Navigating the Way to Improved Payroll-Finance Connections Through HR Digitization

2019 FINANCIAL FORUM: ROADMAP TO THE FUTURE

Nov 14, 2019

BRIGHTER WORLD | mcmaster.ca

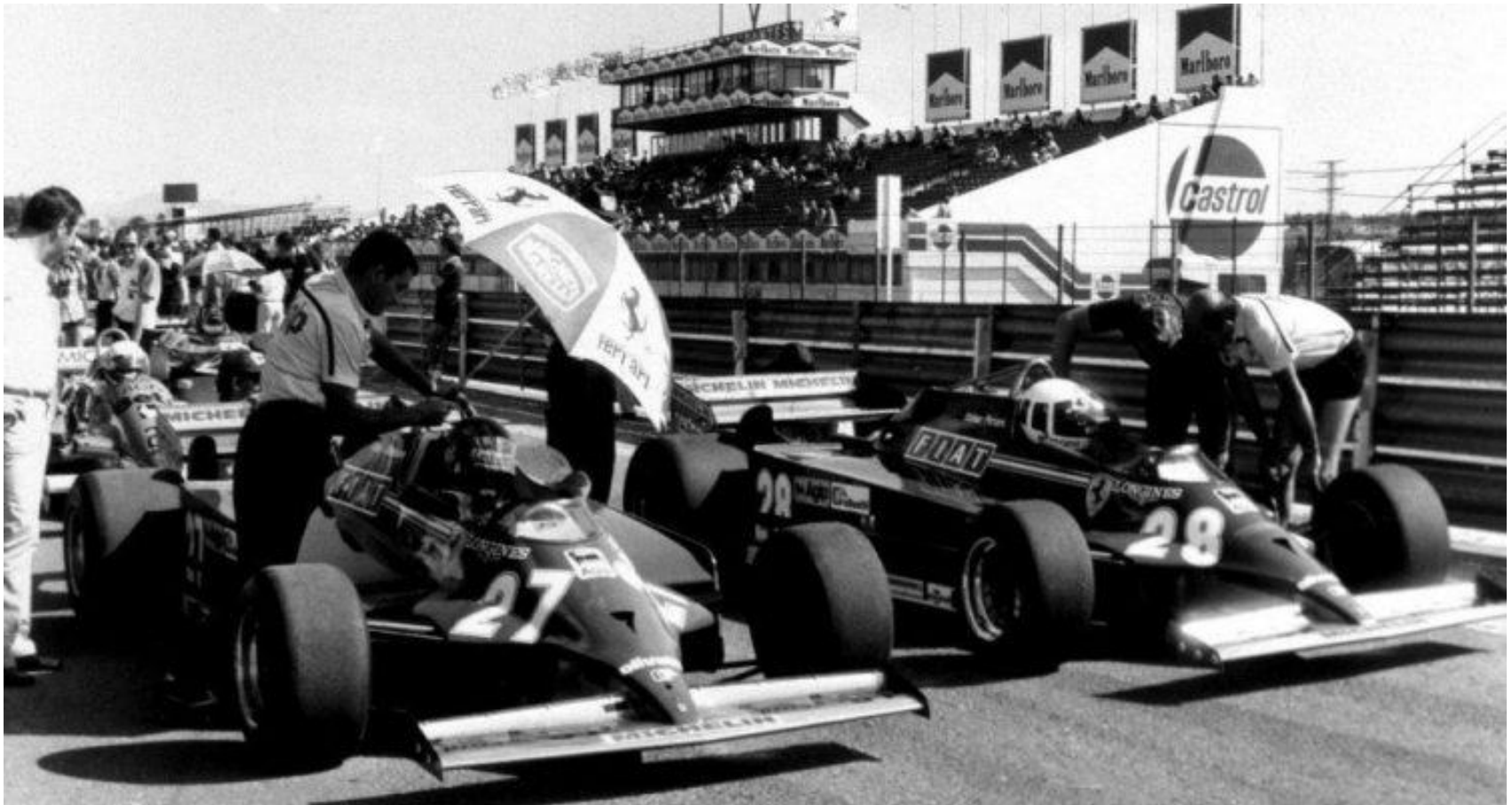McMaster University

Trip Itinerary
Navigating the Way

- Looking back down Memory Lane:
  - Reminder of key concepts
  - Improved tools and reports
    - Administrative Home page
      - Tasks & Reporting Hubs
    - HR-Payroll chartfield data
    - Labour Distribution & Salary Commitments
- Looking ahead to the Future:
  - HR Digitization Project
    - Position Management review
    - HR Event Form and chartfield updates
  - Continuous improvement on the road ahead
  - Time for your feedback

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Looking back down Memory Lane

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Keys to reading the financial map in Mosaic HR-Payroll

