HRMS 101: Basic Concepts
HRMS 101: Basic Concepts - Session Agenda

**Lesson 1: Introduction to HRMS**
- Change Management
- Banner, HRMS and Wayne State University
- Features & benefits of HRMS
- Time Table / Conversion Schedule

**Lesson 2: Training and Support**
Topic 1: Training Overview
- Course flowchart
- Course descriptions
- Sign-up / contact information
- Job Aids

Topic 2: Support Information
- Help Flowchart
- M.O.B.
- What is The M.O.B.

**Lesson 3: New and Revised Concepts**
Topic 1: Some HRMS Terminology & Other Information
Topic 2: FOAPAL and Index Defined
Topic 3: HR Business Process Changes

**Lesson 4: Process Changes**
Topic 1: Payroll Process Changes
- Multiple Paychecks
- Effective date versus personnel date
- *Exception Basis* timesheet reporting
- 26.09 versus 26.10 pay period
- Termination date
- Lost / stolen paycheck handling

Topic 2: Web-Time-Entry
- Deadlines
- Timelines

Topic 3: Web for Employees

Topic 4: Benefits Changes

Topic 5: Labor Changes
- Retroactive Labor redistribution training

Topic 6: Position control

Topic 7: Changes in HR Forms
- Authorization
- List of Forms
- Conversion Chart – Paper forms to Web Forms

Topic 8: Block Changes

Topic 9: Visa Reports
HRMS 101: Basic Concepts - Session Agenda - cont.

Lesson 5: Technical Changes
- Topic 1: Web Access
- Topic 2: Security
  - Migration of existing HRS users
  - New HRMS users
- Topic 3: Discoverer Viewer – reporting tool
- Topic 4: WSU campus address

Appendix 1: Banner Web Access
- Topic 1: System requirements
- Topic 2: Browser plug-in
- Topic 3: Required setting change

Additional Resources:
- “Position Roll Out” white paper
- E-Report Handout
- Welcome to HRMS Web Forms Job Aid & Their Application
- Job Aid / HRS-HRMS Crosswalk
  - Key HRMS Terminology
  - E-Class (Employee) Codes
  - Job Change Reason Codes (Event Codes)
  - School / College / Division Codes
  - Visa Codes
  - Termination Codes
  - Banner Shift Codes
  - Position Status Tracking Attributes Codes
  - Position Class Codes
  - Help Flowchart

Session Agenda - continued
Lesson 1: An Introduction to Banner & HRMS
Lesson 1: Introduction to HRMS—Banner

Introduction Overview
Assuming the Human Resource Management System (HRMS) is new to you, it is critical that you understand its role and function at WSU, the information systems that interface with it, and its major features.
Introduction: The Function of HRMS—Banner

HRMS is one product of the Banner suite of software applications. These products provide access to a common database so that information can be shared across different systems that administer the functions of the University. Currently, Alumni/Development and FMS are the only systems “live” here at WSU, with HRMS & Student on the way.

As is, the Banner system will offer enhanced user convenience and flexibility. This will be even more notable as further Banner programs are implemented.

Overall, HRMS provides a comprehensive, integrated Human Resource Management System which enables you to track, maintain, and process all of your relevant human resource data.
HRMS, Human Resource Management System, is a University-wide system which enables you to track, maintain and report your department’s important HR resource data.

Let’s begin by taking an overall look at HRMS and its connection to other operations here at WSU, as illustrated with the graphic on the right.

With this common database, data need only be entered once!
Discussion: Major Features of HRMS

HRMS includes the following major features...

**Web Enabled functionality** — Banner 5.x provides many features and functions which are accessible via standard internet connections. A primary benefit is an improved access and performance experience.

**Comprehensive Reporting** — You can access numerous standard hard copy reports and online inquiry forms.

**User Friendly Design** — Banner looks and operates like many of the typical “windows” applications you’re already using! Menus and the mouse are available to assist infrequent users.

**Online Data Entry** — When you enter data in a field, the system checks it for **accuracy** (that is, the system subjects the data to the appropriate validation test) before the cursor continues to the next field for an update. If the system finds an error, an appropriate error message displays and no database update occurs. After you correct the error, the cursor moves to the next field.

**Easy Data Entry and Update** — Banner forms allows you to enter, maintain and update data and related information with ease.
Intentionally Blank
Lesson 2: Training and Support
Lesson 2: Training and Support

Lesson Overview

As a part of this major system implementation here at Wayne State University, a full curriculum of training classes have been developed specific to using Banner in the WSU environment. These classes will help prepare you with the technical and detailed information you will need to adapt to working with Banner HRMS.

In addition to the customized training opportunities, a comprehensive support mechanism has been built to further ease the transition from HRS to Banner HRMS.

This lesson will outline the Training Curriculum and HRMS Support system.

