

# **Background Information For Colts II Payroll Representatives**

The intent of this document is to cover some of the background and support aspects of the payroll representative's role in COLTS II.

We begin with an overview of the various methods of time collection and the decisions and actions which must take place before employees can use the COLTS II system. Following that are with some comments and suggestions on training your units and where you and the employees and supervisors in your unit can find help using COLTS II.

## **TIME COLLECTION OPTIONS – WHY WE NEED COLTS II**

Current time collection at Cornell is a complicated picture. Some employees in some units use timeclocks (these are mostly, but not all, union members). Several different timeclock systems are in place. Some of these require manual transcription of time data to vouchers while others feed information electronically to the Payroll office. The remaining non-exempt employees are currently using either paper timecards or the original COLTS system. COLTS I was always intended to be an interim measure, to validate the notion of an on-line replacement for paper timecards.

The picture will be simplified when the PeopleSoft HR/Payroll system is put into place. All timeclock users will switch to a single timeclock system, provided by Kronos. The data from this system will be delivered electronically to the new PeopleSoft system, eliminating multiple transcriptions and hand-offs. Paper timecards and COLTS I will both be replaced by the COLTS II system, which has been designed specifically to work with PeopleSoft.

Both of these changes are intended to streamline the time collection process as much as possible and to reduce the number of points in the process where errors in data entry or transcription might occur. The COLTS II system will be more accurate, easier to use, and quicker to process than our existing systems:

- Time is entered only once, with the system capable of making the calculations involving hours and tenths of hours.
- After the employee enters and approves his or her hours, there are only two levels of review and approval (supervisor and payroll representative); the current final review by the voucher approver will no longer be required.
- There will not be any transcription or re-entry of data. The Kronos and COLTS II systems will feed directly into the payroll process in PeopleSoft.
- All information is available to all parties (the employee, the supervisor, and the payroll rep) at all times, with no delays caused by sending a paper form from one person to another.

## **BEHIND THE SCENES / BEFORE GOING LIVE**

In order for the employees in a unit to use COLTS II, decisions must be made about (1) which of the time-entry options are going to be used, (2) what physical arrangements will be made for time-entry, and (3) who will be responsible for entering special earnings codes.

1. When each employee uses COLTS II they will be presented with one of three ways of entering their work time. The decision about how the employees will enter their time will be made within individual units, and will be entered into COLTS by the payroll representative or by an employee's supervisor. When an employee logs onto the system, they will see only the screens they need for that method; employees will not be able to make this choice themselves.

The three time collection methods are:

- Standard Schedule - the employee will find their normal number of hours worked already filled in for each day. This would be appropriate for "committed" employees; the PeopleSoft term is "exception hourly". The employee will only change the entry for a particular day if they did not work their regular hours. On such occasions they will simply enter the number of hours they worked, not the actual "clock" hours. This option will require the least input from the employee.

- Non-standard Schedule - employees will enter the total number of hours they worked each day without specifying which particular “clock” hours they were, or when they took their breaks.
  - Require Entry of In/Out Time - this is nearly identical to the paper time card system. Employees will enter up to six pairs of “In/Out” times for each day worked. The system will compute the time worked based on these entries. This option will provide the most detailed information about an employee’s activities.
2. In terms of physical arrangements, units need to decide who will do the actual input and on what equipment. In some offices, each employee will use COLTS II on his or her own desktop computer. In other offices, a centrally-located and accessible computer will need to be made available where a group of employees can use it to enter their information. As a temporary measure, or to meet the needs of employees in unusual circumstances, unit payroll representatives may choose to print off blank timecards for the employees to fill out manually. The actual data entry will need to be done by someone within the unit, as there will be no centralized data entry. If a unit chooses to use paper timecards, they will also be responsible for retaining and storing those cards.
3. COLTS II allows users to specify whether the hours being reported are regular work hours, or whether they fall into special categories such as holiday pay, emergency callback, etc. A decision will need to be made within each unit whether the employees will be responsible for understanding the details of these business rules and using these codes, or whether the employees should simply enter their hours and notify their supervisor or payroll rep about special circumstances, leaving it to the supervisor or payroll rep to assign the correct codes.

In addition to these three unit decisions, three pre-conditions are necessary for an employee to use COLTS II:

- First, the person must be entered into the PeopleSoft HR/Payroll system as an active employee. (Information on all current Cornell employees is being transferred electronically into the new PeopleSoft system, so this will not require massive manual data entry.) It will not be possible to “enter” an employee directly into COLTS II. New employees will be entered into the PeopleSoft system by the central Records staff,

based on information they receive from the units via the University Personnel Action Form (UPAF).

- Second, the employee must have a valid NetID and password. New employees will receive a NetID as part of the hire process; it will no longer be necessary for the employee to request one.
- Third, the payroll representative in the unit must have defined the approval structure for the unit, that is, which employees have their time reviewed and approved by which supervisors. Users of the COLTS I system will not be able to transfer this information to the new system, so the supervisory relationships will need to be set up in COLTS II.

## ACCESSING & NAVIGATING COLTS II

COLTS II is entered through Bear Access 98. Bear Access provides two important background features. First, it provides security based on a person's NetID and password, which must be entered in order to access COLTS II. Second, it automatically provides "version control" which will distribute the most up-to-date version of the program files whenever a new version is released, without requiring any action on the part of the user.