A reminder of key concepts

- Terminology:
  - Position
    - Concept of an empty chair, with key attributes such as:
      - Job details, job title and employee group
      - A department, location and supervisor
    - An employee gains those attributes, if they fill that chair (i.e.: the position)
    - If an employee leaves, the next employee who fills the position gets the same attributes
    - A position does not lose context in the organization, even if empty
    - Positions attributes can evolve over time
    - Positions can have one (1:1) or multiple incumbents (multi-incumbent)
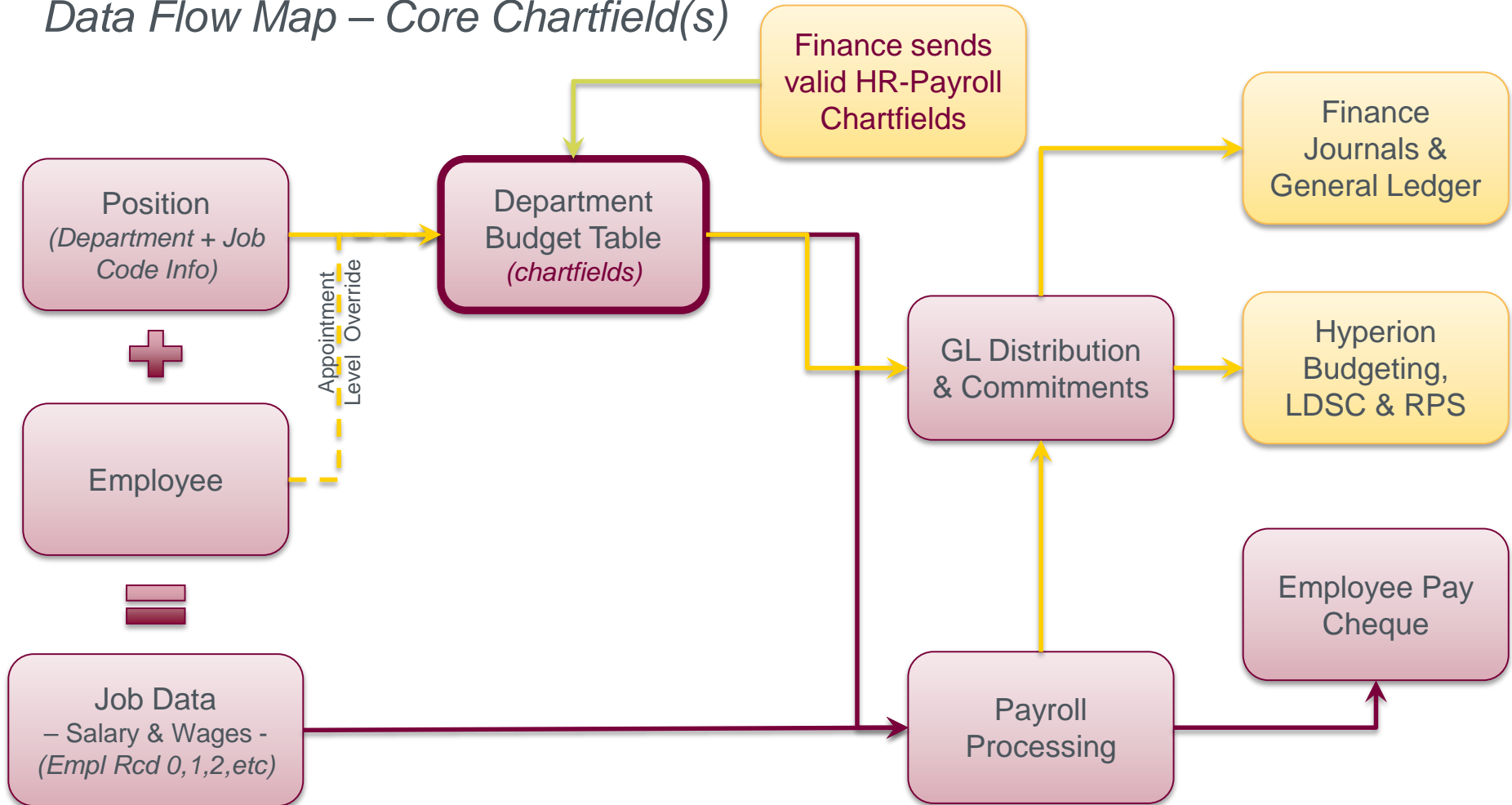
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Keys to reading the financial map in Mosaic HR-Payroll

A reminder of key concepts

- Terminology:
  - Chartfield string (aka combination or combo code):
    - Directs employee labor and fringe costs and has 5 identifying components:
    - Fund + Account + Department + Identifier (PG/PJ) +Program/Project
      - Example: 20 + 540001 + 10208 + PG + 30000

        = 2054000110208PG30000
  - Department:
    - Same 5-digit code has two different uses in HR-Payroll:
      - **Chartfield string** - The department code where the costs are charged
      - **Position** - The department code where the employee works
        - *The department codes can be the same or can be different between chartfield and position*
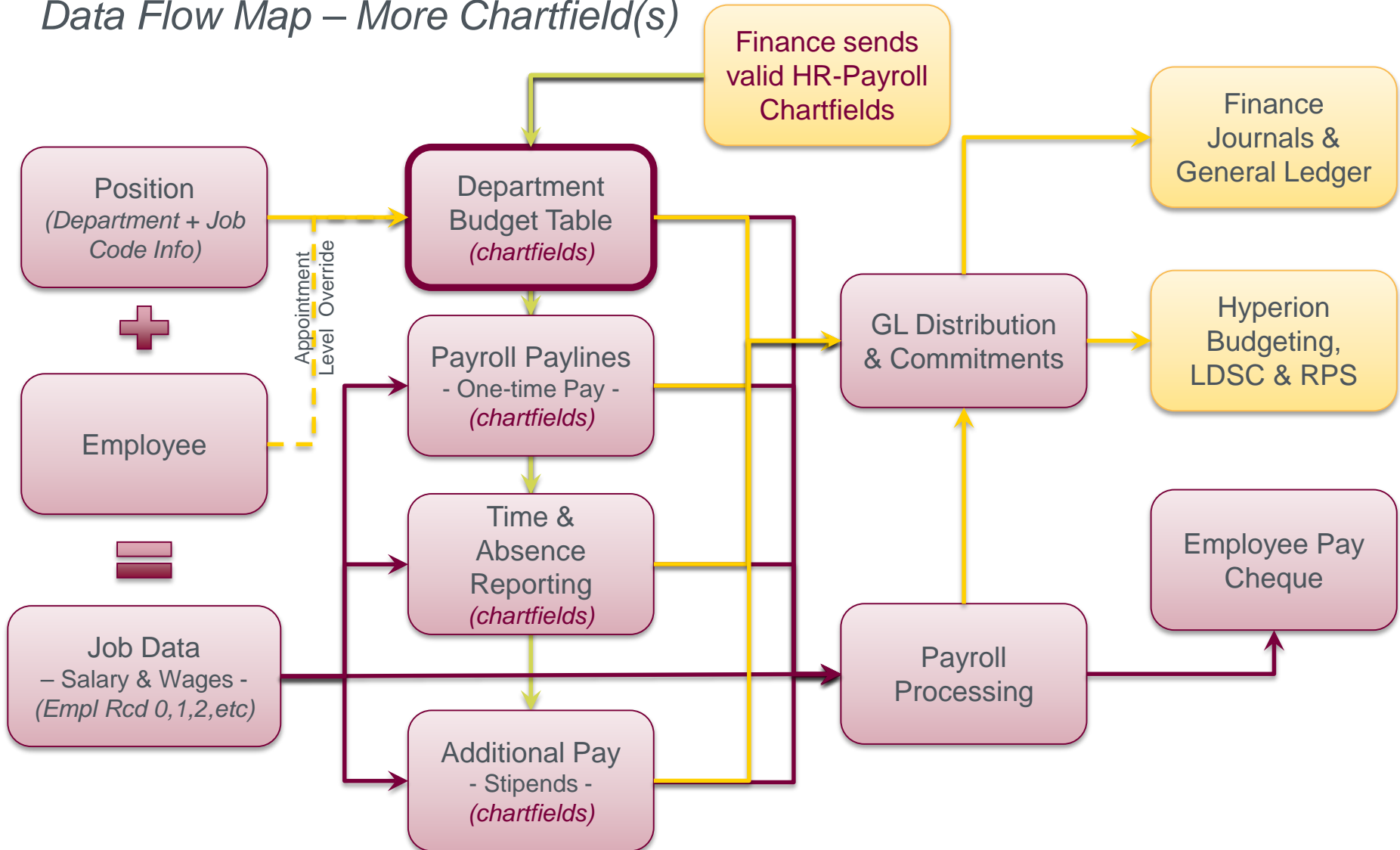
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Keys to reading the financial map in Mosaic HR-Payroll

