Welcome to PennWorks Transition Training (3 of 3)

Optional: Click icon to print slides

Use buttons to move forward, back or PAUSE the presentation

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 Training Tips

This on-line course uses several techniques to present information or demonstrate PennWorks functionality

• Allow each slide to play in its entirety to view all the content

• Blue banners draw your attention to new Penn Works functionality
  
  – Refer to the PennWorks Glossary for further details
PennWorks Training Tips (cont’d)

• Become familiar with these Training conventions:
  – Text bubbles contain information you need to know
  – A **You-Do-It** arrow and gold box/oval indicates an action that simulates functionality in PennWorks
  – A **click here** link on Task pages takes you into a specific PennWorks Task and advances you to the next screen
Tasks & Inbox

• Now that you have seen a glimpse of PennWorks, we will now step through some of the ‘tasks’ you may frequently be performing

• Imagine you have an ‘Inbox’ on your desk. We’ll tackle each item in this inbox one at a time to demonstrate how to complete many of the tasks in PennWorks

• Enjoy!
My Inbox/Outbox

- View Role Details
- Promotion/Demotion
- Reappointment
- Reclassification
- Role ORG Transfer
- Role Update
- Salary Increase/Decrease
- Add/Update External Distribution

Notice we've filed all the paperwork from the Outbox

Click on **View Role Details** to learn how to see Role information
Task: View Role Details

Task Definition: In this task, you will view a person’s ‘role’ information.

In this task – View the same information as you did on the 004 screen
• In PennWorks, once you have completed the ‘Find/Add a Person’ search, you can select the View Role Details from the Roles/Distributions tab

Steps – From the Task drop-down list on the Role Summary page
• Select View Role Details
• View Role information

From the View Role Details, you can also add a role and/or update distributions.

To see this in PennWorks...click here
Task: View Role Details (cont’d)

- From the Roles Summaries drop-down list, select **View Role Details** for the Role desired

Click on **View Role Details** to advance to the next screen
Task: View Role Details (cont’d)

Use the Task drop-down to select the role/action; if the person has multiple roles, all roles will be displayed in Role Summaries.

Click here to advance to the next Task.

Ability to update a given Role is determined by your access rights.
My Inbox/Outbox

- View Role Details
  - Promotion/Demotion
  - Reappointment
  - Reclassification
  - Role ORG Transfer
  - Role Update
  - Salary Increase/Decrease
  - Add/Update External Distribution

Click on Promotion/Demotion to learn how to perform this task
Task Definition: In this task, you either promote or demote an employee.

In this task—Update the same information as you did on the 008 Promotion/Demotion screen
- In PennWorks, once you have completed the ‘Find/Add a Person’ search, you can select the Promotion/Demotion from the Roles/Distribution tab

Steps — From the Task drop-down list:
- Select Promotion/Demotion
- Enter new details as required
  - Including Position Inv. #
- Add/update Distributions accordingly
  - See the Add/Update Distributions task for details

Timing is important! Process distribution changes after the last payroll runs for the old position but before the new position.

To see this in PennWorks...click here
• From the Roles Summaries drop-down list, select Promotion/Demotion
Task: Promotion/Demotion (cont’d)

Enter details as required

Update Distributions as required

Click [Submit] to advance to the next Task
My Inbox/Outbox

- View Role Details
- Promotion/Demotion
- Reappointment
- Reclassification
- Role ORG Transfer
- Role Update
- Salary Increase/Decrease
- Add/Update External Distribution

Click on **Reappointment** to learn how to reappoint Faculty
Task: Reappointment

Task Definition: In this task, you reappoint only a Faculty member.

In this task—Update the same information as you did on the 013 Reappointment screen

• In PennWorks, once you have completed the ‘Find/Add a Person’ search, you can select the Reappointment from the Roles/Distributions tab

Steps – From the Task drop-down list:
• Select Reappointment
• Enter new details as required
• Add/update Distributions accordingly
  • See the Add/Update Distributions task for details

Reminder for all tasks: Be sure to have the appropriate supporting documentation prior to updating payroll information in PennWorks.