The main section of the COLTS II window is where all entries and editing takes place. The contents of this section depend on (1) which option under the "Function" menu has been selected and (2) which tab has been selected in the blue section at the left side of the COLTS II window, which is called the **Selector Bar**. The Selector Bar will display one or more tabs. Each tab displays a list of items: pay periods, employees' names, pay groups, etc. (see figure 1). After selecting a tab, you will select an item from the list. In figure 1, under the **Job** tab, you see pay periods. Within each pay period, the pay rep groups are listed. Under each pay rep group, the employees are listed. If an employee uses COLTS II to report time for more than one job, each job will be listed under his or her name. You will need to select an item at the most detailed level listed. In this example, if an employee has only one job, you

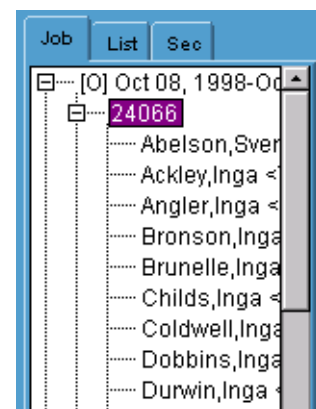


Figure 1

would select his or her name; if an employee has more than one job, you would select one of the job titles listed under his or her name.

If there is a plus sign next to an item in the Selector Bar, it means there is another level of detail. The next level of detail can be displayed by clicking on the plus sign; the plus sign will change to a minus sign. The detail for any item can be hidden by clicking on its minus sign.

## **SUGGESTIONS FOR TRAINING EMPLOYEES & SUPERVISORS**

The training of employees and supervisors within a unit is the responsibility of the payroll representatives and other trainers who have attended training provided by Project 2000. Each unit's implementation team has identified a lead person who is charged with ensuring planning, training, and implementation of the COLTS II system. Once the decision has been made within a unit as to how employees will enter their time (Standard Schedule, Non-standard Schedule, or In/Out), only the steps necessary for that method need to be communicated to the employees. If your unit is using more than one of these methods (for different employee groups) we strongly recommend that you provide separate training for each group and not make all employees sit through all three methods.

We suggest that the training you provide to employees be kept brief and focused on day-to-day use. For the most part, employees will use COLTS II in a very simple way. When the situation arises that they need to use a more complicated function, such as prior period correction, they will have a variety of resources available to them, such as step-by-step instruction sheets, on-line help, the web site, and their payroll rep. We suggest that you do not try to train the employees on every aspect of COLTS II that they will ever encounter. Instead, give them the tools they need to get started, and pass along additional information as it becomes useful.

Supervisors will need to be trained on how their employees use COLTS II and on how to review and approve employee hours.

We believe that hands-on classroom training is not necessary for your supervisors or employees. Instead, we recommend the following steps:

1. Have all employees and supervisors go through the Guided Tour on the COLTS II web-site.
2. Schedule all employees for a training session where the payroll rep or trainer demonstrates, step-by-step, the time-entry method which will be used. Separate sessions should be held for employees using the In/Out method and those using either Standard and Non-standard Schedule. Do not show employees using one method how to use the other methods. Supervisors whose employees all use the same time-entry method should also attend the appropriate session. The step-by-step instruction sheets and resource guides should be handed out at this time.
3. Supervisors whose employees use more than one time-entry method should be scheduled for a demonstration of all three methods, plus the steps involved in reviewing and approving employee entries. The step-by-step instruction sheets and resource guides should be handed out at this time.
4. When the "practice environment" is distributed across campus via Bear Access (late November/early December 98), all employees and supervisors should be encouraged to log on and familiarize themselves with the system. Before they can do this, the payroll rep will need to set up the employee-supervisor relationships within their units, so this will need to be accomplished as quickly as possible.

## **WHERE TO GO FOR HELP**

Given the large number of employees and supervisors who will be using COLTS II, we expect a need for comprehensive support, especially in the first few pay periods. We plan to provide that help through a number of methods, rather than try to staff a traditional "help desk".

- **Step-by-step handouts for employees:**
  - #101 Time-entry Using Standard Schedule
  - #102 Time-entry Using Non-standard Schedule
  - #103 Time-entry Using In/Out
  - #104 Using the In/Out Calculator

- #105 Entering Leave Time
- #106 Approving your Time Entries
- #107 Checking Leave Balances
- #108 Making Prior Period Corrections
- #109 Entering Shift Time
  
- **Step-by-step handouts for supervisors:**
  - #201 Approving Employee Reported Hours
  - #202 Changing Time-entry Method for Employees
  
- **Step-by-step handouts for payroll reps:**
  - #301 Approving Employee Reported Hours
  - #302 Changing Time-entry Method for Employees
  - #303 Changing Labor Distribution
  - #304 Creating and Modifying Security Trees
  
- On-line help, accessible from COLTS II gives descriptions and definitions of all fields, panels, tabs, and terminology as well as a quick list of "How Do I..." steps to accomplish the basic tasks in COLTS II.
  
- The COLTS II Web site, which includes all of the areas listed under On-line help, and adds a Guided Tour of employee procedures, the ability to retrieve all printed help and training materials, and the FAQ (Frequently Asked Questions). The web address is **<http://colts2.cornell.edu>**

We are asking that employees and supervisors go to their payroll representative for additional help if these resources do not provide the help they need. The student Help Desk will not be providing direct support for COLTS II.

The unit payroll reps, in addition to the resources listed above, have access to a payroll help-line phone number. Given the large user base, we ask that payroll reps first check these resources, especially the FAQ on the web site, before using the help-line. The payroll help-line number was distributed in the training classes provided in November 1998.

Use of the payroll help-line will be restricted to unit payroll reps. This number should not be published or shared with the employees and supervisors using COLTS II.