TRANSACTION PAGES

What they are and how to use them

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WHAT WE'LL COVER

1. Transaction Pages Basics

2. Types of Data

3. Common Transactions, Tips and Things to Avoid

4. Takeaways and More Resources

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Before we begin…

Remember, your experience is invaluable.

Though it may seem like a big shift, much of HCM works the way you're used to. The biggest changes surround

- New pay groups
- Non-Person Profiles (NPPs)
- Funding
- Payroll expense transfers (PETs)
- Standard hours now expressed as percentage of time

Today, we'll cover transaction page basics, common transaction types and tips and tricks for success.

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TRANSACTION PAGES BASICS

So, what are transaction pages?

Transaction pages centralize data in one web form. This means you can update several pieces of information at once.

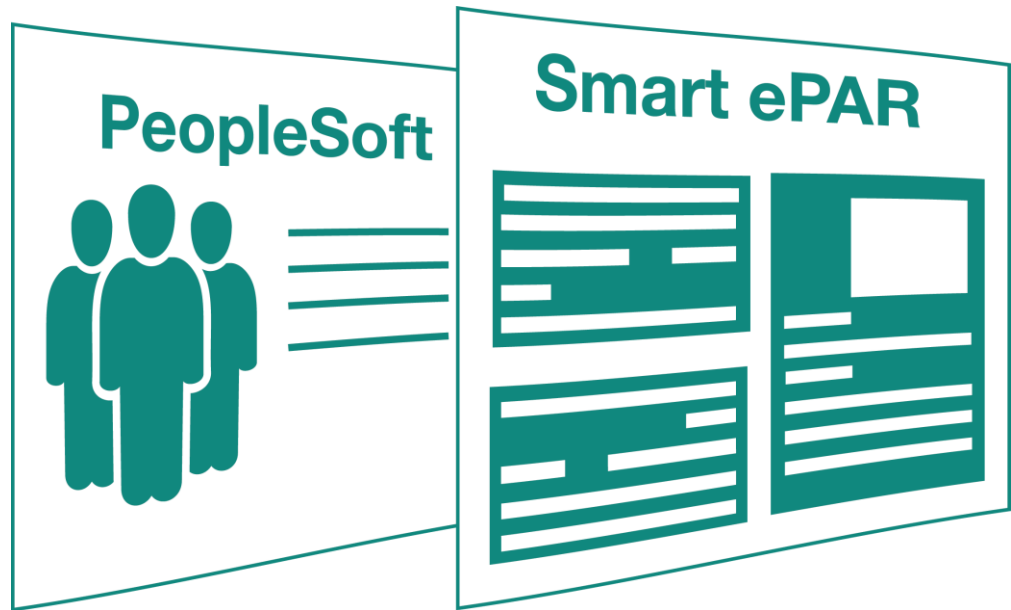# How do transaction forms work with PeopleSoft?

These transaction forms, or formally Smart ePAR, sit on top of PeopleSoft.

In other words, transaction pages are simply tools that organize PeopleSoft data.
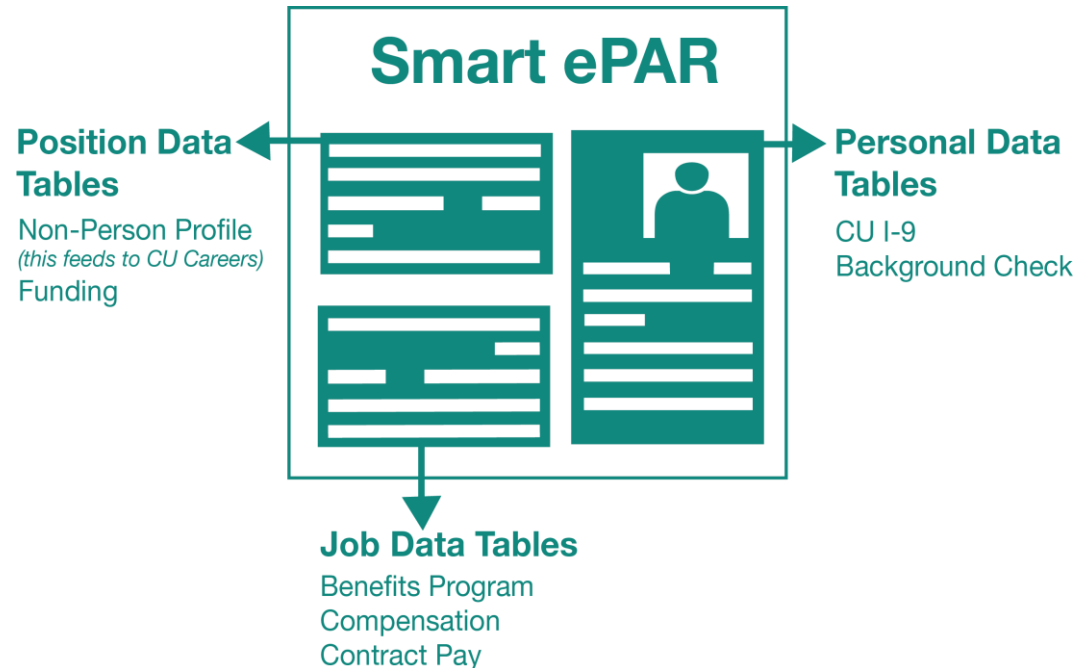