Lesson Agenda

Topic 1: WSU approach to Training
- Course descriptions
- Course flowchart
- Contact information

Topic 2: Support Information
- HRS to HRMS Job Aid / Crosswalk
- Help Flowchart
- M.O.B. – what is it, and who are they?
Topic 1: WSU Approach to Banner Training

Training Development Approach
Wayne State University elected early in the planning stages of the Banner HRMS project to *custom design* user training on the Banner system. Consequently, WSU Banner training not only teaches how to use the software, but more importantly, how to use the software to conduct WSU business. With a focus on “task specific” instructional design, WSU Banner training is based on common inquiries, reports and functions. As a result, users are significantly better prepared to adapt their job functions to the Banner HRMS system.

Training Delivery Approach
Another decision which has greatly improved the learning process is the use of “peer trainers”! Trainers for the HRMS classes which focus on using Banner to process WSU information are people who actually do those WSU jobs. They have volunteered to learn the new system, receive coaching on how to be a more effective trainer and are stepping in front of fellow users to help make learning Banner a more dynamic experience. Peer trainers are found leading the Inquiries–General and Inquiries–Labor and E-Reports classes.

And not to overlook the other HRMS subjects, professional trainers have been brought into the process to present the informational oriented classes. You'll find these folks not only here in HRMS 101: Basic Concepts, but also the web related classes and E-Reports.

In Summary
This creative approach to training creates a dynamic learning opportunity that, when coupled with a commitment on the part of the learner will significantly contribute to a successful implementation of the Banner HRMS system.
<table>
<thead>
<tr>
<th>Session Name</th>
<th>You learn how to:</th>
<th>Pre-requisite(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation</td>
<td>Basic introduction to the features and use of the Banner software.</td>
<td>• HRMS 101: Basic Concepts</td>
</tr>
<tr>
<td>Inquiries – General</td>
<td>Perform general person inquiries using specific form procedures.</td>
<td>• HRMS 101: Basic Concepts</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• HRMS-Navigation</td>
</tr>
<tr>
<td>Inquiries – Labor</td>
<td>Perform inquiries on payroll such as labor distribution and employee distribution using specific form procedures.</td>
<td>• HRMS 101: Basic Concepts</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• HRMS-Navigation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Inquiries – General</td>
</tr>
<tr>
<td>Web for WSU Employees</td>
<td>View and change your personal information as needed.</td>
<td>• PC &amp; Web Supplemental Training or equivalent experience</td>
</tr>
<tr>
<td>Changes in HR Forms</td>
<td>Electronic based payroll/personnel forms</td>
<td>• HRMS 101: Basic Concepts</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Inquiries – General</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Inquiries - Labor</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• PC &amp; Web Supplemental Training or equivalent experience</td>
</tr>
<tr>
<td>Web Time-Entry</td>
<td>Electronic based timesheet reporting</td>
<td>• PC &amp; Web Supplemental Training or equivalent experience</td>
</tr>
<tr>
<td>E-Reports</td>
<td>Generate reports based upon needs with data from HRMS-Data marts.</td>
<td>• HRMS 101: Basic Concepts</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• PC &amp; Web Supplemental Training or equivalent experience</td>
</tr>
</tbody>
</table>
Training: Sign-up / Contact Information

Reservations for all HRMS training classes are being processed through the Training and Development Department, located in the Academic/Administration Building. Visit Training and Development’s website at: www.hr.wayne.edu/trd/ for a complete listing of contact information, class descriptions and schedules.

Phone number: 577-2111
Fax number: 577-3569

Appendix 2 provides:
- Detailed class descriptions
- Class schedules
- An enrollment form & registration fax number
LESSON 2: Training and Support
Support: Help Flowchart

HRMS Banner Help – Questions with Business Processes

WSU Business Process, Training

HR Benefits

HR Payroll

HR Personnel Processing & Records

Banner ID & password
System Access

S/C/D MOB*

Benefits 7-3717

Payroll 7-2138

Personnel Processing & Records 7-2020

C&IT Information Security 7-3203
security@wayne.edu

HR Employment Services

Employment Services 7-2010

HR Training

Training 7-2111

Banner software, Installation, System Availability

C&IT Help Desk 7-4778
Helpdesk@wayne.edu

Hardware problems
Non-Banner software, Local network

Your local S/C/D LAN Support

Data Access Team
DAT@lists.wayne.edu

*Find the M.O.B. roster at: uis.wayne.edu/wb2k/training/Mobs/Contact/index.htm
Support: The M.O.B.

One of the most powerful sources of support to the implementation of Banner HRMS is the M.O.B. M.O.B. stands for Mentors of Banner. The members of this organization are volunteers from all areas of Wayne State University, and can be found in nearly every School/College/Division.

Members of the M.O.B. will:

- Help identify users who will need HRMS training
- Disseminate training information
- Facilitate the exchange of information on WSU business processes & issues among their peers
- Provide feedback to the Training Team

These fellow Banner users have also been provided preview training, additional contact resources and are a great source of information regarding HRMS.

