670
00237670	A 0015	02/12/2008	10:47:15	0001	00237670
00237670	A 0210	09/11/2008	10:08:19	0001	00237670
00237670	A 0210	09/11/2008	10:08:47	0001	00237670

What do these Infotypes mean Research the Wage Types

Infotype A 2010 Employee Remuneration Info
Changed by 00237670
Date 07/01/2006 Time 14:54:15 Seq. no. 0001

Subty	Obj	Lck	From	To	No	Old record changed	Action
Field name			Old field			New field	
1225			06/30/2006	06/30/2006	000		I
*Number						2.00	
ExtraPayID							
*Amount						0.00	
*ValBasis						0.00	
ExDocNo							
*WT						1225	
Obj.Type							
*Position						00000000	
Prem. no.							
*Premium ID						0000	
*Hours						0.00	
PS group							
PS level							
Comp. type							
Currency							
Tax Area							
*Unit						001	

Research the OT processing

Infotype A 2010 Employee Remuneration Info
Changed by 00237670
Date 07/01/2006 Time 14:54:16 Seq. no. 0001

Subty	Obj	Lck	From	To	No	Old record changed	Action
Field name			Old field			New field	
1232			06/30/2006	06/30/2006	000		I
*Number						8.00	
ExtraPayID							
*Amount						0.00	
*ValBasis						0.00	
ExDocNo							
*WT						1232	
Obj.Type							
*Position						00000000	
Prem. no.							
*Premium ID						0000	
*Hours						0.00	
PS group							
PS level							
Comp. type							
Currency							
Tax Area							
*Unit						001	
Func. Area							

Research Additional Payments

Infotype A 0015 Additional Payments
Changed by 00237670
Date 02/12/2008 Time 10:47:15 Seq. no. 0001

Subty	Obj	Lck	From	To	No	Old record changed	Action
Field name			Old field			New field	
1170			02/15/2008	02/15/2008	000		I
*Number						0.00	
*Amount						500.00	
->						(P0001) USD	
*Date of Origin						00/00/0000	
Ind.val.							
*WT						1170	
*Payr. Year						0000	
*Payr.Per.						00	
Reason							
Unit							
*Assign.No.						PERFORMANCE AWARD	
Func. Area							
Fund							

Withholding Changes on Self

Subty	Obj	Lck	From	To	No	Old record changed	Action
Field name			Old field			New field	
FED			06/01/2006	08/31/2008	000		I
*EIC status						0	
*Add.amount						0.00	
->						(P0001) USD	
Exempt							
*Form. No.						0	
*No.exempts						00	
*Tax aut RT						FED	
*Status						01	
FED			09/01/2008	12/31/9999	000		I
*EIC status						3	
*Add.amount						0.00	
->						(P0001) USD	
Exempt							
*Form. No.						0	
*No.exempts						00	
*Tax aut RT						FED	
*Status						01	
FED			06/01/2006	12/31/9999	000	06/23/2006 CONVERT2	D
*EIC status			0				
*Add.amount			0.00				
->			(P0001) USD				
Exempt							
*Form. No.			0				
*No.exempts			00				
*Tax aut RT			FED				

Manager Review

- Review security administrators activity
- Review HR, Payroll or Timekeeping activity
- Comparison of workload for units
- Agency staff working within classification
- Verification that staff are adhering to agency internal control policy