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What make up transaction pages?

Transaction pages are made of dozens of tables. The main three include Personal Data, Job Data and Position Data.

Smart ePAR

Position Data Tables
Non-Person Profile
(this feeds to CU Careers)
Funding

Personal Data Tables
CU I-9
Background Check

Job Data Tables
Benefits Program
Compensation
Contract Pay

Each of these tables have sub-tables, too. These are just a few examples.

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Using transaction pages

Many transactions require updates to job data and position data tables. **That's where transaction pages come in:**

A transaction page prompts you for information related to a certain task, such as transferring an employee.

When you submit the transaction, the data route for approval to ensure accuracy.

Once approved, the transaction page updates several tables simultaneously.

When to use transaction pages

So, you'll use transaction pages only for updates that require approval.

Personal information updates, such as address changes**, do not require approval.** Employees can update personal information through the CU Resources tab of the employee portal.

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Let's review a few tips:

- **Check dates.** Many transactions fail because of conflicts with other dates in HCM.

- **Always use the tab key to navigate,** and allow the field to refresh before moving on.

- **Do not do transactions separately**. The advantage of transaction pages is that you can make several data changes at once.

- **Try, try again will not work**. Once you get an error, stop and call or email for assistance.

- Use this guide to identify which transaction to use: https://www.cu.edu/sites/default/files/Transaction-Action-Reasons-List.pdf

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TYPES OF DATA

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Types of Data: Personal Data

As you guessed, this has everything to do with someone's personal information, including:

- Name
- Social Security Number
- Address
- Phone Number
- Email address
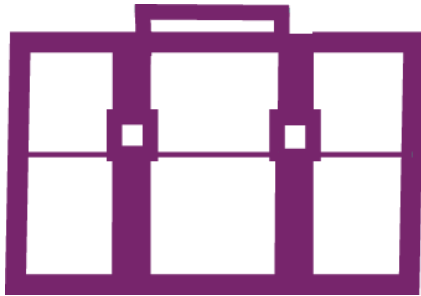- Our system also has custom tables for background checks and I-9 information.

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Types of Data: Position Data

This includes all the main elements of a position, similar to a job posting:

- Job code

- Supervisor

- Standard hours

- Department Location

Only Campus HR and ES can update/correct position data.

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Position Data: Effective Dates

It's important that every row you enter has a unique effective date that's **sequential**. Here's an example:

Say you want to create a position and then hire an employee. Make the effective date for the first transaction **1/29/2016** and the effective date for the second transaction *later*, such as **1/30/2016.**

In other words, they can't be the same date!