Data Flow Map – Core Chartfield(s)

Finance sends valid HR-Payroll Chartfields

Position *(Department + Job Code Info)*

Appointment Level Override

Employee

Job Data – Salary & Wages - *(Empl Rcd 0,1,2,etc)*

Department Budget Table *(chartfields)*

Finance Journals & General Ledger

GL Distribution & Commitments

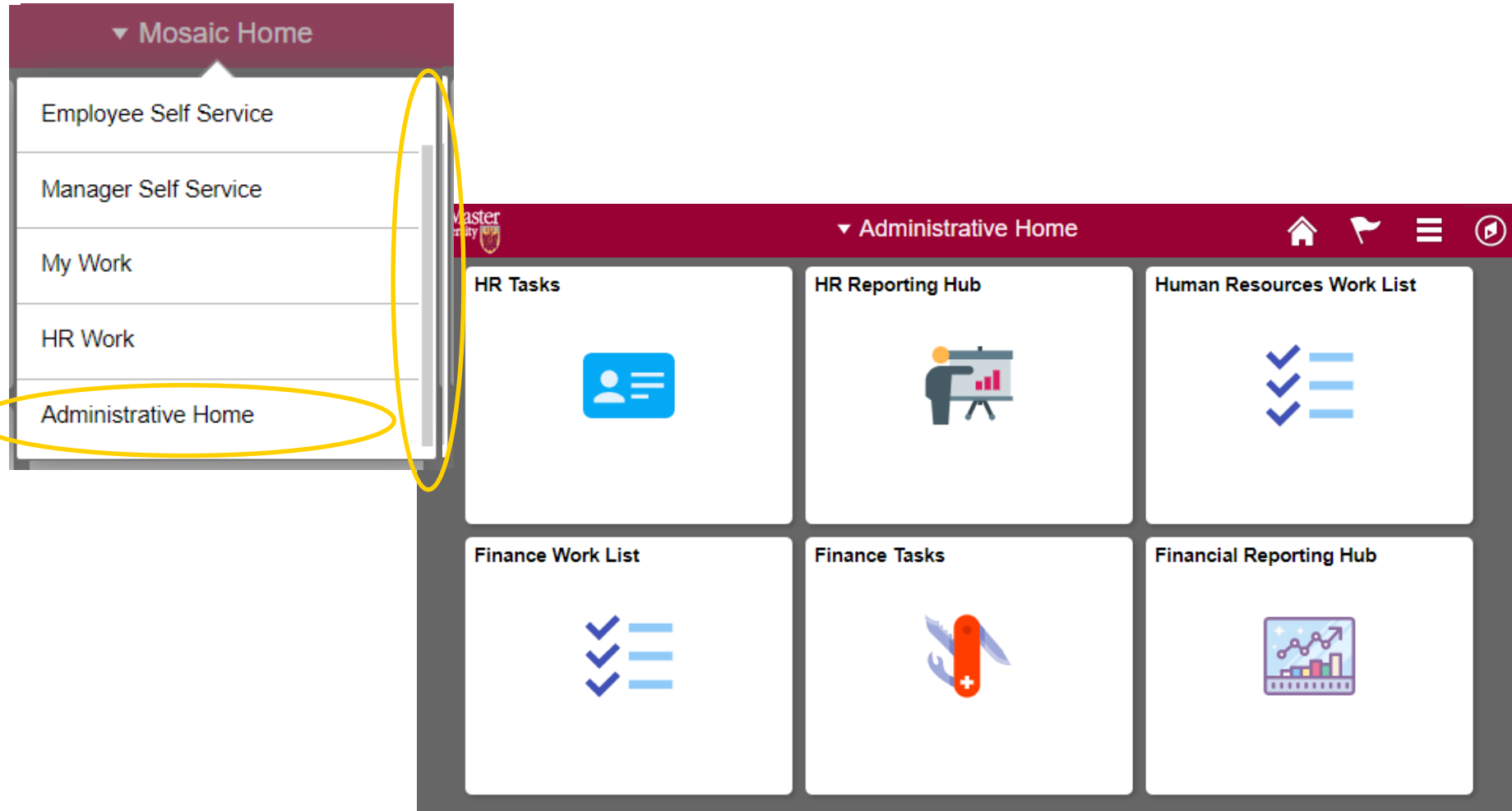Hyperion Budgeting, LDSC & RPS

Payroll Processing

Employee Pay Cheque

Keys to reading the financial map in Mosaic HR-Payroll

Data Flow Map – More Chartfield(s)

Easier Navigation in Mosaic - The "Administrative Home" page

This is the "Google Maps" of HR and Finance (*Campus too*)

Keys to reading the financial map in Mosaic HR-Payroll

A reminder of key concepts, plus something brand new!

- Active chartfield strings in HR-Payroll:
  - Chartfield string is made active in the Finance module for HR use then feeds to HR module.
    - To request email finserv@mcmaster.ca
      - Overnight Feed to HR module.
- **New Feature**: Look-up active chartfield strings via: *HR Tasks Tile > Combination Code Table:*
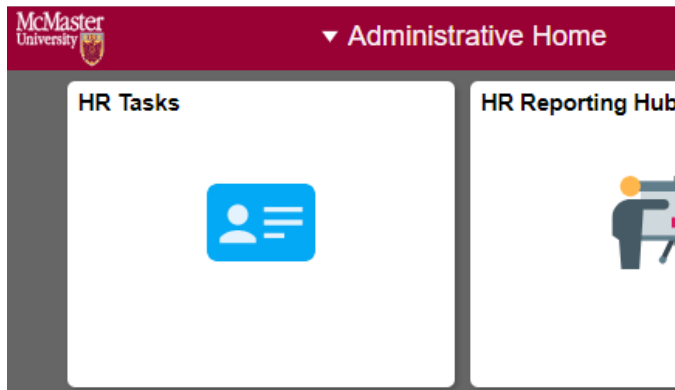
Keys to reading the financial map in Mosaic HR-Payroll