For more information on the M.O.B. and a roster of MOB’sters, visit their homepage:

http://uis.wayne.edu/wb2k/training/Mobs/HRMS-MOB/index.htm
Lesson 2: Review

In this Lesson you learned:

Topic 1: WSU Approach to Banner Training
  • Course flowchart
  • Course descriptions
  • Sign-up / contact information
  • Job Aids

Topic 2: Support Information
  • Help Flowchart
  • The M.O.B. and where to find more information about them
Lesson 3: New & Revised Concepts
Lesson Overview

All Banner modules at WSU (FMS, HRMS, Student, etc.) work in conjunction. Quite often, HRMS users will need to interact with the FMS financial data in HRMS forms to learn about budgets, salaries, etc. To effectively use any such financial-related functions, you must understand the concept of FOAPAL.

Perhaps the most significant change in the way WSU does business has to do with how HRMS treats positions. The basic change is that each employee will receive a position number that is unique to them. However, assuming an employee leaves WSU, an employee who is hired to replace them, can assume that position number.

In the next few pages you will learn about the meaning of FOAPAL codes and how positions and employee classes (E-classes) are defined.

Lesson Agenda

Topic 1: Some HRMS Terminology & Other Information
Topic 2: FOAPAL and Index Defined
Topic 3: HR Business Process Changes
In preparation for a discussion on new HRMS concepts, let’s introduce some terminology, and HRS to HRMS translations.

<table>
<thead>
<tr>
<th>HRS Term</th>
<th>HRMS Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object Code</td>
<td>Account</td>
</tr>
<tr>
<td>Account</td>
<td>Index Code</td>
</tr>
<tr>
<td>Boardline</td>
<td>Typically, in General Fund, “Fund”</td>
</tr>
<tr>
<td>*FTE</td>
<td>Appt %</td>
</tr>
<tr>
<td>Job Groups / Job Codes</td>
<td>Employee (E) Classes</td>
</tr>
<tr>
<td>Class Codes</td>
<td>Position Class</td>
</tr>
<tr>
<td>Group Positions</td>
<td>Pool Positions</td>
</tr>
<tr>
<td>Department Code</td>
<td>Home Department or Home Organization</td>
</tr>
</tbody>
</table>

* FTE will have different functionality in Banner – see HRS to HRMS Crosswalk / Job Aid for more detail.
Discussion: Three Uses of Organization in Banner

Banner uses the term organization in three distinctly different ways…

**FOAPAL Organization (ORG) Code**

This code specifically references a financial accounting context, and identifies the budget unit of the S/C/D or department that is processing a transaction.

Examples: Dean of Libraries, Center for Urban Studies, College of Engineering

**Home Organization / Home Department**

In Banner, Home Organization is the department the employee works in. An employee can have only one Home Organization. The naming convention used will be the letter “H” followed by the first 4 characters of the current HRS department code (dropping the trailing zero).

Example: HRS code 49060 => Banner Home Organization / Home Department H4906

*Note: Banner, E-Reports & HR Web-forms see Home Organization & Home Department as being equal!*

**Time Sheet Organization**

Time Sheet Organization identifies the department that the employee's current job time sheet will be sent to. The naming convention will be the letter H followed by the entire current HRS department code. Example: H49060
Topic 2: FOAPAL and Index Defined

The FOAPAL string of codes is the core of the Banner Financial Management System (FMS), and as such, is very important to all HRMS users. FOAPAL is the hierarchy coding system FMS uses for classification, budgeting, and recording. It also gives users the ability of reporting and making inquiries at multiple levels.

What you will learn in this topic:

The definition of FOAPAL

The definition of the FOAPAL acronym

The definition of Index and how it relates to FOAPAL

Items needed to complete this topic:

None
Discussion: Definition of FOAPAL

*FOAPAL is the hierarchy coding system used by Banner for classification, budgeting, and recording of financial information and transactions.*

The use of the FOAPAL string also provide the ability to report and make inquiries at multiple levels.
Discussion: FOAPAL Terms & Definition

FOAPAL & Related Terms

Chart of Accounts is a systematic classification of accounts within HRMS. WSU uses only one COA: W

FOAPAL is the hierarchy coding system used by HRMS for classification, budgeting, and recording.

Elements are segments of the FOAPAL string of hierarchy values or codes and are made up of a maximum of six characters. These elements may be made up of letters, numbers, or a combination of both.

Index Code is a six character code that serves as a shortcut to many of the FOAPAL string combinations.

(Reminder: the Index Code is the new term for the OLD “account number”)

Fund identifies the source from which the money is being drawn.

(Reminder: in General Fund, “Fund” = “Boardline”)

Organization identifies the budget unit of the school, college, division, or department that is processing the transaction. Examples: Dean of Libraries, Center for Urban Studies, College of Engineering

Account identifies what financial activity is being recorded. Examples: assets, liabilities, fund balance, revenues, expenditures, transfer.

(Reminder: Account is the new term for the old HRS Object code)

Program identifies the purpose of the transaction. Examples: instruction, academic support, research

A = Activity is not currently used at WSU.

