

Project LINK  
HR Payroll

# Banner HR Payroll@ UNM

Presented by  
John Ortiz  
Project Director,  
LINK HR Payroll Project  
University of New Mexico

# Project : Link HR/Payroll



## Stakeholders

- **Employees** – 15000 + including faculty, staff and student employees
- **Hospital Employees** – 4400+ may be added into Banner, not as employees, but as affiliates for directory information. (pending decision)

# Banner Infrastructure

## Banner 7



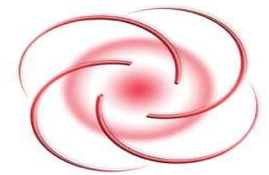
- Currently on Banner 6 software release
  - Support from SCT/Sungard expires end of 2006
- Banner 7 is next release + ODS 2.2
- Finance, Student, Financial Aid need to go to Banner 7 + ODS 2.2 by January 2007.
  - Banner 7 - major impact on Student system.
- ***HR/Payroll go-live pushed back to July 2007 from January 2007 because of Banner 7 implementation.***

# Banner HR/Payroll Includes: Basic Capabilities



- Biographic and Demographic Information
- Employment Administration
- Benefits/Deductions Administration
- Position Management
- Time Entry and Payroll Processing
- Compensation Administration

# Banner HR/Payroll Includes: Optional Components



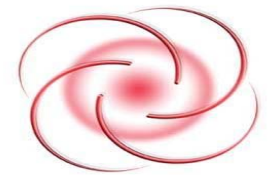
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- Applicant Tracking (very basic)– will continue to utilize eHIRE/eJOBS
- Payroll History
- Employee Relations Administration- limited functionality- will use only to track labor related and bargaining unit information.
- Health & Safety Administration
- Faculty Administration/ Faculty Load
- Personnel Services Budgeting (Future)
- Electronic Approvals
- Employee Self-Service
- Time Entry
- Licensing & Certifications (Post Go-Live)
- Salary Planner (Post Go-Live)
- Workflow (Post Go-Live)

# Ongoing Project Activities:

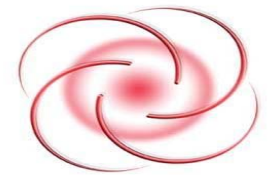


- Issue Analysis
- Data Clean-Up
- Interface Development,
- Report Building
- “Banner Navigation” & “Securing Private Data” Training
- Security Administration
- Testing Banner 7



# July – Dec. 2006 Timeline

- July-Sept. - Continued refinement of conversion HRS to Banner
- July-Sept. - Configuration of Banner system representing UNM business needs
- August - Faculty Load/Admin Kickoff
- July – Sept. - Payroll / HR Testing, Testing, Testing
- Oct. - Nov. - Core Offices Training for those doing testing of HR/Payroll & further testing & refinement of processes
- Dec 2006 Completion of major interfaces, reports, processes, etc.



# Jan. – June 2007 Timeline

- Jan. 2007 - Complete all remaining programming, interfaces, scripts, EPAFS, Appworx, Time Entry
- Feb. - Load Testing
- Feb.- Mar. - Training for rest of core offices and time entry training (Train2)
- Feb.- Mar. - Security
- March - May - Dual Entry Time Information
- March - May - Dual System Testing (Parallel Testing)
- June 2007 - End User Self Service/EPAF Training?

# Production (Go-Live) July 2007



- July 13th Last **bi-weekly** payday in HRS
  - Pay period begin - 06/23/2007
  - Pay period end - 07/06/2007
  - Check Date - 07/13/2007
- June 29th Last **monthly** payday in HRS
- **Fiscal Year close July 13, 2007**

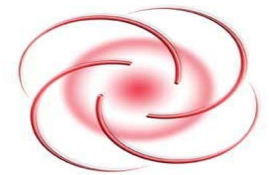
# Production (Go-Live) July 2007 (cont.)