Actions by PRNR

Long-term documents

PersNo	Infotype	Date	Time	SqNo	Changed by
00031838	A 2003	07/19/2006	15:19:50	0001	00805502
00031838	A 2003	07/19/2006	15:22:40	0001	00805502
00044631	A 0015	07/19/2006	17:45:31	0001	00805502
00044631	A 0015	07/19/2006	17:45:37	0001	00805502
00044631	A 0015	07/19/2006	17:50:15	0001	00805502
00054630	A 0001	07/18/2006	08:54:21	0001	00805502
00054630	A 0008	07/18/2006	08:55:28	0001	00805502
00054630	A 0302	07/18/2006	08:53:44	0001	00805502
00071207	A 0015	07/19/2006	17:52:55	0001	00805502
00071207	A 0015	07/19/2006	17:53:02	0001	00805502
00071207	A 0015	07/19/2006	17:55:03	0001	00805502
00084636	A 0194	07/17/2006	10:07:43	0001	00805502
00084636	A 0194	07/19/2006	16:27:22	0001	00805502
00084636	A 0194	07/19/2006	16:27:50	0001	00805502
00084636	A 0194	07/19/2006	16:28:50	0001	00805502
00084636	A 0195	07/19/2006	07:34:23	0001	00805502
00084636	A 0195	07/19/2006	16:26:15	0001	00805502
00084636	A 0195	07/19/2006	16:28:28	0001	00805502
00090080	A 0008	07/18/2006	09:04:45	0001	00805502
00106342	A 2003	07/18/2006	13:26:35	0001	00805502
00129025	A 0002	07/25/2006	17:32:51	0001	00805502
00200925	A 0015	07/28/2006	10:23:39	0001	00805502

Action by Time input in HRMS

Long-term documents

PersNo	Infotype	Date	Time	SqNo	Changed by
00084636	A 0194	07/17/2006	10:07:43	0001	00805502
01129318	A 0008	07/17/2006	11:28:39	0001	00805502
00243368	A 2003	07/17/2006	16:00:29	0001	00805502
00881047	A 0416	07/17/2006	17:10:18	0001	00805502
01025149	A 0416	07/17/2006	17:30:41	0001	00805502
00703340	A 0416	07/17/2006	17:55:23	0001	00805502
00703340	A 0416	07/17/2006	17:56:38	0001	00805502
00054630	A 0302	07/18/2006	08:53:44	0001	00805502
00054630	A 0001	07/18/2006	08:54:21	0001	00805502
00054630	A 0008	07/18/2006	08:55:28	0001	00805502
00090080	A 0008	07/18/2006	09:04:45	0001	00805502
00567578	A 0008	07/18/2006	09:09:10	0001	00805502
01114052	A 0008	07/18/2006	09:10:07	0001	00805502
00874730	A 2003	07/18/2006	12:23:39	0001	00805502
00106342	A 2003	07/18/2006	13:26:35	0001	00805502
00913070	A 2003	07/18/2006	14:33:55	0001	00805502

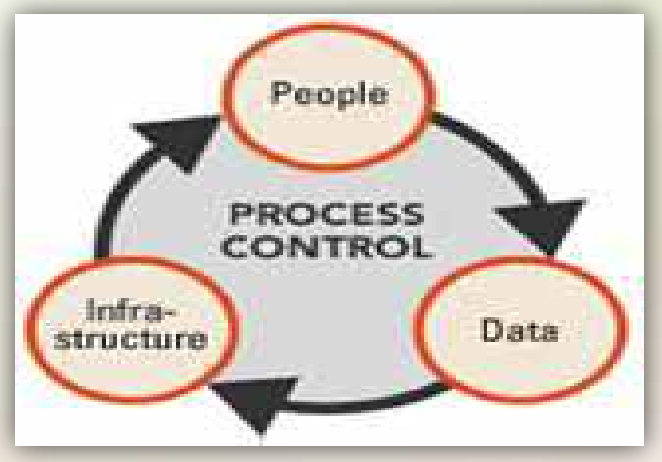
Action by Infotype

Long-term documents

PersNo	Infotype	Date	Time	SqNo	Changed by
00337621	A 0000	07/19/2006	09:38:06	0001	00805502
00337621	A 0000	07/19/2006	09:48:23	0001	00805502
00054630	A 0001	07/18/2006	08:54:21	0001	00805502
00129025	A 0002	07/25/2006	17:32:51	0001	00805502
00492953	A 0002	07/28/2006	16:48:50	0001	00805502
01188979	A 0007	07/18/2006	17:51:08	0001	00805502
01200299	A 0007	07/18/2006	17:52:35	0001	00805502
01200777	A 0007	07/18/2006	17:53:34	0001	00805502
00054630	A 0008	07/18/2006	08:55:28	0001	00805502
00090080	A 0008	07/18/2006	09:04:45	0001	00805502
00567578	A 0008	07/18/2006	09:09:10	0001	00805502