Central Concept: the DBT

- **Department Budget Table CAN**
  - o Access via: *HR Tasks*
- Hierarchy of DBT
  - o Department – suspense (541051)
  - o Department – default (541099 "invalid")
  - o **Position – core level**
  - o Appointment – employee override
- DBT Combo Entry Tabs:
  - o Earnings - Required
  - o Deductions & Taxes (Fringe)- Optional
  - o *Labor-Benefit Acct Map*

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Keys to reading the financial map in Mosaic HR-Payroll

Labor-Benefit Account Mapping

- **Current Labor-Benefits Acct Map**

  - Access via: *HR Tasks or HR Reporting Hub*

  - Earnings account code will automatically map Deductions and Taxes to the corresponding benefits (i.e.: fringe) account code
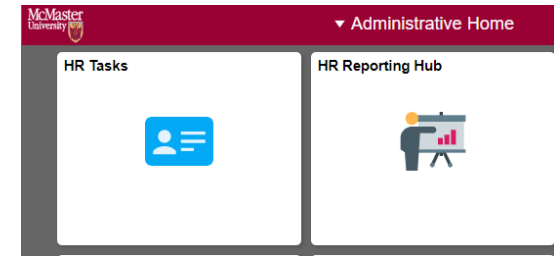   - E.g.: Labor Acct 540001 maps to Ben Acct 550001
  - Note: DBT Deductions and Taxes tabs will display the Earnings combo code (i.e.: the Labor Acct) when standard mapping in effect

- Normally do not need to enter a Deduction or Taxes combo code (e.g.: on DBT) unless you require a non-standard fringe account code *(not a recommended practice)*

  - E.g.: You need Labor Acct 540001 but want a different Ben Acct not 550001

  - Fringe overrides can be set-up only on the DBT (not available for Additional Pay, Timesheet or Payline entries), *which is why not recommended*

MCM_CA_LABOR_BEN_GL_MAPPING - Current Labor-Benefit Acct Map

Sal Acct - Leave blank for All [0]
Ben Acct - Leave blank for All [0]

[View Results]

Download results in : Excel SpreadSheet CSV Text File XML File (11 kb)

View All

	Set ID	Eff Date	LBR Account	BEN Account
23	SHARE	01/01/2001	500001	510001
24	SHARE	01/01/2001	500002	510002
25	SHARE	01/01/2001	500005	511010
26	SHARE	01/01/2001	500007	500007
27	SHARE	01/01/2001	500111	510001
28	SHARE	01/01/2001	500121	510121
29	SHARE	01/01/2001	500131	510131
30	SHARE	01/01/2001	500141	510141
31	SHARE	01/01/2001	501001	511009
32	SHARE	01/01/2001	501002	511010
33	SHARE	01/01/2001	501003	511009
34	SHARE	01/01/2001	501004	511001
35	SHARE	01/01/2001	501005	511002
36	SHARE	01/01/2001	501006	511004
37	SHARE	01/01/2001	501007	511003
38	SHARE	01/01/2001	501008	511005
39	SHARE	01/01/2001	501009	511006
40	SHARE	01/01/2001	501010	511008
41	SHARE	01/01/2001	501011	511007
42	SHARE	01/01/2001	501012	511011
43	SHARE	01/01/2001	501013	511010
44	SHARE	01/01/2001	501014	511010
45	SHARE	01/01/2001	501015	511009
46	SHARE	01/01/2001	501016	511009
47	SHARE	01/01/2001	511001	511001
48	SHARE	01/01/2001	522001	532001
49	SHARE	01/01/2001	522002	532002
50	SHARE	01/01/2001	522011	532011
51	SHARE	01/01/2001	540001	550001

(Navigation menu shown: Administrative Home, Time and Absence Management, Employee and Pay Info, Recruitment, Dept Budget and Combo Codes — Department Budget Table CAN, Combination Code Table, Current Labor-Benefit Acct Map)

(HR Tasks tile and HR Reporting Hub tile shown under Administrative Home)

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Keys to reading the financial map in Mosaic HR-Payroll

Commonly used salary and benefit accounts by employee group

Salary/Benefit Account Usage		Salary	Benefit
Academic - Tenure, Tenure/Track		500001	510001
Academic - CLA		500121	510121
Academic - Permanent Teaching Track		500131	510131
Academic - CAWAR (usually just in FHS)		500141	510141
Academic - Stipend (admin stipend for being Dean, Chair, Director, etc)		500111	510001
Academic - Academic FHS Stipend (only used in Faculty of Health Sciences)		500002	510002
Academic - Part Time Academic		501001	511009
Academic - Overload Teaching or Non-CUPE appointments (part time)		501001	511009
Academic - Honoraria Academic Part Time		501002	501002
Academic - Sessional Faculty/Lecturers (CUPE)		501012	511011
Academic - Faculty Supervision		501013	511010
Academic - Post Doctoral Fellow		501007	511003
Academic - TA		522001	532001
Academic - TA - overtime, part time & non-McMaster		522002	532002
Academic - TA - Undergraduate		522011	532011
Support - Unifor (Unit 1), TMG, Librarians		540001	550001
Support - Interim (support part time) (*Note)		541001	551001
Support - McWork/Work Study Student (** Note)		541008	551008
Support - overtime		541010	551010
Support - Honoraria Non-Academic Part Time		541002	541002
Support - Hourly Staff Wages (Unifor Unit 3 & 4 - Security & Parking)		570001	571001
Support - Hourly Staff Wages (SEIU, IUOE - Hospitality & Facility Services)		570001	571001

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Keys to reading the financial map in Mosaic HR-Payroll

Commonly used salary and benefit accounts by employee group

Salary/Benefit Account Usage			Salary		Benefit
Within RESEARCH PROJECTS ONLY (Fund Code 50, 55, 80, 85):					
Masters Student - Cdn			501005		511002
Masters Student - Foreign			501009		511006
Undergrad Student - Cdn			501004		511001
Undergrad Student - Foreign			501008		511005
PhD Student - Cdn			501006		511004
PhD Student - Foreign			501010		511008
Post Doc Student - Foreign			501011		511007
Research - Academic Salary Other			500007		510007
Salary Recovery Accounts (should never be used in Mosaic HR):					
Academic Full Time Recovery			500801		510801
Academic Full Time Recovery - NSERC			500802		510801
Academic Full Time Recovery - CRC			500822		510817
Support Full Time Recovery			540801		550801
Support Part Time Recovery			541801		550854
*Note - there are additional part time support accounts if needed					
** Note - 541008 is NOT used in Research projects or any Facility Services departments					
Should only be used for APPROVED McWork/Work Study students					

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Keys to reading the financial map in Mosaic HR-Payroll

Importance of using the correct accounts

- Why is it important to use the correct salary and benefit accounts?
  - Provides for accurate university analysis and reporting
  - Provides for accurate external reporting of these costs
  - Creates a better management tool for senior management and end users
  - Provides for accurate calculation of FTE (Full Time Equivalent) counts
  - Efficiencies (less journal entries)

- FTE counts:
  - Incorrect use of compensation accounts will cause inaccuracies in calculating FTE
  - FTEs are one of the main drivers used in the new Budget Model

Research projects require more specific salary and benefit accounts (eg: Cdn vs Foreign) for their reporting needs to external funding agencies. Operating/Ancillary and other Funds do not require this level of detail and will not use as many accounts.