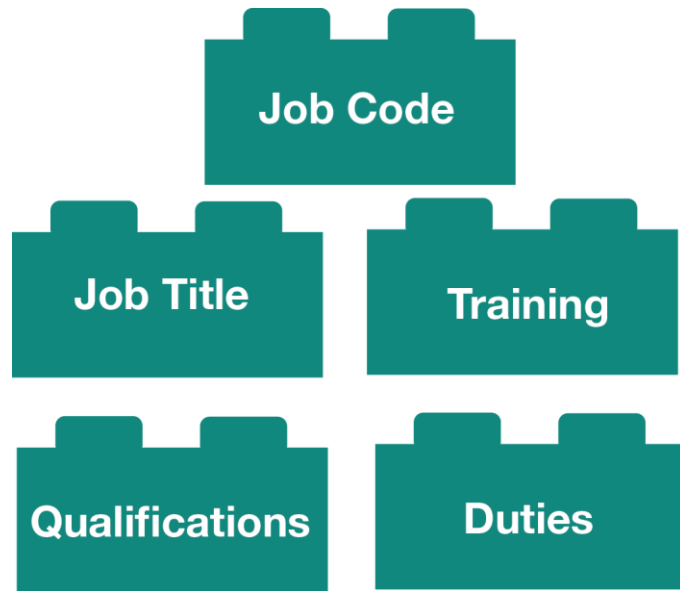Otherwise the system may get confused and bungle your transaction.

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Position Data: Non-Person Profiles

Position data make up Non-Person Profiles (NPPs). Think of NPPs as building blocks for positions.

Before you send this bundle of information for approval, check the **CU Careers** box so the data populates in our recruiting site.
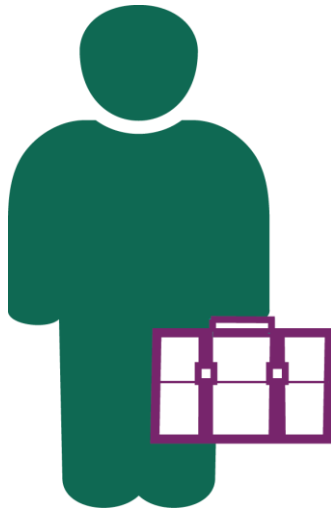
Learn how to build positions here:
https://www.cu.edu/hcm-community/createmodify-position

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Types of Data: Job Data

Job data pair a person with a position, combining:

- Position data

- Compensation employment dates

- Benefit program participation

Unlike Position data, you can add as many rows to job data with **the same effective date** as you like. This is because job data use effective sequence logic.

Only Campus HR and ES can update/correct job data.

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COMMON TRANSACTIONS, TIPS AND THINGS TO AVOID

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Types of Transactions

We break down transactions in two categories:

Non-Pay Actions

Pay Actions

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Tip: Find step-by-step guides with the clipboard icon

Non-Pay Transactions:

Non-Pay actions include the following:

- Job change

- Group change

- POI (Person of Interest)

- Separation contract

- Pay group

- Termination

- Leaves

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Non-Pay: Termination

This transaction terminates an employee from a position.

Tips for Success:

- Make sure the **Contract End** date and **Termination** date are the same.

- The termination is only valid if the HR Status is **Active.**

- Enter an **Effective date** after 10/01/2015.

- If you receive a "data conflicts" error, there may be a row after the termination date causing the transaction to fail.

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Step-by-Step: Termination
https://www.cu.edu/sites/default/files/Separations.pdf

Non-Pay: POI

This transaction attaches a POI's department to their security, or who can see them in the system.

Tips for Success:

- Use different effective dates if the POI has more than one "TYPE."

- All POIs must have a Social Security number. You can can use **888 + birth date**. For someone born January 10, 1985, for example, the placeholder SSN would be **888011085**.

- Remember, if you enter a POI using a placeholder SSN number, the placeholder will carry over when your hire the employee. You'll need to enter their correct SSN.

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Step-by-Step: Adding a POI
https://www.cu.edu/sites/default/files/Add-Person-of-Interest_Test-Script.pdf

Non-Pay: Contract Pay

This transaction sets up the contract type and dates. Only make this transaction to change contracts from 9/9 and 9/12, or vice versa. You must have contract transactions approved by Employee Services.

Tips for Success:

- DO NOT use this transaction for new semester contracts.

- **Effective date** has to be the same as the **contract start date**

- Contract **termination end date** has to be the same as **contract end date**

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Blog article: Contract Pay
https://www.cu.edu/blog/hcm-community/entering-contracts-or-making-pay-rate-changes-use-these-resources-your-guide

Non-Pay: Job Changes

Use Job Changes to change appointment, supervisor, appointing authority, location, FLSA , pay group, working title or faculty promotions.

Tips for Success:

- For hires, **you must enter a personal email address** (e.g., jane.smith@gmail.com) and mark it as "preferred." This is required for onboarding.