- **Final Conversion:** Sat and Sunday, July 14-15, 2007  
***Live in Banner.***
- **July 27th** First bi-weekly payday in Banner: No time entry. We will convert time reports from HRS into Banner for the first payroll to minimize departmental issues.
  - Pay period begin - 07/07/2007
  - Pay period end - 07/20/2007
  - Check Date - 07/27/2007
- **July 31st** First monthly payday in Banner: No leave time entry. Leave for June was submitted and held for fiscal year end accruals. We will convert the leave to Banner.
  - Pay period begin - 07/01/2007
  - Pay period end - 07/31/2007
  - Check Date - 07/31/2007

# Production (Go-Live)

## July 2007 (cont.)



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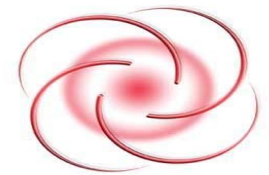
- July – Aug. 2007 - Follow-up training and support as required
- Aug. - Sep. 2007 - Transition team to home departments
- Sept. 2007 - Project Close Activities

# Reporting



- Canned Reports: Oracle & Hyperion
- Dashboards to pull key information
  - Security is being researched
- Current Analysis of Reports
  - **Critical:** 431 down to 195 reports that need to be programmed
  - **Useful:** 91 down to 31 reports that need to be programmed
  - **Still need to be surveyed:** 145
  - **No longer needed:** About 250

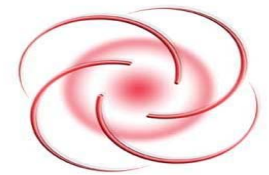
# Time Entry Options



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- Departmental Time Entry
- Web Time Entry
- Feeds - Kronos

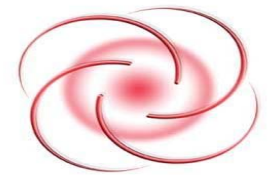
# Introduction to Departmental Time Entry



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- Departmental time entry is used by department timekeepers to enter exception time for exempt employees and time sheets for non-exempt employees.
- The main thrust of departmental time entry is to decentralize time entry and provide an electronic means to approve time sheets

# Introduction to Departmental Time Entry (cont.)



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- PHATIME is a data entry form where the department timekeeper enters time for the group of employees within his/her timesheet organization.
- PHATIME regulates earning codes that can be submitted with a timesheet and provides an area to enter comments for each timesheet.

# Introduction to Departmental Time Entry (cont.)



- A Proxy should always be assigned for Timekeepers and Approvers
- Policies will need to be revised and possibly new ones added.
- The Timekeeper and Proxy must have a Banner Oracle ID. Approver will approve in self-service.

# Introduction to Web Time Entry



Banner Web Time Entry enables employees to report their time on the Web and to submit the time transactions (time sheets) directly from the Web to the Banner HR system for approval by supervisors.

# Introduction to Web Time Entry (cont.)



- Allows employees and supervisors to see time taken on the web
- Eliminates the paper time sheets
- Policies will need to be revised and possibly new ones added.
- Security - Once an employee is logged in to **MyUNM**, they will be able to access their timesheet.
- Exception time-entry for exempt employees

# Introduction to Web Time Entry (cont.)



- Banner is used via the web, so an appropriately-configured computer with a web browser and Internet access is all that's required to use Banner web entry.
- Access to Banner will require a Banner-authorized account. Gaining access to Banner will also require successful completion of Banner training. As the time for release of Banner draws near, more information will be made available regarding these processes and procedures.

# Project Plan for Web Time Entry Pilot



- Analysis of Banner Web Time Entry options & possible use at UNM will be completed by August 2006.
- This analysis should incorporate a recommendation to perform or not perform a web time entry pilot as part of the July 2007 implementation.

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Home Search Web Mail My Yahoo! Answers Games FIFA World Cup Music

Address <https://my.unm.edu/cp/home/displaylogin> Go Links



**Login**

NetID:

Password:

You have requested access to a site that requires you to login with a UNM NetID.

[Having problems logging in? Click here.](#)

**myUNM News**

myUNM has been experiencing technical difficulties where users are experiencing either extremely slow response or are being timed out completely. This problem typically occurs between noon and 2 pm and requires the portal to be restarted. The restart takes approximately 5 minutes but all users will be disconnected during this time and required to login again. We are working with the vendor to resolve this problem.





We apologize for any inconvenience caused.

myUNM is restarted every night to perform backups. Typically this happens sometime between midnight and 2AM. The restart takes approximately 5 minutes but all users will be disconnected during this time and required to login again.

**Welcome to myUNM**

myUNM is your personal gateway to UNM. The myUNM portal provides the entire campus community centralized access to University resources and the ability to customize the portal to suit their individual needs by selecting which resources are available.