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Keys to reading the financial map in Mosaic HR-Payroll

HR Reporting Hub – One stop, up to 50+ reports *(based on your security)*
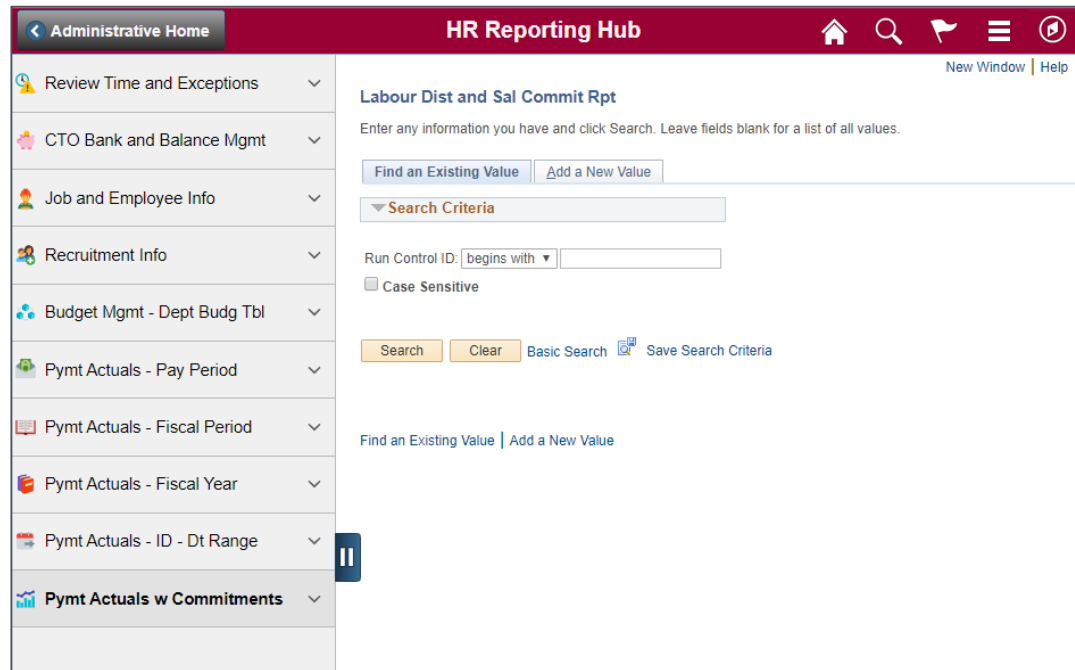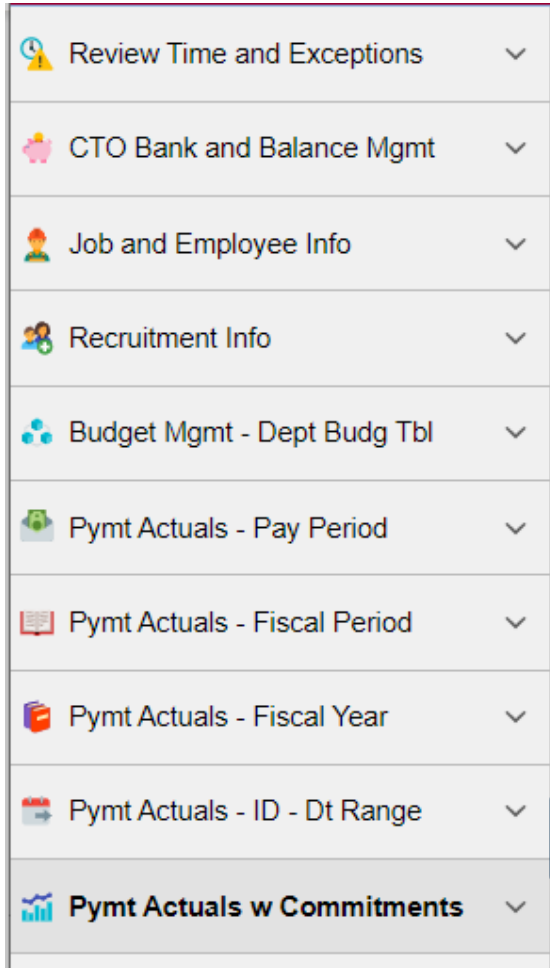
Keys to reading the financial map in Mosaic HR-Payroll

HR Reporting Hub – Lots of info on Chartfields, Actuals and Commitments

Budget Mgmt - Dept Budg Tbl
- Labour-Ben Account Mapping
- Review Salary Combo by Dept
- Review Fringe Combo by Dept
- Latest Combo Specified Posn
- Latest Combo Specified ID
- History for Specified Position
- History for Specified ID

Pymt Actuals - Fiscal Year
- Lab Dist - Single Account
- SGS Worked Hours Report

Pymt Actuals - Pay Period
- Pay Register - HR Dept on Cheq
- Pay Register - CF Dept Charges
- Payroll Register with RLS
- EarnCd Sums per CF Dept
- EarnCd Sums per CF Combo

Pymt Actuals w Commitments
- Lab Dist w Salary Commitments
- FTE by GL Report
- SGS Payments Report
- SGS Deductions Report

Pymt Actuals - Fiscal Period
- Lab Dist - One Fund-Dept-Prog
- Lab Dist - One Fund-Dept-Proj
- Lab Dist - One Dept - All Prog
- Lab Dist - One Dept - All Proj
- Lab Dist - All Dept - All Prog
- Lab Dist - All Dept - All Proj
- Lab Dist - Faculty Only

Pymt Actuals - ID - Dt Range
- Cost Centre ID and Date Range

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Keys to reading the financial map in Mosaic HR-Payroll