L = Location is used only for plant funds and not found in typical HR usage.
## Discussion FOAPAL String Quick Reference

<table>
<thead>
<tr>
<th>Acronym</th>
<th>COA</th>
<th>F</th>
<th>O</th>
<th>A</th>
<th>P</th>
<th>A</th>
<th>L</th>
</tr>
</thead>
<tbody>
<tr>
<td>Element</td>
<td>Chart of Accounts</td>
<td>Fund</td>
<td>Organization</td>
<td>Account</td>
<td>Program</td>
<td>Activity</td>
<td>Location</td>
</tr>
<tr>
<td>Identifies</td>
<td></td>
<td>Where the money is drawn from</td>
<td>Budget unit of the School, College, Division, or Department processing the transaction</td>
<td>What financial activity is being recorded</td>
<td>Purpose of the transaction</td>
<td>N/A</td>
<td>Physical Location</td>
</tr>
</tbody>
</table>

| Maximum length | 1 | 6 | 6 | 6 | 6 | 6 | 6 |
**Discussion: Index Codes**

*Index Code* is a six character code that serves as a *shortcut* to many of the FOAPAL code string combinations. The index code will typically *automatically* populate the Fund, Orgn, and Prog fields!

You must always provide the Account Code (Acct) yourself.

Reminders: HRS *Object Code* => HRMS *Account*

HRS *Account* => HRMS *Index Code*

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*Note:* Business managers can generate a custom BAR report which provides an Index=>FOAPAL translation.
As stated before, the most significant change in how HRMS affects WSU business processes is its treatment of position numbers. Over the next few pages, you will learn how to make the transition from the “old” way to the “new” way…the HRMS way.

What you will learn in this topic:

• The new meaning of positions and position numbers
• The numbering conventions of positions
• The definition of E-Classes
## Discussion: Positions

<table>
<thead>
<tr>
<th>HRS</th>
<th>HRMS</th>
</tr>
</thead>
</table>
| • Any general fund position is defined as a six digit number  
• Inability to track positions (i.e. who belongs to what department)  
• No departmental ownership | • Each employee* that receives benefits (i.e. “regular” employee) from WSU will have an individual position number that is specific to that employee’s *job*.  
• Position number no longer has any relation to funding. Funding for a position is now detailed in its unique FOAPAL string(s).  
• Ability to track positions  
• Position ownership is now transferred to the department |
| • Few group positions  
• Group positions are not considered to be at the department level | • Now known as *pool* positions  
• Pool positions can have more than one occupant  
• Employees in groups where the relationship with the university is more casual will have pool positions.  
• Pool positions are at the department level** |

*Except graduate assistants  
** Except Part-time Faculty
Discussion: Positions

Position Roll Out

Single vs. Pool Positions

Each “regular” employee in HRMS will have an individual position. Single positions will be further subdivided into seven groups: Pool, Academic Staff, Non-Academic, Faculty, Research, Residual, and Temporary.

The source of funding will be irrelevant to the numbering of positions.

Each person should not have more than one position unless they are working two truly different jobs. Example: AAUP-AFT Represented Faculty and Part-time Faculty.

Grant and contract positions will be created in Human Resources. Any position that is funded in full, or part, from General or Auxiliary Funds will be created and modified in University Budget.

Pool Positions (P)

Each department will have a pool position for each classification (PCLS) that uses pool positions (ie Clerical, Professional, Service, Non-rep Professional, etc.). New pool positions will be created in Human Resources.

Employees in groups where the relationship with the University is not considered long term will have a pool position. These jobs include students, technicians, part-time faculty, and graduate assistants.

Temporary (T)

Temporary positions will be used for positions that are intended to have a temporary life, such as interim assignments and STFP positions. No specific E-class will normally be assigned to this category, but positions in all the non-pool categories may be created as temporary positions.

See additional course materials for a detailed discussion regarding Position Groups.
Discussion: Positions - cont.

Position Roll Out - cont.

Conversion

• The initial conversion of positions to this new scheme will be done as part of the automated conversion process.
• This will allow for the creation of the many new positions needed as pool positions are moved down from the University level to the department level.
• Each employee in a regular job will be given an individual position number.
• All of the assignments in HRS that are currently under separate assignments because of funding differences will be combined so that each employee in a regular job will have one assignment.
• This assignment will be assigned to the same Organization as their Home Department, although it will be possible to change this manually.
• This assignment can be paid from as many labor accounts as are necessary, whatever the fund or organization associated with this labor distribution.
• All of this conversion will be done programmatically, but units will be provided reports to verify the data converted is correct.
Discussion: Positions - cont.

Position Roll Out - cont.

When Positions Change

- **Reclassification of Position** - keep the same position number and change the classification on the position. In NBAJOBS, assign the employee to a new job using the same position number and a new suffix.

- **Reclassification of Position (Temporary)** - create a new temporary position number and change the classification on the position. In NBAJOBS, assign the employee a new job using this new temporary position number.

- **Promotion within the same organization** - assign a new position number.

- **Promotion in another organization** - Assign a new position number.

- **If position is transferred from one School/College/Division to another** - Position number goes with it; stays the same. Simply change the Org number on the position.

- **Employee leaves WSU** - the new replacement employee will assume

- **Academic promotion** - will be done through the Mass Salary process.
Discussion: Positions

Position numbers will begin with their respective single-character acronym (see below) followed by five numbers beginning with 99999 and descending from that number (see table below for listing).