To see this in PennWorks...click here
• From the Roles Summaries drop-down list, select **Reappointment**
Task: Reappointment (cont’d)

Payroll Name: ROLEN, HAROLD   Penn ID: 11699395
Home: SCHOOL OF VETERINARY MEDICINE, VET ANIMAL BIOLOGY

### Reappointment

<table>
<thead>
<tr>
<th>Role School/Center*</th>
<th>50 SCHOOL OF VETERINARY MEDICINE</th>
<th>Role ORG*</th>
<th>5802 VET ANIMAL BIOLOGY</th>
</tr>
</thead>
</table>

| Job Class Code*     | 216020                           |
| Role Description*   | AGST PROFESSOR A                 |

| Role State*         | Final                            |
| Start*              | 09/01/2009                       |
| Original Start      | 09/01/2009                       |
| Position Inventory# |                                  |
| Interim             |                                 |
| %FTE                | 100.00                           |
| Term*               | 12 month employee paid over 12 months |
| Annual Amount       | $72,000.00                       |
| Monthly Amount      | $6,000.00                        |

| Job Grade           | Faculty                         |
| Employee Type       | 1. ExemptSalaried               |
| Compa Ratio         | 0.000                           |

Distributions

Show distributions during fiscal year 2010 to ______ Set

Click [Submit] to complete and advance to the next Task

Update Role and Distribution information as required
My Inbox/Outbox

- View Role Details
- Promotion/Demotion
- Reappointment
  - Reclassification
  - Role ORG Transfer
  - Role Update
  - Salary Increase/Decrease
  - Add/Update External Distribution

Click on **Reclassification** to learn how to reclass an employee.
Task: Reclassification

Task Definition: In this task, you will see how to reclassify an employee record.

Steps – From the Task drop-down list:
• Select Reclassification
• Enter new details as required
• Add/update Distributions accordingly
  • See the Add/Update Distributions task for details

In this task – Update the same information as you did in 007 Job Reclassification
• In PennWorks, once you have completed the ‘Find/Add a Person’ search, you can select the Reclassification from the Roles/Distributions tab

Timing is important! Process distribution changes after the last payroll runs for the old position but before the new position.

To see this in PennWorks...click here
From the Roles Summaries drop-down list, select **Reclassification**.
Task: Reclassification (cont’d)

Update Role and Distribution information as required

Payroll Name: MERTON, THOMAS  Penn ID: 33511654
Home: SCHOOL OF MEDICINE, ID: INSTITUTE FOR DIABETES, OBE

Reclassification

<table>
<thead>
<tr>
<th>Role School/Center*</th>
<th>40 SCHOOL OF MEDICINE</th>
<th>Role ORG*</th>
<th>4638 ID-INSTITUTE FOR DIABETES, OBE</th>
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</table>

<table>
<thead>
<tr>
<th>Job Class Code*</th>
<th>130350</th>
<th>(enter job code or title)</th>
<th>Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role Description*</td>
<td>BUS ADMINISTRATOR B</td>
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<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Role State*</th>
<th>Final</th>
<th>Start*</th>
<th>09/01/2009</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Original Start</th>
<th>Class Entry*</th>
<th>Role Title</th>
<th>Business Administrator B</th>
</tr>
</thead>
</table>

<table>
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<tr>
<th>Position Inventory #</th>
<th>17825</th>
<th>TRF Sort Code</th>
<th></th>
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<table>
<thead>
<tr>
<th>Interim</th>
<th></th>
<th>Hours</th>
<th>40.00</th>
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</table>

<table>
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<tr>
<th>WITC</th>
<th>100.00</th>
<th>Annual Amount</th>
<th>$50,000.000</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Term*</th>
<th>12 month employee paid over 12 months</th>
<th>End*</th>
<th>Open-ended</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Monthly Amount</th>
<th>$5,000.000</th>
<th></th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Job Grade</th>
<th>026</th>
<th>Monthly Amount</th>
<th>$5,000.000</th>
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</table>