Labour Distribution – Program/Project

Keys to reading the financial map in Mosaic HR-Payroll

Labour Distribution – Result of your search

Keys to reading the financial map in Mosaic HR-Payroll

Labour Distribution and Salary Commitments Report (LDSC)

▼ Administrative Home

HR Reporting Hub

Labour Distribution Report

Labour Distribution and Salary Commitment Report

Run Control ID:	FINANCIAL_FORUM	Report Manager Process Monitor [Run]
Language:	English ▼	

Report Request Parameters

Show Actuals up to

Fiscal Year	[ ]	05/01/2019 Calendar Start Date
Period	[ ]	04/30/2020 Calendar End Date

Optional Data Filters	Show Me	File Type
☐ Specific Fund Code(s)	⦿ All Programs	○ PDF
☐ Specific Department(s)	○ Specific Program(s)	⦿ XLS
	○ Specific Project ID	

Enter Fiscal Year

Enter Period

Enter your Data Filters – if you want to see a specific Fund Code and specific Department. Then decide if All Program Codes within that Department or a specific Program Code. For Project you have to select Specific Project id. And, lastly chose whether you want in PDF or Excel (XLS).

🖫 Save   ◔ Return to Search   🗟 Add   🗟 Update/Display

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Keys to reading the financial map in Mosaic HR-Payroll

Labour Distribution and Salary Commitments Report (LDSC)

HR Reporting Hub

Labour Distribution Report

Labour Distribution and Salary Commitment Report

Run Control ID:	FINANCIAL_FORUM	Report Manager Process Monitor **Run**
Language:	English ▼	

Report Request Parameters

Show Actuals up to

Fiscal Year	2020	05/01/2019 **Calendar Start Date**
Period	6	04/30/2020 **Calendar End Date**

> Once you click on or check off the filters you wish, boxes will pop up below and you fill in the Fund Code, Department ID/Code and if you had chosen Specific Program or Project you would also fill those in.

Optional Data Filters	**Show Me**	**File Type**
☑ Specific Fund Code(s)	● All Programs	● PDF
☑ Specific Department(s)	○ Specific Program(s)	○ XLS
	○ Specific Project ID	

Fund(s) to Include | ⬀   First ◀ 1 of 1 ▶ Last

	Fund Code	Fund Name		
1	20 🔍	Operating Fund	➕	➖

Department(s) to Include | ⬀   First ◀ 1 of 1 ▶ Last

	Department ID	Department		
1	10334 🔍		➕	➖

> Click Save

🖫 Save   🔍 Return to Search   📝 Add   📄 Update

> After you have click '**Save**' then click '**Run**' at the top of the page

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Keys to reading the financial map in Mosaic HR-Payroll

Labour Distribution and Salary Commitments Report (LDSC)

▼ Administrative Home

HR Reporting Hub
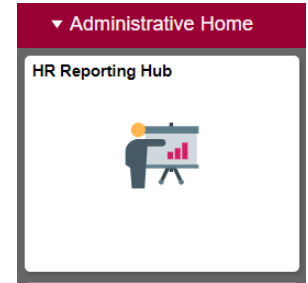
Process Scheduler Request

User ID SYLVEST   Run Control ID FINANCIAL_FORUM

Server Name [▼]   Run Date 11/08/2019 [📅]

Recurrence [▼]   Run Time 3:01:26PM   Reset to Current Date/Time

Time Zone [   ] 🔍

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☑	Labour Dist / Salary Commit	MCM_LABOR	Application Engine	Web ▼	TXT ▼	Distribution

Just click '**OK**'

OK   Cancel

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Keys to reading the financial map in Mosaic HR-Payroll

Labour Distribution and Salary Commitments Report (LDSC)

HR Reporting Hub

Labour Distribution Report

Labour Distribution and Salary Commitment Report

Run Control ID:	FINANCIAL_FORUM	Report Manager Process Monitor [Run]
Language:	English ▼	Process Instance:178971

Report Request Parameters

Show Actuals up to

Fiscal Year	2020	05/01/2019 Calendar Start Date
Period	6	04/30/2020 Calendar End Date

Optional Data Filters
- ☑ Specific Fund Code(s)
- ☑ Specific Department(s)

Show Me
- ● All Programs
- ○ Specific Program(s)
- ○ Specific Project ID

File Type
- ● PDF
- ○ XLS

Fund(s) to Include | ⬜   First ◀ 1 of 1 ▶ Last

	Fund Code	Fund Name		
1	20 🔍	Operating Fund	➕	➖

Department(s) to Include | ⬜   First ◀ 1 of 1 ▶ Last

	Department ID	Department		
1	10334 🔍		➕	➖

You will be bought back to previous screen. Click on Report Manager.

💾 Save   🔍 Return to Search

➕ Add   📄 Upc

Keys to reading the financial map in Mosaic HR-Payroll

Labour Distribution and Salary Commitments Report (LDSC)

▼ Administrative Home

HR Reporting Hub

Click on Administration Tab

| List | Explorer | **Administration** | Archives |

View Reports For

User ID SYLVEST   Type [▼] Last [▼] [1] Days [▼] [Refresh]

Status [▼]   Folder [▼]   Instance [   ] to [   ]

Report List   Personalize | Find | View All | 🔲 | 🔳   First ◀ 1-4 of 4 ▶ Last

You can retrieve your report once the status shows 'Posted' (if not yet "Posted", you can press "Refresh" button above)

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
☐	183643	178971	Labour Dist / Salary Commit	11/08/2019 3:04:31PM	Text Files (*.txt)	Posted	Details
☐	183635	178967	Labour Dist / Salary Commit	11/08/2019 12:50:58PM	Text Files (*.txt)	Posted	Details
☐	183628	178960	Labour Dist / Salary Commit	11/08/2019 10:58:49AM	Text Files (*.txt)	Posted	Details
☐	183626	178958	Labour Dist / Salary Commit	11/08/2019 10:54:05AM	Text Files (*.txt)	Posted	Details

☑ Select All   ☐ Deselect All

[Delete]   Click the delete button to delete the selected report(s)

Once status shows 'Posted' click on report Description to view

Go back to Labour Dist and Sal Commit Rpt

💾 Save

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Keys to reading the financial map in Mosaic HR-Payroll

Labour Distribution and Salary Commitments Report (LDSC)

▼ Administrative Home

HR Reporting Hub

Report Detail

Report

Report ID	183643	**Process Instance**	178971	Message Log
Name	MCM_LABOR	**Process Type**	Application Engine	
Run Status	Success			

Labour Dist / Salary Commit

Distribution Details

Distribution Node	prdwprd	**Expiration Date**	11/15/2019

File List

Name	File Size (bytes)	Datetime Created
AE_MCM_LABOR_178971.stdout	821	11/08/2019 3:05:33.409408PM EST
AE_MCM_LABOR_178971.trc	2,348	11/08/2019 3:05:33.409408PM EST
Labour Distribution and Salary Commitment Report - 178971.pdf	95,107	11/08/2019 3:05:33.409408PM EST

Distribute To

Distribution ID Type	*Distribution ID
User	SYLVEST

OK   Cancel

> Click on file ending in pdf or xls (depending on what you chose earlier).