<table>
<thead>
<tr>
<th>Position Group</th>
<th>Acronym</th>
<th>Example of Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pool</td>
<td>P</td>
<td>Students, Technicians, Part-time Faculty, and Graduate Assistants</td>
</tr>
<tr>
<td>Academic Staff</td>
<td>A</td>
<td>Job Group “G”, Librarians, Academic Advisors, Financial Aid Officers, Academic Services Officers</td>
</tr>
<tr>
<td>Faculty</td>
<td>F</td>
<td>Job Group “E” &amp; “4”, Deans, Assistant, Associate &amp; Professors, Chairs, Academic Directors</td>
</tr>
<tr>
<td>*Temporary</td>
<td>T</td>
<td>Unique position! STFP, Temporary Faculty</td>
</tr>
<tr>
<td>Non-Academic Staff</td>
<td>N</td>
<td>Everyone else - i.e. President, 1710 Object Codes, P&amp;A, Managers, Public Safety, Custodians</td>
</tr>
<tr>
<td>Residual</td>
<td>R</td>
<td>Currently from your unallocated funds - “Roster pool” - “Salary savings”</td>
</tr>
</tbody>
</table>

*NOTE:

- No specific E-Classes will normally be assigned to this category.
- Temporary positions for all of the Non-pool categories may be created here.
Review: HRMS and WSU Business Processes

In this Lesson you learned:

- Definition of FOAPAL (Topic 1)
- FOAPAL string of codes explanation (Topic 1)
- Definition of Index Codes (Topic 1)
- Definition of Positions (Topic 2)
- Definition of E-Classes (Topic 3)
Lesson 4: Business Process Changes
Lesson 4: Business Process Changes Overview & Agenda

Lesson Overview

With the implementation of, and because of the improved functionality of Banner HRMS, there will be changes in some Wayne State University HR business processes. Although the changes may be few in number, they are nonetheless significant. From an overview-level, you can expect the changes cited in the topics below.

Lesson Agenda

Topic 1: Payroll Process Changes
Topic 2: Web Time Entry
Topic 3: Web for Employees
Topic 4: Benefits Changes
Topic 5: Labor Changes
Topic 6: Position Control
Topic 7: Changes in HR Forms
Topic 8: Block Changes
Topic 9: Visa Reports
Topic 1: Payroll Process Changes

• Employees can receive multiple paychecks. BW, 9M and PTF are separate payroll processes.
  
  Example: An employee who has a part-time faculty assignment in addition to a regular assignment will receive two separate checks. One check for the part-time faculty payment and one check for the regular assignment payment.

• Stipends will be processed through Payroll beginning January 1, 2003. They will not be done through Disbursements. This allows for easier processing of benefits and deductions.

• Stop payments and re-issuance of lost and stolen paychecks will be handled by the Payroll department only for those checks cut and issued after the HRMS implementation.
Effective Date vs. Personnel Date

- No action in Banner can have an “effective date” prior to the last paid date. If it does, it is necessary to use the “personnel date” to record the actual begin date in NBAJOBS. This date is not seen in some of the system views.
- The Personnel Date is actually the “true effective date”, but no Banner calculations base off this field.
- The Effective Date is merely the first day of the pay period in which the transaction / change was processed into the Banner system.
- Changes to labor and to most benefits and deductions do not have a true effective date. However, WSU has added the true effective date to medical and dental benefits.

Example: “True effective” date of a promotion: 3-1-02. PPR processed on 4-19 = Banner effective date of 4-15-02.

Quiz: What is the ‘personnel date’?

Exception Basis timesheet reporting will be reported the same as it always has… except via the Web Time Entry

The New 26.1
WSU will be changing from 26.09 to 26.1 pays per calendar year. To ensure that no one loses any money in their biweekly paycheck, Payroll will be doing a mathematical conversion that gives all 12-month employees a (one to two cents) increase in their paycheck. The actual amount earned per check will be almost identical. 9 month employees not affected by this change.
Topic 2: Web Time Entry

- Over a period of ninety days to six months after HRMS implementation, all WSU employees will be phased into the Web Time Entry process.
- Paper timesheets will be eliminated except for processing late documents or corrections.
- A “timesheet-approving supervisor” will be able to establish a proxy so that approvals can be completed even in the supervisor’s absence
  - One or two people in a unit will be “super-users” who can approve timesheets in the event that neither the supervisor nor proxy did so.
  - Payroll is the final super-user and in an emergency situation they could approve timesheets if no one in a division had done so.
- Exempt (FLSA) Employees not eligible for overtime (i.e., Job Groups E, F, G, H, I, Q, X, Z, 4) will not need to have timesheets approved. Of course, their time will still be approved in advance.
- Leave Codes are exactly the same as they were for HRS “Time types”
- New paper timesheets will be issued for use during the transition to web time entry.
**Topic 3: Web for Employees**

Web for Employees brings your personal Banner information right to your computer.

This includes:

- Employee information
- Personal information
- Leave history
- W-2 information
- Pay stubs / deduction detail

You can also view or update your:

- Home address
- Phone number
- Emergency contact information
- Marital status*
- Personal Identification Number (PIN) or password.