**What's Inside?**

-  **LoboWeb for Students:** LoboWeb will be replacing I-TEL-UNM for Registration, Grades, Financial Aid, Admissions info, etc.  
To get to LoboWeb for Student, log in to myUNM with your UNM NetID and password, and then click on the Student Life tab.  
For more information about the UNM NetID and password, please visit <http://countdown.unm.edu>.
-  **E-mail:** The portal email is likely to be the preferred email application for students, or other "nomadic" style users who prefer the ability to check email via a Web interface rather than be dependent on one computer and a proprietary email application. Portal email is a robust application and you can also check email from other provider accounts with it.
-  **Calendar:** Campus community members - especially students! -- are encouraged to try out the calendar. The portal calendar is a great resource for students, classes, and groups/organizations to track schedules, tests, meetings and other events. Those on campus already using Oracle or Groupwise should continue to use those calendars to schedule University business-related meetings and events.
-  **Groups:** The Group Studio feature provides an easy-to-use Web presence for student, department, and other campus organizations. Group Studio applications include chat, where you can text chat online in real time; a message board to exchange information, and file sharing where groups can post and exchange files. Any campus organization or department that currently has its own NetID may request a Group via the Group Studio application. If an organization/department does not have its own NetID, you must first complete and return the [Organization/Departmental NetID request form](#) to the CIRT Computer Accounts office.



Welcome Robert A Langmead  
You are currently logged in.

- e-mail
- calendar
- groups
- logout
- help

Home Campus Life Library Employee Life June 23, 2006

### Human Resources

General Information

- HR Home
- ePAN
- eJobs
- Salary Structure Table

Career Development

- Career Development Home Page
- Education and Training
- Job Enrichment
- Career Ladders
- Career Advancement

Staff Resources

- EHPP
- EOD
- OEO
- Dispute Resolution

### What's New in HR

[Application for Dependent Education](#)

Banner Updates

[New Authorization Request Application](#)

Term Appointment Updates

- Memo to Clarify Term Appointment Procedures
- Term Appointment Memo of Understanding
- Notification of Completion of Term Appointment

[Work + Life](#)

### Banner Applications

Transaction and Real-time Query Systems

- Internet Native Banner
- LoboWeb
- LoboMart
- Workflow

Reporting

- E-Print
- Hyperion

Banner Resources

- Banner Authorization Requests
- Report a Duplicate Person/Non-person
- Search Class Schedule
- Search Course Catalog
- Electronic Forms
- Purchasing Department Website

### Benefits

Insurance

- Health Insurance
- Dental Insurance
- Vision Insurance
- Life Insurance
- View All Insurance Benefits

Education

- Dependent Education Program
- Tuition Remission
- Staff Development & Training.

Retirees

- Educational Retirement Board
- Alternative Retirement Plans

### Employee and Organizational Development

EOD provides training and a variety of organizational development consultations to UNM employees. Our Training Programs cover all aspects of work here at the university: Administrative, Management/Leadership, and Personal/Professional.

[EOD Home Page](#) (Course descriptions)  
[Learning Central](#) (Register for courses and manage your learning plan)

### Banner Announcements

No current announcements.

### Staff Council

Next Meeting: June 20th at 1:00pm :: Hibben Center

2006 Staff Appreciation Week

Monday June 19	Tuesday June 20	Wednesday June 21	Thursday June 22	Friday June 23
<b>Pancake Breakfast:</b> More than 500 staff members attended this year!!	<b>UNM Staff Council Meeting:</b> The Council Celebrates 16 Years of service to staff	<b>Books from Staff for Staff:</b> UNM SUB FREE Books that Staff are recycling.	<b>You Deserve a Break:</b> Noon to 1p on NORTH CAMPUS - fun things for staff ...	<b>TGIF:</b> Noon time concert: <i>Adobe Brothers</i> /eclectic band that has played together for 25 years and features UNM's own Professor Bruce
<b>UNM Staff as Artists:</b> 50 staff members showcase	Hibben Center :: Keynote	Donate a buck, get a book ... funds for postage for	stress reduction activities,	

### Banner Training

Training Databases

- Banner
- LoboMart Training

[Job Aids and Standard Operating Procedures](#)

[Employee and Organizational Development \(Learning Central\)](#)

**FastInfo Knowledge Base:**  
[Search Text \(optional\):](#)



Search  Go

[SITE MAP](#) [HELP](#) [EXIT](#)

**Personal Information** **Employee**

## Summary of Reported Time

Set your printer layout to Landscape before printing.