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Keys to reading the financial map in Mosaic HR-Payroll
LDSC – Report Results (PDF format)

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Labour Distribution and Salary Commitment Report as of October 2019 (Actuals to OCT)

Run Date November 8, 2019

Fund(s): 20
Department(s): 10334
Program(s): All

	Actual Totals	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	Commitments Total	Yearly Total
Combo 20 10334 500001 30000 Earnings															
	2,105.96	2,105.96	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,105.96
	2,339.51	2,339.51	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,339.51
	2,285.59	2,285.59	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,285.59
	6,731.06	6,731.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6,731.06
Combo 20 10334 500001 30035 Earnings															
	93,406.92	14,039.76	14,039.76	14,517.20	14,517.20	21,775.80	14,517.20	21,775.79	14,517.19	14,517.19	14,517.19	14,517.19	13,479.21	93,323.76	186,730.68
	103,446.69	15,596.76	15,596.76	16,056.26	16,056.26	24,084.39	16,056.26	24,084.38	16,056.25	16,056.25	16,056.25	16,056.25	14,908.23	103,217.61	206,664.30
	100,231.58	15,022.36	15,022.36	15,597.08	15,597.08	23,395.62	15,597.08	23,395.62	15,597.08	15,597.08	15,597.08	15,597.08	14,481.89	100,265.83	200,497.41
	297,085.19	44,658.88	44,658.88	46,170.54	46,170.54	69,255.81	46,170.54	69,255.79	46,170.52	46,170.52	46,170.52	46,170.52	42,869.33	296,807.20	593,892.39
Combo 20 10334 500111 30000 Earnings															
	5,097.89	881.59	766.60	766.60	766.60	1,149.90	766.60	1,149.90	766.60	766.60	766.60	766.60	711.79	4,928.09	10,025.98

Page 1

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Keys to reading the financial map in Mosaic HR-Payroll

LDSC – Report Results (Excel format)

Labour Distribution and Salary Commitment Report to October 2019 (Actuals to OCT)

Fund(s): 20

Department(s): 10334

Program(s): All

Run Date November 8, 2019

Combo and Type	Employee	Actual Totals	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	Commitments Total	Yearly Total
20 10334 500001 30000 Earnings		2,105.96	2,105.96	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,105.96
20 10334 500001 30000 Earnings		2,339.51	2,339.51	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,339.51
20 10334 500001 30000 Earnings		2,285.59	2,285.59	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,285.59
20 10334 500001 30035 Earnings		93,406.92	14,039.76	14,039.76	14,517.20	14,517.20	21,775.80	14,517.20	21,775.79	14,517.19	14,517.19	14,517.19	14,517.19	13,479.21	93,323.76	186,730.68
20 10334 500001 30035 Earnings		103,446.69	15,596.76	15,596.76	16,056.26	16,056.26	24,084.39	16,056.26	24,084.38	16,056.25	16,056.25	16,056.25	16,056.25	14,908.23	103,217.61	206,664.30
20 10334 500001 30035 Earnings		100,231.58	15,022.36	15,022.36	15,597.08	15,597.08	23,395.62	15,597.08	23,395.62	15,597.08	15,597.08	15,597.08	15,597.08	14,481.89	100,265.83	200,497.41
20 10334 500111 30000 Earnings		5,097.89	881.59	766.60	766.60	766.60	1,149.90	766.60	1,149.90	766.60	766.60	766.60	766.60	711.79	4,928.09	10,025.98
20 10334 500111 30000 Earnings		2,039.16	352.64	306.64	306.64	306.64	459.96	306.64	459.96	306.64	306.64	306.64	306.64	284.71	1,971.23	4,010.39
20 10334 500111 30000 Earnings		2,039.16	352.64	306.64	306.64	306.64	459.96	306.64	459.96	306.64	306.64	306.64	306.64	284.71	1,971.23	4,010.39
20 10334 500111 30000 Earnings		2,039.16	352.64	306.64	306.64	306.64	459.96	306.64	459.96	306.64	306.64	306.64	306.64	284.71	1,971.23	4,010.39

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Keys to reading the financial map in Mosaic HR-Payroll

How to get Labour Distribution Access?

- Labour distribution access is maintained by Chris Sylvester in Budgeting Services

- You can email sylvest@mcmaster.ca requesting access with the following information:

  - Mac User ID (NOT employee id#)

  - Chartfield string – Fund Code, Dept Code and Program or Project Code

  - Approval of PI (for research projects) or Department Manager

- NOTE: when you receive access to labour distribution reports you are also granted access to the FTE by GL Report. How to run/view this report follow in the slides.

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Keys to reading the financial map in Mosaic HR-Payroll
FTE by GL Report

HR Reporting Hub

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FTE by GL Report

Enter any information you have and click Search. Leave fields blank for a list of all values.

| Find an Existing Value | Add a New Value |

▼ Search Criteria

Run Control ID: begins with ▼ [   ]

☐ Case Sensitive

| Search | Clear | Basic Search ⬚ Save Search Criteria

Add a New Value or Find an Existing Value. Give Run Control ID name of your choice (no spaces)

Find an Existing Value | Add a New Value

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Keys to reading the financial map in Mosaic HR-Payroll

FTE by GL Report

HR Reporting Hub

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FTE by GL

Run Control ID: FTE_Report   Report Manager   Process Monitor   [Run]

Request Parameter(s)

*Fiscal Year `2020`

*Accounting Period `1`

Run Type `All Departments ▼`

[Save] [Return to Search]

> Enter Fiscal Year

> Enter Accounting Period

> Can chose All Departments or Selected Departments (all based on your access)
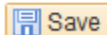
> After you have chosen your Parameters, click 'Save' and then click 'Run' and follow same process as when you run LDSCR. This report comes only in excel.