*NOTE: Changes made in marital status via Web for Employees will NOT make adjustments to W4 or benefits elections!
Topic 4: Benefits Changes

No new information to share at this time…
Topic 5: Labor Changes

- Labor changes will no longer change the job. Only labor will be changed as indicated in the associated FOAPAL.

- Retroactive labor distributions cannot be entered on the employees' jobs. A multi-part form, Change In Labor Distributions and Re-distribution Form, is sent to Personnel Processing and Records. Personnel Processing and Records will enter present and future actions. If there is no retroactive component the form is filed. If the action is partially retroactive, the form is forwarded to Sponsored Programs Administration (SPA) if any of the retroactive portion involves a grant / contract, or, the form is sent to Payroll if the change is to general / auxiliary fund.

- Changes in labor will no longer result in a “new assignment”.

- Labor is no longer connected to the job record
Topic 6: Position Control

- Position numbers assigned by Budget Office for 100% General Fund, Partial General Fund and Auxiliary Funds.
- The paperwork flow to request a new position and changes in a current position remains the same.
- Positions are defined within the position class by fiscal year.
- The New Position Request form and the Position Change Request form are available on the web.
- Banner provides for four position statuses as found on Banner form NBAPBUD:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>The majority of positions should be in active status.</td>
</tr>
<tr>
<td>Inactive</td>
<td>Inactive position status in HRMS Banner is used when a position is on hold. This status can be used for RTRT positions. It is not being used for positions that are funded from frozen positions.</td>
</tr>
<tr>
<td>Frozen</td>
<td>This will be used when a position is at a standstill and cannot be used for a personnel assignment because a temporary position is being funded from the frozen position.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>An example of a cancelled (closed) position status is an elimination of a position due to budgetary constraints.</td>
</tr>
</tbody>
</table>

- All other HRS position statuses will be tracked/mapped to Banner using codes that will be reported on the NBAPBUD form in the “Authorized By” field. See HRS to HRMS Crosswalk & Job Aid for code tables.
- In the context of position control, HRS “Pool” positions => HRMS “Residual” positions
Topic 7: Changes in HR Forms

• Many HR forms will be available on the web for easy access and filling out.
  http://hrms.wayne.edu/hrms/forms.htm

• These web-based forms will completely replace the following paper forms: PASS’s, PEF’s, NPA’s and 1489 forms.

• These forms do not feed the Banner System.

• The form can be prepared online and printed and mailed, or saved and e-mailed.

• The business process is nearly the same – Minor adjustments have been made that will be covered in the Changes in HR Forms training.

• Forms sent by e-mail must come from the e-mail address of the person who otherwise would have been an authorized signer or approver of a printed version of the form.

• All previously established supporting documentation requirements remain unchanged.

• Tip: if a webform is part of a package or bundle of documentation related to the change(s) being implemented, then it is recommended to save, print and include the webform in the normal procedures associated with the change. See additional handout HR Forms and Their Application
### Topic 7: Changes in HR Forms – cont.

#### Lesson 4: HRMS & WSU Business Processes

#### Topic 7: Changes in HR Forms

#### HR Web Forms to HRS Paper Forms Conversion

<table>
<thead>
<tr>
<th>NEW FORM</th>
<th>OLD FORM</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Labor Distribution / Re-distribution Form (Multi-part paper)</td>
<td>PASS</td>
</tr>
<tr>
<td>2. Assignment of Salaried Part-Time Faculty</td>
<td>PASS</td>
</tr>
<tr>
<td>3. New Hire</td>
<td>PASS &amp; Tech Request</td>
</tr>
<tr>
<td>4. Change in Job Detail</td>
<td>PASS</td>
</tr>
<tr>
<td>5. Change in Job Position Number</td>
<td>PASS</td>
</tr>
<tr>
<td>6. Change in Check Distribution</td>
<td>PASS or E-Mail</td>
</tr>
<tr>
<td>7. Change in Timesheet Organization</td>
<td>PASS or E-Mail</td>
</tr>
<tr>
<td>8. Last Day of Work / Pay Notice</td>
<td>1st/Last Day of Work</td>
</tr>
<tr>
<td>9. Termination</td>
<td>PASS</td>
</tr>
<tr>
<td>10. Position Change Request Form</td>
<td>1489</td>
</tr>
<tr>
<td>11. New Position Request Form</td>
<td>1489</td>
</tr>
<tr>
<td>12. Posting Request Form</td>
<td>1489</td>
</tr>
<tr>
<td>13. Employee Data</td>
<td>Employee Profile (EPF)</td>
</tr>
<tr>
<td>14. OISS Clearance for Non-Immigrant Employee</td>
<td>Same Name</td>
</tr>
<tr>
<td>15. Late Timesheet</td>
<td>Time/Exception Report</td>
</tr>
<tr>
<td>16. Correction Timesheet</td>
<td>Time/Exception Report</td>
</tr>
</tbody>
</table>

**Lesson 4: HRMS & WSU Business Processes**

**Topic 7: Changes in HR Forms**
Topic 8: Block Changes

“Block Change” Summary - DRAFT!!