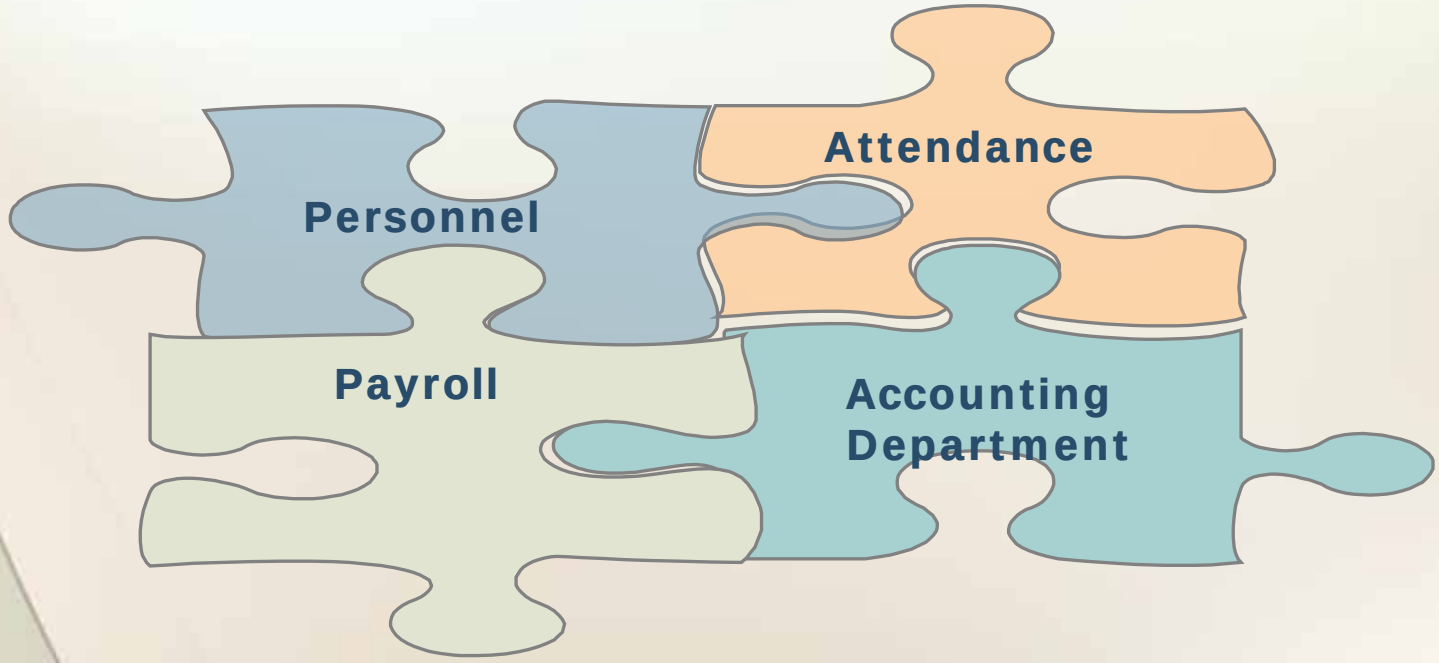
Electronic Files vs Hard Copies

- There are excellent Electronic storage options as well as excel for exporting
- Keeping records on line with ability to make notes and review signatures
- Pro/Con
  - Pro / Saving paper
  - Pro /Easier storage
  - Con / Difficulty reading
  - Con / Source with Report



Internal Control

- Excellent tool for both Managers and Supervisors to ensure correct staff are not crossing over into Infotypes that are not appropriate for their job class



Some Risks

- Employee runs the report excluding something they do not want their manager to see
- Unmonitored reports or activity
- Unawareness of the benefits and features of this report
- Lack of documentation for auditor
  - Processes/ Desk manual
  - Review actually has occurred (Initials)
  - Monitoring effectiveness

Continuing Education

- This report can be an excellent tool continue on with us next month for the 3rd in a 3 part series when we have some agencies share how they use this report to ensure audit trail, reduce audit findings by showing due diligence and more.

Questions