<table>
<thead>
<tr>
<th>Employee Type</th>
<th>E Exempt: Salaried</th>
<th>Rate Code</th>
<th>Pay Period</th>
</tr>
</thead>
</table>

| Compa Ratio         | 1.198                    | Pay Cycle                  | Monthly Paid |

Distributions

Show distributions during fiscal year 2010 to Set

Add Distribution

Click [Submit] to complete and advance to the next Task
My Inbox/Outbox

- View Role Details
- Promotion/Demotion
- Reappointment
- Reclassification
- Role ORG Transfer
- Role Update
- Salary Increase/Decrease
- Add/Update External Distribution

Click on Role ORG Transfer to learn how to transfer a Role
**Task: Role ORG Transfer**

**Task Definition:** In this task, you can transfer a role to another ORG

**In this task** – Update the same information as you did in **023 Job ORG Transfer**

- In PennWorks, once you have completed the ‘Find/Add a Person’ search, you can select the **Role ORG Transfer** from the **Roles/Distributions** tab

**Steps** – From the Task drop-down list:
- Select **Role ORG Transfer**
- Select the appropriate School/Center from the drop-down list
- Select the appropriate ORG from the drop-down list from the School/Center selected

**F.Y.I.** Just as today, the Role ORG can only manage Role(s) specific to their ORG, whereas the Home ORG can manage all of an employee’s Roles.

To see this in PennWorks...click [here](#)
Task: Role ORG Transfer (cont’d)

- From the Roles Summaries drop-down list, select **Role ORG Transfer**

Click on **Role ORG Transfer** to advance to the next screen.
Task: Role ORG Transfer (cont’d)

Select desired School/Center and/or ORG

Click [Submit] to complete and advance to the next Task
My Inbox/Outbox

Notice a couple more items arrived again! You’re almost there though😊

- View Role Details
- Promotion/Demotion
- Reappointment
- Reclassification
- Role ORG Transfer
  - Role Update
  - Salary Increase/Decrease
  - Add/Update External Distribution

Click on **Role Update** to learn how to update and employee’s role
Task: Role Update

Task Definition: In this task, you are able to update an employee’s role.

In this task – Update the same information as you did in 009 Job Assignment Update
• In PennWorks, once you have completed the ‘Find/Add a Person’ search, you can select the Role Update from the Roles/Distributions tab

Steps – From the Task drop-down list:
• Select Role Update
• Change/update role information as required
• Add/update Distributions accordingly
  • See the Add/Update Distributions task for details

Reminder for all tasks: Be sure to have the appropriate supporting documentation prior to updating payroll information in PennWorks.

To see this in PennWorks...click here
• From the Roles Summaries drop-down list, select **Role Update**
Task: Role Update (cont’d)

Update Role and Distribution information as required

Click [Submit] to complete and advance to the next Task.
My Inbox/Outbox

- View Role Details
- Promotion/Demotion
- Reappointment
- Reclassification
- Role ORG Transfer
- Role Update
  - Salary Increase/Decrease
  - Add/Update External Distribution

Click on **Salary Increase/Decrease** to learn how to adjust a salary
Task Definition: In this task, you either increase or decrease an employee’s salary.

In this task – Update the same information as you did in 016 Salary Increase/Decrease

• In PennWorks, once you have completed the ‘Find/Add a Person’ search, you can select the Salary Increase/Decrease from the Roles/Distributions tab

Steps – From the Task drop-down list:
• Select Salary Increase/Decrease
• Change/update appropriate fields as required
• Add/update Distributions accordingly
  • See the Add/Update Distributions task for details

Fields available for update: Annual Amount, Monthly Amount, End, Distribution fields.

