Welcome to PennWorks Transition Training (1 of 3)

Use buttons to move forward, back or PAUSE the presentation.

Optional: Click icon to print slides

This presentation has no audio
Web Training Tips

Navigation Tabs

- **Outline** and **Thumbnail** show your location in the training
- **Search** allows you to search through the training text

Presentation Controls

- Use buttons to play/pause or move forward or back through presentation

Web-Links

- On-screen links will open a separate browser window

You do not have to complete the course at one sitting; you may stop the PennWorks courses at any time and resume later. When you return, log in again, click **Enrolled** in the left toolbar, find the PennWorks course you would like to resume, and click **Start**. You will have the option to resume where you left off or start from the beginning.

Click the Slide Notes button to remove the slide outline and expand the presentation viewing area.
PennWorks Transition Training

• PennWorks Transition Training is a three (3) module web-based course available from **October 12 – 30, 2009**

• Existing users* must complete PennWorks web training by **5 p.m. on October 30, 2009**, or they will not have access to the new PennWorks application when PennWorks goes live **November 2, 2009**

*Excludes Time Reporting & Salary Mgmt Only user*
Access to PennWorks

• When **PennWorks** is live on **November 2, 2009**, all current users who have completed training, will automatically have access to PennWorks

• Users completing the training after the deadline will have their access reactivated within 2 business days

• Users will access PennWorks via **PennKey** and **Password**

**NOTE**: Users will still need their HR/Payroll (UMIS) **P-numbers for functions that are not yet available in PennWorks (e.g. On Line Time Reporting & Salary Mgmt)**
Learning Objectives

- Ensure HR/Payroll users are prepared for PennWorks
- Introduce HR/Payroll users to PennWorks
- Build knowledge of PennWorks terminology
- Orient users to PennWorks functionality and features

NOTE: PennWorks training is intended for HR/Payroll system users, prior knowledge and understanding of HR/Payroll policies and procedures are presumed. As such, training will focus on the new navigation, look and feel, functionality and features of the PennWorks application.
What is PennWorks?

• A new web-based interface to the current HR/Payroll System
• PennWorks is a multi-phase project which will eventually become the data collection mechanism for all data input into the existing HR/Payroll system
• HR/Payroll will continue to be used as the core payroll processing system
Expected Benefits of PennWorks

• Improved data quality for reporting and analysis
• Flexibility to record unlimited Faculty Administrative, and unpaid roles, exceeding today’s 4-job limitation
• More granular user access levels and enhanced security as SSN will not be displayed via PennWorks
• Immediate assignment of the PennID
• Incorporate the ability to manage ‘projected’ salary distributions and eliminate the need for the Web-Enabled Salary Distribution (WESD) application
• Robust help and online error validation/messages
Expected Benefits of PennWorks (cont’d)

• Reduction of duplicate data entry by leveraging other data
  – If a person has an existing PennID, information will be pulled from Penn Community
  – If a person has an existing record in the Faculty Information System information will be pulled and automatically added to PennWorks
  – Immediate assignment of the PennID
Current PennWorks Release

• Will be used for all actions found in current HR/Payroll system under General Payroll Access:
   – 01 Date Entry & Update
   – 02 Inquiry

• Access to the current HR/Payroll system for data entry & update for these functions will be removed

• Functions remaining in the HR/Payroll system:
   – On-Line Time Reporting
   – Reallocation
   – Salary Management

• Introduction of Faculty Compensation Tab
   – Greater specificity in collecting faculty compensation
# Functions: PennWorks vs. HR/Payroll

<table>
<thead>
<tr>
<th>PennWorks Function</th>
<th>HR/Payroll Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find Person</td>
<td>030 Name Search</td>
</tr>
<tr>
<td>Browse; Update Bio Info</td>
<td>02 Inquiry: 01 Personnel:</td>
</tr>
<tr>
<td></td>
<td>003 Personnel Action Data (Inquire)</td>
</tr>
<tr>
<td></td>
<td>005 Personal Data (Inquire)</td>
</tr>
<tr>
<td></td>
<td>01 Data Entry and Update: 01 Personnel:</td>
</tr>
<tr>
<td></td>
<td>011 Other Personnel Update</td>
</tr>
<tr>
<td></td>
<td>020 Personal Data Update</td>
</tr>
<tr>
<td></td>
<td>012 Data Correction</td>
</tr>
<tr>
<td></td>
<td>003 Personnel Action</td>
</tr>
<tr>
<td></td>
<td>004 Job Assignment</td>
</tr>
<tr>
<td></td>
<td>005 Personal Data</td>
</tr>
<tr>
<td>Terminate</td>
<td>01 Data Entry and Update: 01 Personnel:</td>
</tr>
<tr>
<td></td>
<td>005 Separation / Termination</td>
</tr>
<tr>
<td>LOA</td>
<td>01 Data Entry and Update: 01 Personnel:</td>
</tr>
<tr>
<td></td>
<td>002 LOA with Pay</td>
</tr>
<tr>
<td></td>
<td>003 LOA without Pay</td>
</tr>
<tr>
<td></td>
<td>004 Return from LOA</td>
</tr>
</tbody>
</table>
## Functions: PennWorks vs. HR/Payroll (cont’d)