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Keys to reading the financial map in Mosaic HR-Payroll
FTE by GL – Report Results (Excel)

FTE by GL Report

Actuals to October 2020, Run Date 2019-11-12, Report for Selected Department/s

Year	Employee ID	Last Name	First Name	Ge	HR Dept	Position	Union	Fun	Account	CF Dept	Program	Proje	Total	May	June	July	Aug	Septe	Octo	Nove	Dece	Janu	Febru	March	April	Commit	Total	FT Scheduled	FTE
2020				F		00013816		20	540001		30000		931	161	140	140	140	210	140	140	140	140	140	140	200	900	1831	1829.9995	1.0005
2020				F		00005964		20	540001		30000		931	161	140	140	140	210	140	140	140	140	140	140	200	900	1831	1829.9995	1.0005
2020				M		00100036		20	540001		30000		931	161	140	140	140	210	140	140	140	140	140	140	200	900	1831	1829.9995	1.0005
2020				F		00008438		20	540001		30000		161	161	0	0	0	0	0	0	0	0	0	0	0	0	161	1829.9995	0.088
2020				F		00008438		20	540001		30000		0	0	0	0	0	0	0	140	140	140	140	140	200	900	900	1829.9995	0.4918
2020				F		00105615		20	540001		30000		931	161	140	140	140	210	140	140	140	140	140	140	200	900	1831	1829.9995	1.0005
2020				F		00111522		20	540001		30000		931	161	140	140	140	210	140	140	140	140	140	140	200	900	1831	1829.9995	1.0005
2020				F		00008438		20	540001		30000		651	0	21	140	140	210	140	140	140	140	140	140	200	900	1551	1829.9995	0.8475
2020				M		00013816		20	540001		30000		721	161	140	140	140	140	0	0	0	0	0	0	0	0	721	1829.9995	0.394

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Looking ahead to the Future

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The road to the future

Position Management Review
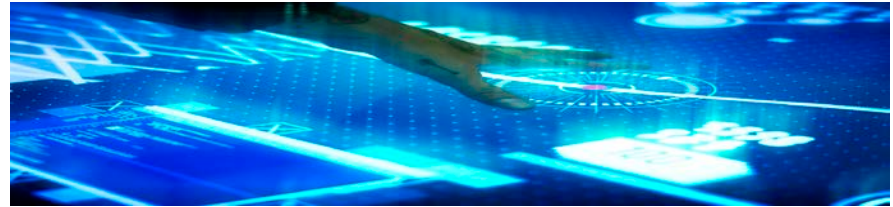
- Opportunity to re-examine the original set up of position management in Mosaic

  - Look to utilize more 1:1 positions (1 employee per position) – best practice

    - Ideally eliminate need for the "appointment" level override on the DBT

    - Currently conducting analysis by employee group

  - Aim to clean-up vacant positions, and more effectively reuse existing positions

    - Currently over 50% of the 16,500 positions in Mosaic are vacant

  - Potential for foundational improvements that will

    - Be integral to simplifying and improving end-to-end payroll processing and improving data quality (e.g.: chartfield management)

    - Unlock efficiencies and allow better leveraging of PeopleSoft functionality (e.g.: guided processes and automated system updates)

    - Enable changes that will improve user experience (e.g.: HR Event Form; company directory visual org chart; recruitment processes)

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The road to the future

HR Event Form – Request position (DBT) chartfield update guided process

- Many tasks on HREF will be replaced by configurable guided processes delivered by PeopleSoft

  - E.g.: reports to update; location change; initiate promotion

  - However, a chartfield update (i.e.: DBT) process is not delivered

- Instead aim is to design a McMaster-specific guided end-user process

  - Enabled by improving position management, and target of eliminating 'appointment' level DBT records

  - Objective is to provide Faculties and Departments with more hands-on control of their chartfield updates in Mosaic HR-Payroll

  - Would include approval workflow routing, as appropriate

  - Targeted to remove non-value-added steps, and eliminate duplicate entry

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The road to the future

HR Event Form – Request position (DBT) chartfield update guided process

- Sample - potential simplification of design; guided process steps

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The road to the future

HR Event Form – Request position (DBT) chartfield update guided process
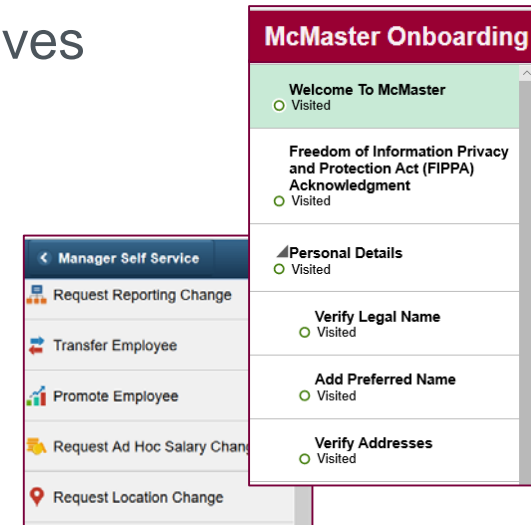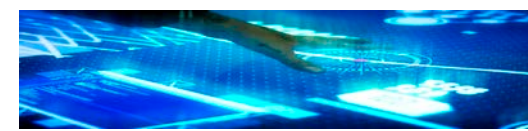
- Sample - potential simplification of design; guided process steps

The road to the future

Many more HR-Payroll continuous improvement initiatives

- HR Event Form (e.g.: online guided processes)

- New employee onboarding

- FHS special premium payments (SPP) intake process

- Recruitment process end-to-end review

- Company directory and visual org chart

- Employee self service (e.g.: banking updates)

- Leave management process improvements, and pre-authorized withdrawal

- Improved reporting and analytics (e.g.: Business Intelligence reports; simplified analytics; reports and queries)

- Reducing manual and duplicate entry (e.g.: uploads)

- Employee benefits and life events changes

- Time management new features and improvements

- Process and data quality reviews

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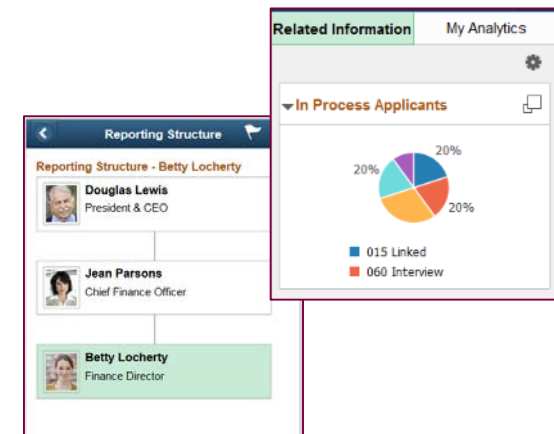
The road to the future

Time for your feedback via **Mentimeter**

www.menti.com

Thank You!

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