To see this in PennWorks...click here
Task: Salary Increase/Decrease (cont’d)

- From the Roles Summaries drop-down list, select **Salary Increase/Decrease**

Click **Salary Increase/Decrease** to advance to the next screen
**Task: Salary Increase/Decrease**

**Payroll Name:** MERTON, THOMAS I  
**Penn ID:** 33511554  
**Home:** SCHOOL OF MEDICINE, ID-INSTITUTE FOR DIABETES, OBE

### Salary Increase/Decrease

<table>
<thead>
<tr>
<th>Role</th>
<th>40 SCHOOL OF MEDICINE</th>
<th>Role Center</th>
<th>4038 ID-INSTITUTE FOR DIABETES, OBE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Class Code</td>
<td>13090</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Role Description</td>
<td>BLS ADMINISTRATOR B</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Role State</td>
<td>Final</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Original Start</td>
<td>09/01/2009</td>
<td></td>
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<tr>
<td>Position Inventory #</td>
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<td>Interim</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FTE</td>
<td>100.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hours</td>
<td>40.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term</td>
<td>12 month employee paid over 12 months</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Monthly Amount</td>
<td>$5,000,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start</td>
<td>09/01/2009</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Class Entry</td>
<td>09/01/2009</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Role Title</td>
<td>Business Administrator B</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TRF Sort Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Amount</td>
<td>$60,000,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End</td>
<td>Open-ended</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Distributions

- **Job Grade:** 026  
- **Employee Type:** 1 Exempt/Salaried  
- **Comp Ratio:** 1.195  
- **Monthly Amount:** $5,000,000  
- **Rate Code:**  
- **Pay Cycle:**  
- **Pay Period:**  
- **Monthly Paid:**

**Show distributions during fiscal year:** 2010 to [Set]  

**Add Distribution**

<table>
<thead>
<tr>
<th>State</th>
<th>CNAL</th>
<th>ORG</th>
<th>B/L</th>
<th>FUND</th>
<th>OBJ</th>
<th>PGM</th>
<th>CREF</th>
<th>ERN</th>
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<th>Percent</th>
<th>Start</th>
<th>Stop</th>
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<th>Reset</th>
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</thead>
<tbody>
<tr>
<td>Final</td>
<td>400</td>
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<td>1</td>
<td>00000</td>
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<td></td>
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<td></td>
</tr>
</tbody>
</table>

**Click [Submit] to complete and advance to the next Task**
My Inbox/Outbox

- View Role Details
- Promotion/Demotion
- Reappointment
- Reclassification
- Role ORG Transfer
- Role Update
- Salary Increase/Decrease
  - Add/Update Ext Distribution

Click on **Add/Update Ext Distribution** to learn how to do this
Task Definition: This task represents payment to an employee from a source other than University of Pennsylvania Payroll. This payment offsets Penn's compensation commitment.

In this task – You can add payments from external sources
• In PennWorks, once you have completed the ‘Find/Add a Person’ search, you can select the Add/Update Ext Distributions from the Roles/Distributions tab

Steps – From the Task drop-down list:
• Select Add/Update Ext Distributions
• Add/update Distributions as required

This functionality currently is only used with School of Medicine and Dental Medicine faculty and is for information only.

To see this in PennWorks...click here
• From the Roles Summaries drop-down list, select **Add/Update Ext Distributions**

Click **Add/Update Ext Distributions** to advance to the next screen.
Task: Add/Update Ext Distributions

Add or update External Distributions as required

Click [Submit] to complete and advance to the next Task
My Inbox/Outbox

- View Role Details
- Promotion/Demotion
- Reappointment
- Reclassification
- Role ORG Transfer
- Role Update
- Salary Increase/Decrease
- Add/Update External Distribution

We have one last item in the Inbox. Can you guess what task it is?

Click on last Inbox item to learn how to go to final Task
Task: Rehire

Task Definition: In this task, you can rehire a ‘terminated or separated’ employee.