<table>
<thead>
<tr>
<th>PennWorks Function</th>
<th>HR/Payroll Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Browse; Roles/ Distributions</td>
<td>02 Inquiry: 01 Personnel:</td>
</tr>
<tr>
<td></td>
<td>004 Job Assignment (Inquire)</td>
</tr>
<tr>
<td></td>
<td>01 Data Entry and Update: 01 Personnel:</td>
</tr>
<tr>
<td></td>
<td>007 Job Reclassification</td>
</tr>
<tr>
<td></td>
<td>008 Promotion/Demotion</td>
</tr>
<tr>
<td></td>
<td>009 Job Assignment Update</td>
</tr>
<tr>
<td></td>
<td>013 Reappointment</td>
</tr>
<tr>
<td></td>
<td>016 Salary Increase /Decrease</td>
</tr>
<tr>
<td></td>
<td>017 Job Assignment Add</td>
</tr>
<tr>
<td></td>
<td>018 Job Assignment Delete</td>
</tr>
<tr>
<td></td>
<td>019 Distribution Update</td>
</tr>
<tr>
<td></td>
<td>023 Job Org Transfer</td>
</tr>
<tr>
<td>Add Person</td>
<td>01 Data Entry and Update: 01 Personnel:</td>
</tr>
<tr>
<td></td>
<td>001 Initial Employment</td>
</tr>
<tr>
<td>Rehire</td>
<td>01 Data Entry and Update: 01 Personnel:</td>
</tr>
<tr>
<td></td>
<td>021 Rehire</td>
</tr>
<tr>
<td>Transfer Home ORG</td>
<td>01 Data Entry and Update: 01 Personnel:</td>
</tr>
<tr>
<td></td>
<td>010 Home Org Transfer</td>
</tr>
</tbody>
</table>
New Concept: Role

- **Role** is a new concept that details a person's appointment for a specified timeframe
  - As opposed to **Bio information**, which describes a person's demographics, and **Distributions**, which describe from what sources a person is paid
- **Role** captures the relevant details for all types of personnel relationships, including administrative/professional, faculty, student, support and temporary staff, unionized staff, and non-employees
New Concept: Role (cont’d)

• **Role Description** is the explanation of a specific Job Class Code when there is a one-to-one correspondence of Role to Job Class Code

• Some faculty job class codes can have multiple role descriptions
  
  – For example, Job Class Code 140010 - FACULTY ADMIN APPTMT (A-1) can have the following role descriptions:
    
    • Department Chair, Director of a Center/Institute, Graduate Group Chair, Lab Director
    
    • In this case, a Role with Job Class 140010 is created for each of the Role Descriptions
New Concept: Role (cont’d)

• A person can have more **Roles** than the four job (4) limit allowed in HR/Payroll (UMIS)
• A Role can have more distributions than the eight (8) distribution limit per job in HR/Payroll (UMIS)
• PennWorks background logic will determine how **Roles** and **Distributions** are recorded on the HR/Payroll System to accommodate its 4 job and 32 distribution limits
• See the [PennWorks Glossary](#) for detailed information on Roles and other PennWorks terms and definitions
Key Features of the Role Functionality

- Records are now locked by default so Home Organizations can prevent non-Home payroll ORGs from adding new Roles
- Unpaid Roles may be added if the department so desires
- Roles can be ‘disabled’ as roles change, these historical Roles can be viewed as well in the Data Warehouse
- A Role can be created for each specific type of faculty-held administrative position
- Faculty Administrative Roles can be designated as ‘Interim’
- Certain faculty roles have a free-text title for a Role
Key Features of the Role Functionality (cont’d)

• All full-time faculty should have one role that is their main academic job as approved by the Provost Staff Conference or PSCS

• All CPUP providers must have a role called ‘CPUP Clinical Position’

• Faculty may have secondary academic roles and administrative roles that may be paid or unpaid in addition to staff roles
Key Features of the Role Functionality (cont’d)

• **Types of Faculty Roles**
  – Main Academic Role for full-time faculty
    • e.g. Professor A
  – Secondary Academic Roles
    • e.g. Professor B
  – Staff Roles
    • e.g. Health System Clinician
  – CPUP Clinical Position
    • SOM users should refer to [SOM Guidelines for Faculty Records](#)
  – Faculty Administrative Appointments
    • Faculty Admin Appt (A-1) and CPUP Admin
  – ‘Seasonal’ Roles
    • e.g. Summer Research, Summer Teaching, Evening Teaching
Key Features of the Role Functionality (cont’d)

• Important!
  – For faculty with administrative appointments, create a separate Role for each appointment, listing the Role description (e.g. Grad Group Chair) and the salary and distributions, if any, for that specific appointment
  – Do not lump the administrative pay within another role
What is the Faculty Compensation Tab?