- "Reassignment of Personnel from Expired Grant Account" report is not going to be available after HRMS implementation.
- SPA will continue, for an indeterminate time, sending a summary report to S/C/D's. These reports will be based on “college” level information.
- The replacement to the “Reassignment...” report is the E-Report HR.HR020A “Grant Expiring Report”. This report will be run by the S/C/D.
- E-Report “Grant Expiring Report” can be sorted by Division and Home Organizations, and set to show expiring grants for as far out as 6 months in the future.
- S/C/D's can establish their own reporting requirements for their units. (SPA recommends first of the month)
- Each department will have their own Suspense General Fund - when payroll charges occur on an expired grant/contract, they will automatically be charged against the unit’s suspense fund.
- Departmental suspense funds need to be cleared by end of the fiscal year.
Reporting labor changes, 2 scenarios:

1) If a grant/contract is not continuing, and, the employees will be moving to an equal FTE replacement source/FOAPAL...
   
   **Action to take:** note changes directly on the “Expanding Grants Report” and submit for normal approval process

2) If an employee’s FTE and funds are going to change...
   
   **Action to take:** submit multi-part, paper “Change in Distribution Form”

Additional Block Change Information

If a grant is expected to be continued, the unit needs to contact their Grants & Contracts Officer

Where a grant/contract fund is not extended or established on a timely basis by SPA, the employee(s) will automatically be reassigned to the departmental suspense general fund. SPA will complete the E-Report HR.HR020A, Grant Expanding Report, and forward to Central Processing for reassignment of future actions. SPA will complete the reallocation from the departmental payroll suspense fund to the appropriate fund.
School/College/Division/Departments will need to run an E-Report which compiles the information for employees which have a visa that is to expire.

This report is **HR002A – Visa Expiring**
Lesson Four: Review

In this Lesson you learned about changes in:

- Payroll process changes (Topic 1)
- Web-time-entry (Topic 2)
- Web for employees (Topic 3)
- Benefits (Topic 4)
- Labor Changes & retroactive labor distribution processes (Topic 5)
- Position control and status tracking codes (Topic 6)
- HR forms and conversion from paper based to web based forms (Topic 7)
- Block Changes (Topic 8)
- Expiring visa reporting (Topic 9)
Lesson 5: Technical Changes
Lesson Overview
With the implementation of Banner, associated changes will follow. We’ve gathered a few of these into this lesson for specific discussion.

Lesson Agenda
Topic 1: Web Access
Topic 2: Security
  • Migration of existing HRS users
  • New HRMS users
Topic 3: Discoverer Viewer – reporting tool
Topic 4: WSU campus address
Effective in late March, off-campus access to Banner was made available to WSU student, faculty and staff. Access is provided through WSU’s free dial-in network access service, WayneConnect.

- Only Banner Production and Bantest (banner.wayne.edu and bantest.wayne.edu respectively) are available at this time. BAR and Banner Reports using SMARTi are not accessible via WayneConnect.
- The Banner system is available 8am to 8pm Monday - Friday, and 8am to 2pm Saturdays.
- Access to Banner via cable modems, DSL or MichNet Shared Dial-in connections is not available. C&IT staff are testing several possible solutions for these types of connections. Stay tuned for future announcements.
- Details regarding off-campus access are available at the C&IT Online Help Website (support.wayne.edu). Click the “Banner Version 5” hyperlink.
- Instructions on how to setup a home computer to access WayneConnect are on that same website: click “Staff & Administrators”, and then make a selection under “Remote Access”.
- Employees who have questions or need further assistance and do not have a technical support staff in their offices can contact the C&IT Help Desk at (313)577-4778 (8am-8pm Monday-Friday) or via e-mail to helpdesk@wayne.edu.
- Detailed instructions on setting up a computer for Banner system access are presented in the Appendix of this book, “Banner Web Access”.

Lesson 5: Technical Changes

Topic 1: Off-Campus Web Access to Banner
Topic 2: HRMS Security Permissions

The process for moving existing HRS users, and their corresponding permissions profile will be announced shortly.

An on-line source for security information and access forms is found at:

Security.wayne.edu

click on the “Banner Access Forms” hyperlink to the right side.
Topic 3: Discoverer Viewer & E-Reports

Along with the implementation of HRMS, will come the introduction of a new reporting tool: Oracle Discoverer Viewer. Report writers will use Discoverer Plus. These tools offer great flexibility in creating usable and focused reports.

This list represents the HR reports initially available with HRMS.