- Be sure to select the correct pay group; otherwise your employee may not get paid.

Step-by-Step: Hiring an Employee Recruited Through CU Careers http://www.cu.edu/sites/default/files/Hiring-an-employee-recruited-through-CU-Careers.pdf

Step-by-Step: Hiring an Employee NOT Recruited through CU Careers: http://www.cu.edu/sites/default/files/Hiring-an-Employee-NOT-Recruited-Through-CU-Careers.pdf

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Common Missteps: Job Changes

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- **"Data Conflicts" error** – dates are conflicting. For example, there is a row in position data with the same effective date.

- **"Department is ineligible for budget" error** – transaction effective date is before the department budget date, or the department budget date is missing

- Standard hours cannot be fewer than the one-hour minimum.

- Contract **pay effective date** cannot be earlier than **hire date**.

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Pay Transactions:

Non-Pay actions include the following:

- Department budget

- Additional pay

- Hires, rehires and additional jobs

- Position changes

- Pay rate changes

- Transfers

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Pay: Funding Changes

Funding pages make up the Department Budget Table, which stores distribution information for earnings, deductions and taxes.

Tips for Success:

- Only select one funding distribution to update.

- If you want to start the funding on a specific date, you must use the **Change Effective Date** action reason.

- The distributions must add to 100 percent, even when selecting amounts.

- Department ID speedtypes come from the Finance Department, not the HR Department.

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Step-by-Step: Funding Changes
http://www.cu.edu/sites/default/files/Funding-Change_Test-Script.pdf

Common Missteps: Funding Changes

- Using the wrong effective date

- Selecting too many funding groups

- Forgetting to add the percentage or amount

- Total distribution does not equal 100 percent in the DBT

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Pay: Additional Pay

A one-time payment issues pay once during a pay period and ends on or after the pay end date. A recurring payment issues a payment over more than one pay period.

Tips for Success:

- Both one-time and recurring payments must be approved. Once approved, one-time payments feed into Reported CU time, while recurring payments feed into payroll.

- For one-time payments, **always enter the End Date** of that month. The appointment date is different.

- Recurring payments require both a monthly amount and a goal amount. You can split this payment between more than one speedtype to create two separate additional pay transactions.

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Step-by-Step: One-Time Payment
http://www.cu.edu/sites/default/files/Additional-Pay-One-Time-Payment.pdf

Step-by-Step: Recurring Payment
http://www.cu.edu/sites/default/files/Additional-Pay-Recurring-Payment.pdf

Common Missteps: Additional Pay

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- Entering a payment end date later than when you want to issue the payment

- Failing to approve one-time/recurring payment transactions

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Pay: Position Changes

This transaction prepares or modifies a NEW position for recruitment.

Tips for Success:

- Do not use these pages if you have someone identified to fill the position, or you've already sent the position data to CU Careers.

- Date the position date later than the last position **effdt** row. You can date the position page as today or earlier.

- To feed to CU Careers, such the **CU Careers** box. Each position must have a filled supervisor to feed over.

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Web Resource: Create Positions
https://www.cu.edu/hcm-community/createmodify-position

Common Missteps: Position Changes

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- Entering the wrong effective date

- Enter too much information in the NPP.

- Entering more than one Minimum Qualification (1,325 characters) when feeding your position to CU Careers.

- Entering the wrong figures for FTE and percent of time. For someone who works 40 percent, FTE should be expressed as a decimal **(.4)** while percent of time should be expressed as a whole number **(40).**

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TAKEAWAYS AND MORE RESOURCES

We built a website for you!

It's called the **HCM Community site**.
Here, you'll find step-by-step guides and useful policy information.

https://www.cu.edu/hcm-community

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Don't spin your wheels!

We know you're working hard to maintain business as usual.

To ensure transactions go as smoothly as possible, **please follow the step-by-step guides carefully** before starting any transaction. It's helpful to review common missteps, too.

If you receive an error, STOP

The best thing you can do is call your Campus HR office or Employee Services.

We can help you identify the error, and in some cases, clear the transaction so you can try again.

Call: **303-860-4200** (HCM: ext. 2, option 2; CU Careers: ext. 5)

Or send an email: http://www.cu.edu/employee-services/forms/hcm-report-issues-and-suggestions

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