Colleen Ingram  
Program Manager, S05197-00

[LINK Human Resources Payroll, 475D4](#)

### Time Sheet

Eaming Code	Shift	Total Hours	Total Units	Saturday, Jul 01, 2006	Sunday, Jul 02, 2006	Monday, Jul 03, 2006	Tuesday, Jul 04, 2006	Wednesday, Jul 05, 2006	Thursday, Jul 06, 2006	Friday, Jul 07, 2006	Saturday, Jul 08, 2006	Sunday, Jul 09, 2006	Monday, Jul 10, 2006	Tuesday, Jul 11, 2006	Wednesday, Jul 12, 2006	Thursday, Jul 13, 2006	Friday, Jul 14, 2006	Saturday, Jul 15, 2006
Sick - Minor	1	32				⊗	⊗	⊗	⊗									
<b>Total Hours:</b>		32				⊗	⊗	⊗	⊗									
<b>Total Units:</b>			0															

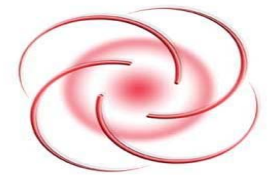
[Previous Menu](#)

# Employee Self Service



- Allows employees to view and change information on Web
  - View Benefits information
  - Leave accruals
  - Deductions
  - Taxes
  - Earnings Statements
  - W2's
  - Electronic Approvals
  - Open Enrollment 2008

# Employee Self Service



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**The University of New Mexico TESTH**

Search   ACCESSIBILITY SITE MAP HELP EXIT

**Personal Information Employee Finance**

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### Main Menu

Welcome, Joyce L. McCarthy, to the WWW Information System! Last web access on Mar 24, 2006 at 08:33 pm

**Personal Information**  
Update addresses, contact information or marital status; review name or social security number change information; Change your PIN; Customize your directory profile.

**Employee**  
Time sheets, time off, benefits, leave or job data, paystubs, W2 and T4 forms, W4 data.

**Finance**  
Create or review financial documents, budget information, approvals.

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RELEASE: 6.1 powered by @sct

http://sct2.unm.edu:8070/pls/testh/twbkwbis.P\_GenMenu?name=pmenu.P\_MainMnu

Search

Go

[RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

[Personal Information](#) [Employee](#) [Finance](#)

## Employee

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### Time Sheet

[Leave Report](#)

[Request Time Off](#)

### Benefits and Deductions

[Retirement, health, flexible spending, miscellaneous, beneficiary, open enrollment, Benefit Statement.](#)

### Pay Information

[Direct deposit allocation, earnings and deductions history, or pay stubs.](#)

### Tax Forms

[W4 information, W2 Form or T4 Form.](#)

[Jobs Summary](#)


[Leave Balances](#)

[Campus Directory](#)

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RELEASE: 6.1

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 Signed in online

Search

Go

[RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

[Personal Information](#) [Employee](#) [Finance](#)

## Benefits and Deductions

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[Retirement Plans](#)

[Health Benefits](#)

[Flexible Spending Accounts](#)

[Miscellaneous](#)

[Open Enrollment](#)

[Beneficiaries and Dependents](#)

[Benefit Statement](#)

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RELEASE: 6.1

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# Follow-up information



## HR/Payroll Project Director

John Ortiz [jportiz@unm.edu](mailto:jportiz@unm.edu)

## Payroll Functional Leads

□ Josie Abeyta  
[abeyta@unm.edu](mailto:abeyta@unm.edu)

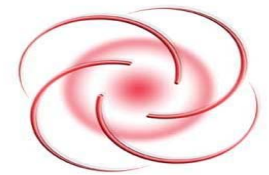
□ Marilyn Mahorich  
[mahorich@unm.edu](mailto:mahorich@unm.edu)

# Follow-up information



## HR Functional Leads

- ❑ Sidney Mason-Coon  
[ismason@unm.edu](mailto:ismason@unm.edu)
- ❑ Joyce McCarthy  
[jmccarthy@salud.unm.edu](mailto:jmccarthy@salud.unm.edu)
- ❑ LaVern Rodriguez  
[vern@unm.edu](mailto:vern@unm.edu)
- ❑ Antoinette Willis  
[awillis@salud.unm.edu](mailto:awillis@salud.unm.edu)



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# Thank you