<table>
<thead>
<tr>
<th>Report #</th>
<th>Report Name</th>
<th>Report #</th>
<th>Report Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR001A</td>
<td>Cumulative Labor Distribution By Employee</td>
<td>HR012A</td>
<td>Contract End Date</td>
</tr>
<tr>
<td>HR002A</td>
<td>Visa Expiring</td>
<td>HR013A</td>
<td>Change Reason</td>
</tr>
<tr>
<td>HR003A</td>
<td>Payroll Bi-weekly Detail</td>
<td>HR016A</td>
<td>Labor Distribution Changes</td>
</tr>
<tr>
<td>HR004A</td>
<td>Payroll Problem Analysis</td>
<td>HR020A</td>
<td>Grant Expiring</td>
</tr>
<tr>
<td>HR005A</td>
<td>Historical Salary Analysis</td>
<td>HR022A</td>
<td>Cumulative Labor Distribution by Fund/Org/Prog</td>
</tr>
<tr>
<td>HR006A</td>
<td>All Assignments</td>
<td>HR024A</td>
<td>Position Class List</td>
</tr>
<tr>
<td>HR007A</td>
<td>Employee Information</td>
<td>HR.LABELSDDCA</td>
<td>Deans, Directors, Chairs, Admin</td>
</tr>
<tr>
<td>HR008A</td>
<td>Voluntary Faculty Next Review Date</td>
<td>HR.LABELSFTFS</td>
<td>Full Time Faculty and Staff</td>
</tr>
<tr>
<td>HR009A</td>
<td>Classification &amp; Salary List</td>
<td>HR.LABELSGEN</td>
<td>Label Maker - Campus or US Mail</td>
</tr>
<tr>
<td>HR010A</td>
<td>Employee Class List</td>
<td>HR.LABLESPTFS</td>
<td>Full Time Faculty and Staff</td>
</tr>
<tr>
<td>HR011A</td>
<td>Changed Assignment</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
For addressing purposes, the primary campus address, sometimes referred to as the ‘W1’ address, needs to be a true campus address for University communications.
Lesson Five: Review

In this Lesson you learned about changes in:

- Off-campus web access to the Banner system  (Topic 1)
- HRMS security permissions  (Topic 2)
- Discoverer viewer as a reporting tool  (Topic 3)
- WSU campus address  (Topic 4)
Congratulations!

With this foundational information regarding Banner & HRMS, you are better prepared for the next steps in the HRMS training curriculum.

We have also created a “sandbox” practice region of Banner HRMS which will allow you to get an early start on becoming familiar with Banner right away. The Banner V5.x Sandbox is located:

http://bantest.wayne.edu

Feel free to perform whatever functions you wish in there. You cannot harm any data while working in the “sandbox”, so jump in!

Thank you for all your time and effort!

NOTE!
Banner Sandbox username = trainxx
Banner Sandbox password - xx
xx=2 digit number from 51-99
Appendix 1: Banner Web Access

Lesson Overview

A look at the steps needed to enable our internet browser to run Banner 5.x.

Lesson Agenda

Topic 1: System requirements
Topic 2: Oracle browser plug-in -downloading & installation
Topic 3: Making a required setting to properly run Banner 5x
Topic 1: System Requirements

For the latest system specifications, Frequently Asked Questions (FAQ), and other Banner related information, browse to: http://support.wayne.edu

Click the link: “Go to Banner information from here”

NOTE: If you are not sure which Web browser version you are using, click on the Help pull down menu at the top of the browser window and select About...
In addition to having links to the latest system requirements, you’ll find links to:

- Versions of Internet Explorer.
- Specific computer hardware configuration requirements.
- Contact information to Training & Development.
- Banner “Frequently Asked Questions” (FAQ) list.
- Many other sources of relevant and helpful information.
Topic 2: Oracle Browser Plug-in

First thing is to launch Internet Explorer.

In the address field, type the internet address of the WSU Banner Web site:

http://banner.wayne.edu

... and click the “go” button, or hit the enter key.

Helpful hint: to make a shortcut to this location on your desktop, simply click the icon (as highlighted in this illustration) and while still holding the mouse button down, drag the icon out to your windows desktop and release the mouse button.
Topic 2: Oracle Browser Plug-in

With this first visit to the WSU Banner access page, a process will automatically start to download and install a piece of software that will allow your browser to properly run Banner.

NOTE the message each time you launch Banner regarding the Internet Explorer application window needs to be left open.
The “Security Warning” dialog box will appear -- Click on the “Yes” button to proceed with downloading the plug-in file.
Topic 2: Oracle Browser Plug-in

At this point, click the “X” button in the Internet Explorer window. This will **exit** and close this window.

Notice the “InstallShield” dialog box remains on the screen.
Next up will be the confirmation of the installation - click the YES button.
Topic 2: Oracle Browser Plug-in

Click the 'Next' button.

Accept the suggested 'destination directory' by clicking 'Next'.

Appendix 1: Banner Web Access
Topic 2: Oracle Browser Plug-in
Topic 2: Oracle Browser Plug-in

Click the OK button to finish the installation of the plug-in!
There is one more step required to fully prepare the browser to access Banner 5.x.

At your Windows desktop, follow these steps:
1) Click on “Start” button.
2) Click on “Programs” item.
3) Click on “JInitiator Control Panel 1.1.18.14”.

Appendix 1: Banner Web Access
Topic 3: Required Setting Change
In the Oracle JInitiator Properties box:

1) Click on the down-arrow as indicated by the box in the diagram.
2) Click on “Unrestricted” menu item
3) Click on “Apply” button
4) Click on “X” in upper right hand corner to exit this application.

Congratulations! Your computer is now fully prepared to run Banner 5.x!
The End