• A new mechanism for Schools to capture salary commitments by component to standing, associated faculty and Health System Clinicians regardless of academic appointment

• Access to Faculty Compensation requires completion of Faculty Compensation training and completed, signed access form

• Faculty Compensation data is separately maintained from Roles at the School level

• Flag to indicate eligibility for performance incentives
What is Faculty Compensation? (cont’d)

• Faculty Compensation provides Schools a mechanism to:
  – Capture current and projected faculty salary commitments by **fiscal year**
  – Review salary commitments to ensure changes are appropriate and in line with agreements made between the School and individual faculty
  – Compare commitments with actual salary

• Data is used by the Provost & Institutional Research for internal reporting and external compensation survey responses
Coordinating Roles & Faculty Compensation

• **When** should Faculty Compensation be updated?
  – During new hire (Add a Person) process
  – For any mid-year promotion, salary increase, or reappointment

• PennWorks users performing these tasks will be prompted to enter/update faculty compensation if they have appropriate Faculty Compensation update access

• PennWorks users who don’t have Faculty Compensation update access will need to coordinate with the appropriate person in their School
Resources for Roles & Faculty Compensation

• Refer to the following documents for detailed information on PennWorks terminology, faculty appointments, and coordinating roles & compensation components:
  – PennWorks Glossary
  – Faculty Handbook
  – Setting Up and Maintaining Faculty Records
    • SOM users should refer to SOM Guidelines for Faculty Records
Introduction to PennWorks

For starters, PennWorks will be leaving the ‘look and feel’ of the 003, 004, & 005 screens behind...

Note: Since the Social Security Number is not stored in PennWorks, you may need to view the 004 screen to look up a Social Security Number
Introduction to PennWorks (cont’d)

...and introducing a new look and feel!

Tabs allow you to navigate between the Bio, Roles/Distributions, and Compensation screens.

All employees have 2 tabs in PennWorks: **Bio** and **Roles/Distributions**. Standing and Associated Faculty, and Health System Clinicians have an additional tab: **Compensation**.
Orientation

• To begin familiarizing users with PennWorks ‘look and feel’, on the following pages you will see a comparison of the current HR/Payroll system with PennWorks
  – Logon with *PennKey* vs. *P Number*
  – Navigation from *Links* vs. *Function Menu*
  – Select Tasks from *drop-down list* vs. *Trans Number*
  – *Mouseover pop-up info* vs. *PF6* for Help
  – *More robust* vs. *limited info* for Error Messages
Orientation - Logon

Logon to PennWorks with your PennKey and Password

Users still need their UMIS P-Number for functions not yet available in PennWorks

PennWorks uses PennKey & Password
Orientation - Navigation

In HR/Payroll, navigate by using a Function Menu

In PennWorks, navigate by using Links
- **Help** is used to access PennWorks Help resources
- **FAQ** displays a list of commonly asked questions
- **Glossary** links to a PennWorks definition dictionary

In PennWorks, navigate using the appropriate links and buttons
In PennWorks, you select from a **Task drop-down list**.

**Note:** The Tasks are dependant upon the employee’s **Status**, i.e. ‘Active’ or ‘Terminated’.

The ‘Last Updated’ icon will display the name of the person who was the last one to change a record.
PennWorks has various levels of Help

- **Screen level Infodot help**
- **Field level mouse-over help**
Orientation – Error Messages

PennWorks displays validation warnings and error messages.

For example, when entering pay information, if there is a difference between the Distribution’s Per Amount and the annual Amount, a Validation Warning appears.

Pop-up validation errors alert you to required data that is missing.
Quiz Instructions

• The following slide will link directly to an on-line quiz
• If you would like to review the material before proceeding to the quiz, use the navigation bar on the left to return to a specific topic or page
• All questions must be answered correctly for successful completion
• You may retake the quiz as needed, however you must *close the current session and start the course again*

Use the navigational controls below when you are ready to proceed to the quiz
SELECT ALL THAT APPLY: What will replace the 003, 004, and 005 screens (from UMIS Payroll) in PennWorks?

- The Roles/Distributions Screen
- The Job Task Screen
- The Home ORG Compensation Screen
- The Bio Screen