In this task – Update the same information as you did in 021 Rehire
• In PennWorks, once you have completed the ‘Find/Add a Person’ search, you can Rehire a ‘Terminated or Separated’ employee

Steps – From the Task drop-down list:
• Select Rehire
• Enter the Birth Date of the employee to be rehired
• From the Biographical Information, begin to update the employee with the appropriate information
• Add a Role as appropriate
• Add Distributions as appropriate
• Add Ethnicity
• Review and Submit

Be sure to adhere to I-9 requirements for this rehired employee.

To see this in PennWorks...click here
From the Task drop-down list, select **Rehire** to begin the rehire process.
From this point onward, a rehire follows the same process and screen flow as a New Hire. Refer to the Add a Person Task to review this process.

Enter the Birth Date of the person to be rehired and click [Submit] to begin entering Bio and Role/Distribution data.

After completing the Rehire entry screens, click [Submit] complete the Task and advance to the next screen.
My Inbox/Outbox

- View Role Details
- Promotion/Demotion
- Reappointment
- Reclassification
- Role ORG Transfer
- Role Update
- Salary Increase/Decrease
- Add/Update External Distribution
- Rehire

Click on ‘You did it!’ to advance to the next slide
Function Definition:  The Notifications function allows you, based on access rights, to view, filter, and sort actions taken in PennWorks.

Steps – From the Notifications screen:
• Enter search criteria
  • e.g. Name or Penn ID #
• Review the results
• Export to Excel if necessary

With this function – View Notifications replaces the ‘Last Action’ that was displayed on the 003 screen. Use a variety of search criteria to view actions taken in PennWorks:
• Search by a date range
• Search by ORG
• Search by name or Penn ID #
• Search by Action Type

The default view is a date ordered view of actions. Notifications roll-off after 30 days.

To see this in PennWorks…click here
Function: Notifications (cont’d)

HR/Payroll

---INFORMATIONAL DATA---
LAST ACTIONS: 11  LAST ACTN DATE: 12/23/99  MINIMUM RCRD: OK
CROSS-REF ID:  LAST PAY PROCESS: 08/09/98  PRIOR DATE: 08/02/98

PennWorks

To begin, select View Notifications

Enter your search criteria

Clicking on [Execute Report] completes the search

View Notification(s)

Export as xls to complete and advance to the next screen
Improved Reporting Capability

• PennWorks information will be added to the Salary Management collection in the Data Warehouse
• Provides information in addition to that currently available in HR/Payroll system
• Improves data quality for reporting and analysis
• Access to PennWorks data automatically granted to existing users of the Salary Management collection
  – Individuals requesting access to the collection should use the access form available at
To Learn More About the PennWorks Project

- E-mail to pennworks@lists.upenn.edu
- Visit the PennWorks project page at http://www.upenn.edu/computing/isc/apps/pennworks/
On-Going Support

• If you want to Review PennWorks and/or Faculty Compensation training material after training is completed, go to the Financial Training Department web site:
  
  http://www.finance.upenn.edu/ftd/documentation.shtml

• Need Help?
  – Dial 6-HELP (6-4357 or 215/746-4357)
  – Enter your two-digit School or Center code
  – Help is available 9:00 a.m. to 5:00 p.m. Monday through Friday
PennWorks Readiness Checklist

• Complete all applicable PennWorks training by **5:00 p.m. on Friday, October 30, 2009**
  – Users of the Faculty Compensation Tab must also submit a completed and signed access form

• Ensure your desktop has a Penn-supported web browser and is configured to allow pop-ups
  – Additional information can be found at [Supported Computing Products](#)
  – For best results is it recommended that you NOT use IE6
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
FILL IN THE BLANK: Access to PennWorks data will automatically be granted existing users of which Data Warehouse collection?

PROPERTIES
On passing, 'Finish' button: Close Window
On failing, 'Finish' button: Goes to Previous Slide
Allow user to leave quiz: After user has completed quiz
User may view slides after quiz: At any time
User may attempt quiz: Unlimited times